



2026 COMPLIANCE CONFIDENCE CALENDAR

JANUARY

Compliance & Payroll

- Issue W-2s & 1099-NEC to workers by Jan 31, and file with SSA/IRS by Feb 2
- File Form 940 (FUTA): due early February
- Update minimum wage rates, payroll tax tables, and labor law posters
- Reconfirm benefits deductions (401k, FSA, HSA)
- Refresh required harassment training where mandated

HR Operations

- Reconcile PTO balances & reissue updated handbook
- Update org chart, KPIs, and employee contact info
- Set Q1 goals & expectations if not completed

FEBRUARY

Compliance & Payroll

- Post OSHA Form 300A (Feb 1)
- Extended Form 940 deadline (~Feb 10, if timely deposits were made)
- Paper 1099-MISC filing deadline Feb 28 (or next business day)
- Verify 401(k)/Simple IRA contribution schedules

HR Operations

- Conduct internal I-9 audit
- Clean up employee files & certifications
- Review timekeeping accuracy
- Q1 financial & insurance check-ins

MARCH

Compliance & Payroll

- Submit OSHA 300A electronic data by March 2
- Distribute 1095-B/1095-C to employees by March 2
- File ACA forms 1094/1095 electronically (Due March 31)
- S-Corp & Partnership tax returns (Due: March 15)
- CMS Medicare Part D Creditable Coverage Disclosure (Due around March 1)
- Common FSA prior-year claim deadline (plan-dependent, often March 31)

HR Operations

- Q1 performance check-ins
- Refresh job descriptions
- Review contractor classifications

APRIL

Compliance & Payroll

- Tax Day: Business & personal returns (April 15)
- Q1 payroll filings: Form 941 & 720 (April 30)
- Remove OSHA 300A posting after April 30
- Review SPD distribution timing with benefits broker for ERISA plans

HR Operations

- Confirm workplace posting compliance
- Conduct employee sentiment pulse check
- Plan Q2 budgets & staffing

MAY

Compliance & Payroll

- Form 990 for nonprofits (May 15)
- Begin Form 5500 preparation for calendar-year plans
- Mid-year benefits utilization & FMLA/leave audit

HR Operations

- Refresh harassment/anti-discrimination training
- Manager training: documentation & coaching
- Reassess remote work & equipment policies
- Prep mid-year reviews

JUNE

Compliance & Payroll

- RxDC Prescription Drug Data Reporting (Due: June 1)
- Audit payroll accuracy, PTO liability, and leave usage
- Start reviewing Q4 benefits renewal options

HR Operations

- Full mid-year performance reviews
- Update documentation & coaching notes
- Review compensation equity & ranges
- Strategy mid-year reforecast

PRIORITY GOALS

- Reinforce clarity around roles and expectations.
- Build manager confidence in coaching and documentation.
- Tighten compliance foundations and clean up processes.
- Improve hiring workflows and candidate quality.
- Reinforce culture, communication, and accountability.
- Align people operations with quarterly business goals.



2026

COMPLIANCE CONFIDENCE CALENDAR

JULY

Compliance & Payroll

- Form 5500 deadline for calendar-year plans (July 31)
- Q2 payroll filings: 941 & 720 (July 31)
- PCORI fee for self-funded plans (July 31)
- Check for mid-year labor law poster updates
- Review workers' comp accuracy

HR Operations

- Update handbook addendums
- Review EEO-1 obligations (if applicable)
- Prep for comp benchmarking

AUGUST

Compliance & Payroll

- VETS-4212 filing window opens (Aug 1) for federal contractors
- Mid-year compliance check: policies, onboarding, files
- Validate benefit deductions & FSA/HSA balances

HR Operations

- Plan fall/winter recruiting
- Audit performance documentation
- Update job postings & salary ranges

SEPTEMBER

Compliance & Payroll

- VETS-4212 filing deadline: Sept 30
- Summary Annual Report (SAR) due Sept 30 (or Dec 15 with Form 5500 extension)
- Q3 estimated tax payments (Sept 16)
- Next-year FSA plan design changes due (Sept 30)
- Review 401(k) nondiscrimination testing needs

HR Operations

- Full annual compliance audit (I-9s, handbook, files)
- ADA accommodation review
- Prep for annual performance cycle
- Draft 2027 HR strategy & comp planning

OCTOBER

Compliance & Payroll

- Provide QSEHRA notice ~90 days before new plan year (early October)
- Launch FSA/benefits open enrollment (commonly Oct–Nov)
- Medicare Part D creditable coverage notices due by Oct 15
- Q3 Forms 941 & 720 due Oct 31

HR Operations

- Kick off annual performance reviews
- Manager calibration & standards training
- Prep PTO/holiday scheduling
- Finalize Q1 2027 hiring plan

NOVEMBER

Compliance & Payroll

- Safe Harbor 401(k) design notices (early Q4 deadlines)
- Remind employees to submit FSA receipts
- Prepare year-end payroll reporting
- Finalize bonus & raise recommendations

HR Operations

- Finalize performance ratings
- Document all high-risk cases before year-end
- Workplace safety review
- Year-end planning meeting with leadership

DECEMBER

Compliance & Payroll

- Distribute Safe Harbor, QDIA & automatic enrollment notices (Dec 1)
- FSA enrollment deadlines (plan-dependent, usually Dec 31)
- Gag Clause Prohibition Compliance Attestation by Dec 31
- Run final payroll; verify W-2/1099 readiness
- PTO carryover or payout decisions

HR Operations

- Issue written raise/bonus confirmations
- Finalize performance documentation
- Set Q1 expectations for 2027
- Update employee files & certifications
- Archive expired documents

PRIORITY GOALS

- **Prepare for performance reviews and year-end decisions.**
- **Level up consistency in feedback and documentation.**
- **Strengthen engagement and prevent burnout before Q4.**
- **Finalize comp, benefits, and staffing plans for 2027.**
- **Close compliance gaps and update policies.**
- **Celebrate wins and reinforce team alignment.**