Employee handbook planning checklist

A practical organizer for U.S. small-business owners. Gather what is already written, what the team does today, and what still needs an owner decision before drafting.

This is operational planning guidance, not legal advice or legal review.

01 Business and work locations

Business name(s) · Main contact · Date this checklist was started

Business type or services · Teams, departments, or work areas

Work locations: state and city for each office, shop, or regular work site

Other locations: remote, field, client, travel, or temporary sites · Who works where

02 Workforce and work arrangements

Mark	Information to gather
[ ]	Current team size, role names, and the work each role handles.
[ ]	Who supervises each role or team; who is the point person at each location.
[ ]	Work arrangements used today, such as full-time, part-time, seasonal, or changing schedules.
[ ]	Where and how work happens: onsite, hybrid, remote, in the field, or at a client site.
[ ]	Typical work patterns, shift handoffs, and recurring coverage needs.
[ ]	Language, accessibility, or format needs to consider when sharing written information.

Roles, locations, or arrangements that need clarification · Person or source to ask

Collect current information

Use the current documents and day-to-day routine as source material. Note where a written description and actual practice differ so someone can confirm the details.

03 Existing policies and current practices

Mark	Information to gather
[ ]	Current handbook, policy notes, employee forms, templates, and onboarding materials.
[ ]	Who owns each document, where the current copy is kept, and when it was last updated.
[ ]	How the team actually handles common situations, including differences by location or role.
[ ]	Recurring questions employees ask and examples that would make the process clearer.
[ ]	Exceptions or informal workarounds people rely on; who can explain why they happen.
[ ]	Records or systems where related information is stored and who can provide access.

Important document or source to find · Who can provide it · Where it is kept

A current practice to compare with a written document · What needs confirming?

04 Topic notes: pay, time, and leave

Pay and timekeeping

Mark	Information to gather
[ ]	How pay is explained and who can answer questions about the current process.
[ ]	How time is recorded, reviewed, corrected, and handed off for processing.

Schedules and attendance

Mark	Information to gather
[ ]	How schedules are prepared, changed, and shared with the team.
[ ]	How employees currently communicate a late arrival, absence, or schedule request.

Benefits and leave

Mark	Information to gather
[ ]	Benefits or leave information already shared, related contacts, and where details are kept.
[ ]	How employees ask about available benefits or time away; questions that still need an answer.

Gather notes for handbook topics

For each subject, capture existing materials, the current routine, who owns the information, and any question that still needs an answer.

05 Workplace conduct and reporting

Mark	Information to gather
[ ]	Existing guidance or examples about how people work together and raise a concern.
[ ]	Who receives a concern, what happens next, and where follow-up is recorded today.

06 Safety and incidents

Mark	Information to gather
[ ]	Where the team finds worksite, equipment, emergency, or safety instructions.
[ ]	How an incident or near miss is shared, who follows up, and where notes are kept.

07 Technology and confidential information

Mark	Information to gather
[ ]	Systems, devices, accounts, and tools employees use for work.
[ ]	Who handles access changes and where current guidance about records or private information lives.

08 Performance and feedback

Mark	Information to gather
[ ]	How check-ins, coaching, feedback, and performance conversations happen today.
[ ]	What examples or follow-up notes are kept, and who is responsible for the next step.

09 Onboarding

Mark	Information to gather
[ ]	Tasks and materials used before a start date, on the first day, and during the first weeks.
[ ]	Who coordinates access, training, introductions, and early check-ins.

10 Separation and transitions

Mark	Information to gather
[ ]	How work, records, access, equipment, and in-progress tasks are handed off.
[ ]	Who coordinates transition steps and what information the team needs to close out.

Record decisions and open questions

Keep unresolved details visible. Assign an owner or source for each question before turning notes into draft language.

11 Owner decisions to record

Mark	Information to gather
[ ]	Who the handbook is for and which roles, teams, and locations it will describe.
[ ]	Who will coordinate the draft and gather input from managers or team members.
[ ]	How people will find the handbook and where the current version will be kept.
[ ]	Who will maintain the document and when the owner wants to review it again.
[ ]	Topics where practices differ and which owner will decide how to describe them.

12 Open questions or missing information

Question or missing detail · Person or source that can answer · Follow-up date

Question or missing detail · Person or source that can answer · Follow-up date

Question or missing detail · Person or source that can answer · Follow-up date

13 Before drafting the first pass

Ready for a first draft?

Mark	Information to gather
[ ]	Current documents and source locations are gathered or listed as missing.
[ ]	Actual practices and differences by role or location are noted.
[ ]	An owner is assigned to each open question or decision.
[ ]	The person coordinating the first draft and next check-in are identified.

Additional notes · Next step and owner

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