

Use this checklist to build a compliant, scalable employee handbook that intentionally drives your company culture. Here's how:

## 1. REVIEW EACH POLICY

For every item listed, ask yourself:

- ☑ Do we already have this policy in place?
- ☑ Do we need to have this policy in place?

## 2. ENGAGE YOUR TEAM

Have key managers / supervisors review the list, asking each of them to consider:

- ☑ Is this policy necessary to protect the company or reduce liability?
- ☑ Does it help create consistency in how we want to build?
- ☑ Could it support or harm the culture we want to create?

## 3. USE THE ACTION COLUMN TO DECIDE

Highlight policies using the Revise / Remove / Add column to reflect your next steps:

red=remove, yellow=revise, green=add

- ☑ **Remove** policies you don't use or can't consistently enforce
- ☑ **Revise** policies that feel outdated or unclear
- ☑ **Add** policies that will reduce confusion or help you grow

## HOW MANY POLICIES DO SMALL BUSINESSES REALLY NEED?

You don't need to cover every scenario.

In fact, **if a policy isn't something you'll consistently follow, enforce, or communicate, it's best left out.** Your policies need to create enough structure to:

- ☑ Define expectations
- ☑ Prevent common misunderstandings
- ☑ Create consistency across decisions
- ☑ Stay legally compliant

### Must-have policies:

1. Employment-at-will statement
2. Equal opportunity
3. Harassment / Retaliation
4. Timekeeping, wages, and overtime
5. Attendance and PTO
6. Standards of conduct
7. Workplace safety and emergency response
8. Technology and device use
9. Disciplinary process
10. Termination guidelines
11. Handbook acknowledgement statement

### Optional policies (if they're relevant):

1. Remote work/telecommuting
2. Dresscode
3. Internet or social media use
4. Drug-free workplace
5. Open-door communication
6. Expense reimbursements
7. Healthcare or retirement benefits

# EMPLOYEE HANDBOOK CHECKLIST



	Yes	No
Do you have an employee handbook?	<input type="checkbox"/>	<input type="checkbox"/>
Is one department or individual responsible for your handbook?	<input type="checkbox"/>	<input type="checkbox"/>
Is that one department or individual:		
Evaluated on the handbook?	<input type="checkbox"/>	<input type="checkbox"/>
Rewarded on the basis of efforts with respect to the handbook?	<input type="checkbox"/>	<input type="checkbox"/>
Do you have stated goals for the handbook, such as:		
Communicating with employees?	<input type="checkbox"/>	<input type="checkbox"/>
Describing your corporate culture?	<input type="checkbox"/>	<input type="checkbox"/>
Stating the company's goals?	<input type="checkbox"/>	<input type="checkbox"/>
Stating the company's ethical standards?	<input type="checkbox"/>	<input type="checkbox"/>
Stating policies to comply with discrimination laws?	<input type="checkbox"/>	<input type="checkbox"/>
Reducing turnover?	<input type="checkbox"/>	<input type="checkbox"/>
Increasing productivity?	<input type="checkbox"/>	<input type="checkbox"/>
Reducing misunderstandings with employees?	<input type="checkbox"/>	<input type="checkbox"/>
Avoiding employment contracts?	<input type="checkbox"/>	<input type="checkbox"/>
Reducing lawsuits?	<input type="checkbox"/>	<input type="checkbox"/>
Is the handbook written in a straightforward and easy-to-understand manner?	<input type="checkbox"/>	<input type="checkbox"/>
Do you review the handbook at least annually:	<input type="checkbox"/>	<input type="checkbox"/>
To ensure it is meeting its goals and supports the organization's culture?	<input type="checkbox"/>	<input type="checkbox"/>
For revisions needed because of policy, legal, or other changes?	<input type="checkbox"/>	<input type="checkbox"/>
Have you requested that your attorney review your handbook?	<input type="checkbox"/>	<input type="checkbox"/>
Do you reserve the right to unilaterally alter your handbook?	<input type="checkbox"/>	<input type="checkbox"/>
Do you have a handbook orientation meeting for all employees?	<input type="checkbox"/>	<input type="checkbox"/>
Do you require employees to sign an acknowledgment stating they received the handbook and all revisions, and that employment is at will?	<input type="checkbox"/>	<input type="checkbox"/>
Do you advise employees to obtain interpretations or clarifications of the handbook from their manager/HR?	<input type="checkbox"/>	<input type="checkbox"/>

