

EMPLOYEE HANDBOOK CHECKLIST



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- ☑ **Revise** policies that feel outdated or unclear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

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

Does the handbook address the following issues:

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

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

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