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|  | TO DO LIST |
|  | HR/Payroll – End of Year |
| White icon graphic of telephone receiver | |  |  | | --- | --- | |  | Verify Payroll Begin field on the Contract Type | |  | Verify Employee Position/Code/Contract Type/Days/% – Employee Wage Report | |  | Federal Funded Employees – Check Expense Against Budget and Adjust if Needed | |  | Benefits – Reconcile Everything! | |  | Payroll Liabilities – Confirm or Clear | |
|  |  |
| White icon graphic of person walking with shopping bags | |  |  | | --- | --- | |  | Payroll Budget/Remaining Expenses/Accrued Wages | |  | Leave – Verify/Correct Current Year Balances | |  | Leave Policies – Verify Leave Policies | |  | Leave Policies- Verify Employees on Correct Policies | |  | Review Next Year Leave Policy and Update if Needed | |
|  |  |
| White icon graphic of envelopes | |  |  | | --- | --- | |  | Service Record Report – Verify/Correct Data | |  | Non-Returning Employees – Terminate | |  | Set “Do NOT promote” on non-returning positions | |  | Open Next Year General Ledger (or contact your Admin) | |  | Open Next Year Instructional Period (or contract your Admin) | |
|  |  |
| White icon graphic of scissors, hammer, and saw | |  |  | | --- | --- | |  | Update Pay Scales, if Applicable | |  | Update Pay Periods (for pay schedules) | |  | Promote Service Records (Contracts) | |  | Verify Position amounts – run and verify Employee Wages by new Instructional Period | |  | Verify New Leave Balances | |
|  |  |
| White icon graphic of file folder, paper, and hand writing with pen | |  |  | | --- | --- | |  | Employee Contract – Update Positions/Contract Types, if Needed | |  | Run Employee Wages – Update/Verify Wages and Coding – Yes AGAIN! | |  | Benefit Programs – Add New Programs or Offerings/Update Rates at any time | |  | Update Workers Comp Policy if Applicable | |  |  | |