## Does the handbook address the following issues:

	Yes	No	Revise/ Remove/Add		Yes	No	Revise/ Remove/Add
Absences / attendance	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Conflict of interest	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Access to personnel files	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Contagious disease policy	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
ADA <small>(42 USC 12102 and 42 USC 12112)</small>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Company equipment & acceptable use	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Affirmative action	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Customer relations	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Benefits	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Discipline / Progressive Discipline	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Bereavement leave	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Discounts for employees	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Bonus pay	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Diversity	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Bulletin boards	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Domestic violence leave	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Business travel	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Dress & appearance standards-	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Call-in pay	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Drug-Free Workplace Act <small>(41 USC 701 et seq.)</small>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Childcare benefits	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Drug testing	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Confidentiality	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Eldercare benefits	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

# EMPLOYEE HANDBOOK CHECKLIST



	Yes	No	Revise/ Remove/ Add		Yes	No	Revise/ Remove/ Add
E-mail and mail	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Orientation Period	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Emergency closings	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Overtime (29 CFR 778.101 et seq.)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Employee assistance program	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Paid time off and vacation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Employee lockers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Parking	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Employment classification	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Pay changes (market adjustments/demotions)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Employment-at-will policy	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Paydays (29 CFR 531.27, 29 CFR 531.35, and 29 CFR 778.103)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Entertainment expenses	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Pay Deductions (29 CFR 531.36, 29 CFR 531.37)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Equal opportunity policy (42 USC 2000e)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Pay methods (direct deposit, paycards, etc.)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Error in pay	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Performance standards and evaluations	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Exempt/nonexempt (29 USC 201; 29 CFR 541)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Personal devices & acceptable use	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Expense reimbursement	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Pregnancy accommodations	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Falsification of employment records	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Reasonable accommodation (42 USC 12112(b)(5))	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Family & Medical Leave Act (29 CFR 825.301)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Record access (42 USC 12101; 29 CFR 825.500, 45 CFR 160.103)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Fighting	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Recording communications (18 USC 2701 et seq.)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Fitness for duty (42 USC 12112(d))	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Reemployment	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Flextime	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Reference requests	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Garnishments (29 CFR 870.1 et seq.)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Resignation & exit interviews	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Harassment (42 USC 2000e)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Rest & meal periods (29 CFR 785.18 and 29 CFR 19)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Hazard communications (29 CFR Sec. 1910.1200(b))	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Retaliation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Holidays	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Retirement	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Hours of work (29 CFR 785.11 et seq.)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Safety and security policy (29 USC 651)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Immigration policy (8 USC 1324a and 8 USC 1324b)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Smoking & tobacco use	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Inclement weather	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Solicitation & distribution policy	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Internet use	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Specific state laws	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Investigations	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Telecommuting	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Job posting	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Termination	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Job sharing	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Timekeeping (29 CFR 516.2)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Jury duty (28 USC 1875) and witness duty	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Use of intoxicants	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Lactation breaks	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Vendor relations	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Layoffs & recalls	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Visitors	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Leave of absence policy	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Voting leave	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Loans	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Work-related injuries	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Media relations	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Work rules	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Medical examinations (42 USC 12112(d))	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Workweek (29 CFR 778.103, 29 CFR 778.104, 29 CFR 778.105)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Military leave	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				
Moonlighting	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				
Moving expenses	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				
Nepotism	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				
Off-duty conduct	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				
On-call pay (29 CFR 785.16 and 29 CFR 785.17)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				
Open-door policy	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				

**NOT SURE ABOUT A NEW POLICY?  
OUR HR EXPERTS HAVE YOUR BACK,  
REACH OUT ANY TIME.**