



HR Compliance Calendar Checklist

Track annual HR responsibilities and compliance activities with this organized monthly checklist.

This checklist provides a general annual HR planning guide for small and mid-sized businesses. Requirements may vary by state or business size. Always consult with a qualified HR professional for specific compliance needs.

January

Select the tasks you have completed for January:

- Review minimum wage updates
- Update labor law posters if required
- Confirm benefits plan documents
- Review I-9 retention and purge schedule

February

Select the tasks you have completed for February:

- EEO-1 reporting preparation if applicable
- Review independent contractor classifications

March

Select the tasks you have completed for March:

- Conduct internal I-9 review
- Review handbook updates

April

Select the tasks you have completed for April:

Audit timekeeping practices

May

Select the tasks you have completed for May:

Mid-year performance check-in planning
Review training compliance requirements

June

Select the tasks you have completed for June:

Benefits review and renewal planning
OSHA record review if applicable

July

Select the tasks you have completed for July:

Review employee classification status
Manager training refreshers

August

Select the tasks you have completed for August:

Audit personnel file documentation
Review leave tracking processes

September

Select the tasks you have completed for September:

Begin annual performance review planning
Review compensation strategy

October

Select the tasks you have completed for October:

- Open enrollment preparation
- Policy review and updates

November

Select the tasks you have completed for November:

- Prepare year-end payroll review
- Confirm required year-end notices

December

Select the tasks you have completed for December:

- Finalize year-end documentation
- Confirm retention and purge schedule
- Plan upcoming year HR priorities

Optional Notes (add any comments or reminders):