

Handbook Preparation Checklist

To create a new handbook or update an existing version CLEAR should know the following:

General Company Information

- Company name
- Company logo (optional)
- Hours of operation
- Length of a workweek (e.g., 40 hours)

Type of Company

- If the client is a federal contractor subject to the Drug Free Workplace Act
- If the company is a health care facility
- If the company is a retail establishment

General Employee Data

- State(s) in which employees work
- # of employees working in each state
- # of employees working in:
 - Seattle;
 - New York City;
 - any of the following California locations: Emeryville, Oakland, San Francisco;
 - Portland, OR; and/or
 - any of the following New Jersey locations: Bloomfield, East Orange, Irvington, Jersey City, Montclair, Newark, Passaic, Paterson, Trenton
- Employee classifications (e.g., who is entitled to paid holidays and bereavement leave)
- If employees are covered by a collective bargaining agreement

Key Personnel Information

- Name of the president or CEO
- Person (position title) who handles EEO complaints
- First and second person (position titles) who handle harassment complaints
- Person (position title) who handles benefits questions
- Person (position title) who handles employee personnel records
- Person (position title) who handles media inquiries
- Person (position title) who processes reimbursable business expenses
- Person (position title) who handles payroll questions

Pay and Performance Management

- If there is a trial period for new employees, how long it lasts and if it's followed by a performance review
- If the company offers an employee service credit
- Pay frequency
- Employee review frequency
- If the company uses progressive discipline
- How much notice the company requires before resignation

Leave

- Paid holidays
- If paid time off is consolidated or if there are separate policies for vacation, personal leave and sick leave
- If the company has more than 50 employees or expects to in the next six months
 - ☐ Questions related to Family & Medical Leave Act (FMLA):
 - Title of position responsible for answering FMLA-related questions.
 - Method company uses to determine 12-month period for unpaid FMLA leave.
 - Whether company requires employees to use accrued paid time off before FMLA leave.
 - Whether company allows employees to use accrued paid time off to supplement paid disability benefits.
 - Method employees must use to pay their portion of group health premiums while on unpaid FMLA leave
 - Whether company will cancel health insurance if employee doesn't pay premiums while on FMLA leave
 - If highly compensated employees are excluded from the FMLA policy

Certain Policy Considerations

- If the company permits reasonable alcohol consumption at business meetings and social events
- If the company allows personal use of email and computer systems
- If the company restricts employee usage of company communications and computer systems to non-working time
- If the company prohibits the carrying of weapons on company property

Locality-specific Information

- For Massachusetts:
 - Work address and phone number(s) of contacts to whom employees should direct complaints about sexual harassment.
 - Title of the individual that employees should contact to provide notice of the need to use accredited sick time.
 - Title of position that employees should contact w/ questions re Earned Sick Time
- For Seattle Sick/Safe Leave: title of position that should contact w/ questions.

Other Policies [optional]

- Unacceptable Job Performance/Disciplinary Action
- Bereavement
- Jury duty (mandatory if 15+ employees)
- Rehiring of past employees (in addition to service credit)
- Background Checks and drug tests
- Inclement weather policy
- Emergency plan
- Education Assistance plan
- Telecommuting policy
- Any other policies or regulations that are specific to your organization