Holiday Season Shutdown 2022/23: A Checklist for HR and Payroll Managers

The end-of-year holiday season is a time to regroup and recharge after another busy year. But for HR and Payroll professionals, there is a lot of planning required before the year comes to a close.

In this handy checklist, we've identified the key areas that HR and Payroll managers in Australia may need to consider to ensure business continuity during the end-of-year shutdown period. This list is not exhaustive and contains best practice reminders, rather than legal obligations, to help you prepare for a smooth shutdown.

Shutdown period preparation

Task	Done
Determine the dates of the shutdown period if you haven't already done so.	☐
Ensure dates are processed in your HR and payroll systems and that public holidays are correct.	☐
Create and circulate the company calendar, showing public holidays, business shutdown dates, and the dates of other important company-wide initiatives that occur in the lead-up to the shutdown, such as any end-of-year celebrations.	☐
Communicate the process for requesting leave over the shutdown period and any arrangements for employees who do not have enough leave. Set a deadline for managers to approve leave requests.	☐

Rostering / operations

Determine operational needs e.g., which departments can shut down fully and which require skeleton staff planning?	☐
Plan and prepare skeleton staff schedules and provide contact details of relevant persons in case of emergency.	☐
Finalise seasonal hires and acquisitions and organise group inductions (especially important for sectors like retail which will typically see a rise in staffing needs over the holiday season).	☐
Finalise rosters in advance and have backup lists detailing availability and contact details.	☐
Determine and communicate any technology outages / blackouts to staff and customers.	☐

Recruitment, onboarding and offboarding

Turn off paid job adverts or create automated responses to follow up in January.	☐
Delay new starters due to commence employment shortly before or during shutdown to the first business day of the New Year.	☐
Prepare onboarding schedules for all new starters commencing in January. Ensure if managers are on extended leave, another team member is available to welcome new starters. Streamline your onboarding process with the help of technology. ELMO Onboarding enables users to build great pre-boarding & onboarding journeys that eliminate paperwork, while improving the employee experience and productivity from day one.	☐

Ensure all relevant onboarding paperwork for new starters is completed as a matter of urgency to ensure payment to these employees is not delayed.	☐
Communicate key information for the first day back (e.g., information regarding new starters, workplace logistics, work-from-home policies etc.)	☐
Ensure office equipment and hardware is retrieved from employees departing the company permanently over the shutdown period.	☐

Payroll, finance and the holiday season pay run

Determine when the final year-end pay run will be and advise employees (noting public holidays and office shutdown / payroll team leave).	☐
Determine how end-of-year bonuses will be paid if applicable (i.e. in a separate payroll) and ensure calculations are correct.	☐
If you have any changes to your awards effective 1 January, ensure these are in place and that your time and attendance systems reflect these changes.	☐
Ensure nominated payroll manager and a back-up has login details for banking software.	☐
Ensure any signatories and authorisers taking leave over the end-of-year period have delegates in place.	☐
Remind staff to submit expense claims by a certain date and communicate with payroll / finance to finalise any outstanding claims.	☐
If you plan to pay some of your casual employees in advance, ensure this is determined and aligned throughout your leadership, operations and finance teams. Estimate timesheets and work with payroll to determine how to pay people according to the hours and dates they're going to work.	☐
Ensure payroll team is aware of any employee terminations that may occur prior to or during the shutdown period to avoid overpayment.	☐
Obtain information from your HR, time and attendance, and payroll vendors about their hours, processes, and support staffing arrangements during the end-of-year break.	☐

Engagement activities

Create and circulate a "Year in Review" newsletter or video (e.g. company wins, landmark events from the year, team photographs, etc.)	☐
Put in place employee support for vulnerable staff. Acknowledge that the holiday season can be difficult. Distribute comms to employees with information on how they can access your employee assistance program (EAP) over the end-of-year break.	☐

End-of-year parties – organise celebrations, send out invites, and circulate employee code of conduct policy.	☐
Conduct an employee pulse check or engagement survey and reflect on end-of-year reporting (e.g. burnout levels, diversity metrics, turnover rate etc.). What can be learnt and what should be changed or repeated next year? ELMO Survey takes the hassle out of feedback surveys. With a range of ready-made templates and instant reporting, it's quick and easy to gain actionable insight from your employees.	☐

General

Complete any outstanding projects and tasks.	☐
Create personal New Year goals and objectives. Plan projects / admin for January period which is typically a quieter period.	☐
Activate out-of-office and delete any calendar meetings over the shutdown period (and remind employees to do the same).	☐

Return to work activities and New Year Planning

Review and reschedule regular meetings for 2023.	☐
Plan new compensation plans for 2023 (for those who operate on a calendar year performance and remuneration basis).	☐
Collaborate with the finance team in January to review any scheduled changes to tax laws or superannuation policies. For more information, visit the Australian Taxation Revenue website here.	☐
Plan and arrange any "welcome back" workplace activities and incentives.	☐
Review / update the 2023 training calendar and development objectives.	☐
Prepare employees for promotion cycles / new roles and ensure succession plans or any flight risks are identified.	☐
Review recruitment budget and strategise with department leaders to fill high priority capability gaps.	☐

Disclaimer: *Please note that the information in this checklist is not exhaustive and is intended for general information purposes only. It does not constitute legal or other advice. Always seek professional advice.*

How ELMO can help

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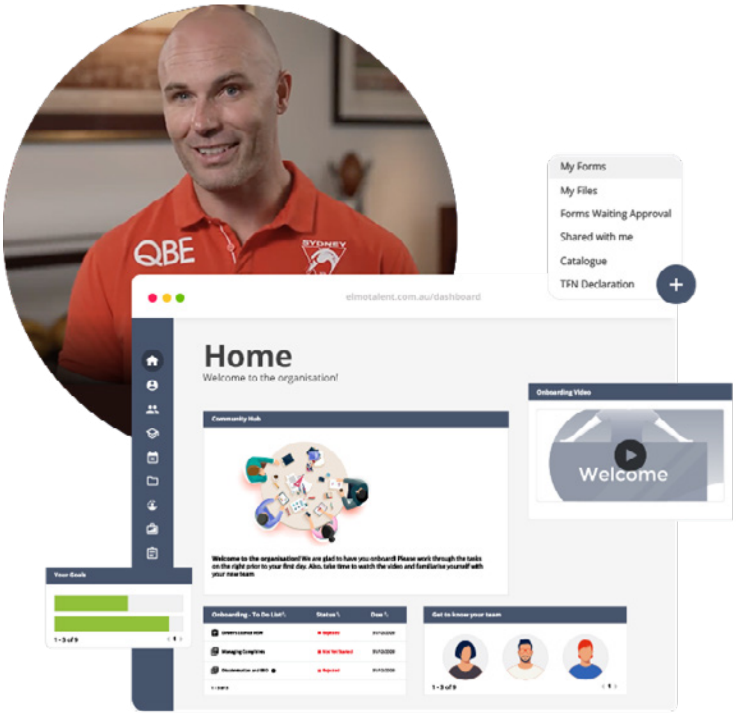

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