



IN THE BUSINESS OF YOUR SUCCESS®

## Employee Handbook Set-Up Preparation Guide

To create your Employee Handbook, you will need to provide some basic information about your company. You can collect this information in preparation for your handbook set-up session and have it handy during the call.

### General Company Information

This information will form the foundation of your entire handbook. Be thorough and accurate in the information you provide and update this data when it changes.

Employee Handbook Set-Up Field	Enter your response
<ul style="list-style-type: none"><li>• <b>Company Name:</b> Type your company name exactly how you want it to appear throughout your handbook. This may be your d.b.a name or other way in which you wish to refer to your brand.</li></ul>	<hr/>
<ul style="list-style-type: none"><li>• <b>Common Name:</b> This is how your company will be referred throughout the handbook when the proper name isn't used (e.g, agency, firm, company, organization).</li></ul>	<hr/>
<ul style="list-style-type: none"><li>• <b>HR Contact:</b> We recommend using the title of your HR representative (e.g., Office Manager, Human Resources Manager, etc.) rather than a person's name.</li></ul>	<hr/>
<ul style="list-style-type: none"><li>• <b>Number of Employees:</b> Employment laws vary based on employer size. Accurate data is important for ensuring all relevant policies are included in your employee handbook. As your employee size fluctuates, it's important to update this information in the Employee Handbook Wizard.</li></ul>	<hr/>
<ul style="list-style-type: none"><li>• <b>State(s) of Operation:</b> If you expand your operations into additional states or move your business elsewhere, it's important to keep this information up to date. Since laws vary by jurisdiction, this information will help dictate which policies are included in your employee handbook.</li></ul>	<hr/>

You should also be familiar with your company's:

#### Working Conditions

- Your company's dress code policy
- How parking is handled

#### Hours and Pay

- Your company's standard workweek
- The frequency in which employees are paid

#### Company Benefits

- The benefits your company offers and which employees are eligible

If you have questions about any of the above, you can discuss them during your session.

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