

Handbook Questionnaire – To be completed by the Client, and returned to SPMI

As a “Human Resource Outsourcing Company”, we believe our primary duty to you is to provide services necessary to run your business in the most professional way possible. “Employee Handbooks” are just one of the many services provided to you to assure compliance with federal and state laws and to protect you from avoidable misunderstanding among the employees of your company.

As a new Client with SPMI, we are asking for your assistance in developing an “employee handbook” that is tailored to your business. Information such as vacation pay, sick day policies, dress code, restricted areas, etc., is unique to each of the employer companies within SPMI. You will be forwarded a copy of the completed handbook for your approval prior to printing.

Client name for Handbook if different than legal name given to SPMI

What are your normal business hours and work shifts

What is your pay schedule and when does your workweek begin and end?

Does the company provide paid vacation?

Yes ☐
No ☐

When are employees eligible for this vacation time?

How many days vacation do they earn per year?

How does an employee request time off?

Who has authority to approve the request?

Are employee’s allowed to save unused vacation time?

Yes ☐
No ☐

How is unused vacation time treated when an employee terminates with notice?

How is unused vacation time treated when an employee terminates without notice?

If unused time cannot be carried over, is it paid for or forfeited?

Are there any limits to the amount of vacation time that can be taken at one time?

Does your company provide holiday pay to your employees?

Yes ☐
No ☐

If yes, at what rate of pay?

Are there work requirements that must be met before an employee receives holiday pay (i.e. Must work the day before and after a holiday, etc.)?

Which holidays are paid?

Yes___ No___ New Years Day
Yes___ No___ Memorial Day
Yes___ No___ Independence Day
Yes___ No___ Labor Day
Yes___ No___ Thanksgiving Day
Yes___ No___ Friday following Thanksgiving Day
Yes___ No___ Christmas Day
Yes___ No___ Day before or after Christmas Day
Other Holidays not listed:

Which holidays are unpaid?

How are holidays and holiday pay handled if the holiday falls within a weekend or vacation?

Are there specific guidelines as to how many days an employee can be tardy?

Yes ☐
No ☐

If yes, what are these guidelines?

Absent?

Yes ☐
No ☐

If yes, what are these guidelines?

What is considered an excused absence and does not count against an employee's attendance record?

How many days can employees be absent or tardy from work before receiving corrective action? ___ How many days can they be absent without calling in before disciplinary action, up to and including termination? ____

Does your company offer any personal time off?

Yes ☐
No ☐

Is it paid or unpaid? _____

What is your company policy on sick days and procedures to notify company when ill:

Does your company provide any paid medical leave?

Yes ☐
No ☐

Does your company provide Funeral Leave or Bereavement Pay?

Yes ☐
No ☐

If yes, how many days paid? _____ How many days unpaid? _____ What form of proof is required? Please list who is considered family to receive payment (use the back if needed).

Are any benefits paid by the company?

Do you have an introductory period for new employees?

Yes ☐
No ☐

If so, how long? _____

Is their job performance formally evaluated at the end of this introductory period?

Yes ☐
No ☐

Are performance evaluations routinely done throughout their employment?

Yes ☐
No ☐

Is a written copy of evaluations kept on file?

Yes ☐
No ☐

Is a copy provided to the employee?

Yes ☐
No ☐

Would you like a brief history or explanation of your business included?

Yes ☐
No ☐

If so, please provide the information below or on a separate sheet of paper.

Would you like to include your company's vision or mission statement?

Yes ☐
No ☐

If so, please provide the information below?

After completing the above, please review the following recommended Employee Handbook policies. The policies that are mandated by Federal Law are checked "YES" and are automatically included in the Handbook of the Client. Check "YES" by any other policies that you want to address in your Company's Employee Handbook. All Policies are recommended.

If you have specific company policies that SPMI will need to address or have any questions, please contact the Human Resource Department of SPMI at 474-7752 or email tammy@spmih.com or jon@spmih.com for further assistance.

Recommended Contents

1 Introduction

- 1.1 Welcome Yes___
- 1.2 Vision and Mission Statements Yes___
- 1.3 Changes in Policy Yes___
- 1.4 Business Hours Yes___

2 Employee Definitions and Status

- 2.1 Full-Time Employees Yes___
- 2.2 Part-Time Employees Yes___
- 2.3 "Non-Exempt" and "Exempt" Employees Yes___
- 2.4 Introductory Period for Employees Yes___
- 2.5 At Will Employment Yes___

3 Employment Policies

- 3.1 Equal Employment Opportunity Yes_√_
- 3.2 Americans with Disabilities Act Yes_√_
- 3.3 Immigration Law Compliance Yes_√_
- 3.4 Employee Background Check Yes___
- 3.5 Criminal Records Yes___
- 3.6 Anniversary Date Yes___
- 3.7 New Employee Orientation Yes___
- 3.8 Personnel Records and Admin Yes___

3.9 Safety Yes___

3.10 Building Security Yes___

3.11 Personal Property Yes___

3.12 Health-related Issues Yes___

3.13 Employee Requiring Medical Attention Yes___

3.14 Visitors in the Workplace Yes___

3.15 Employment of Relatives Yes___

3.16 Weather-related Closings Yes___

4 Standards of Conduct

4.1 General Guidelines Yes___

4.2 Work Schedule Yes___

4.3 Absence and Lateness Yes___

4.4 Unscheduled Absence Yes___

4.5 Meal and Break Periods Yes___

4.6 Harassment Policy Yes___

4.7 Violence in the Workplace Yes___

4.8 Confidential Information Yes___

4.9 Dress Code Yes___

4.10 Use of Computer, Phone and Mail Yes___

4.11 Use of Internet Yes___

4.12 Personal Electronic Devices Yes___

4.13 Use of Computer Software

Yes___

4.14 Smoking Policy

Yes___

4.15 Drug Free Workplace

Yes___

4.16 Solicitations and

Distributions

Yes___

4.17 Outside Employment

Yes___

5 Compensation Policies

5.1 Timekeeping Procedures

Yes___

5.2 Deductions (Mandatory)

Yes_√_

5.3 Deductions (Other)

Yes___

5.4 Garnishments

Yes___

6 Benefits

6.1 Benefits Summaries and

Eligibility

Yes___

6.2 Health Insurance

Yes___

6.3 Dental Insurance

Yes___

6.4 Vision Insurance

Yes___

6.5 Disability Insurance

Yes___

6.6 Life, Accidental Death, and

Dismem

Yes___

6.7 COBRA Notification

Yes_√_

6.8 Pre-Tax Deductions for

Employees

Yes___

6.9 Workers' Compensation

Yes_√_

6.10 Unemployment

Compensation

Yes_√_

6.11 Social Security

Yes_√_

6.12 Retirement Plans and Stock

Options

Yes___

6.13 Educational Assistance

Yes___

6.14 Training and Professional

Develop

Yes___

6.15 Credit Union

Yes___

7 Time-Off Benefits

7.1 Holiday Policy

Yes___

7.2 Vacation Time

Yes___

7.3 Sick Leave

Yes___

7.4 Bereavement Leave

Yes___

7.5 Jury Duty

Yes_√_

7.6 Election Day

Yes_√_

7.7 Military Reserves or National

Guard

Yes_√_

7.9 Personal Leaves of Absence

Yes___

8 Expenses

8.1 Introduction

Yes___

8.2 Company Supplies, Other

Expenditures

Yes___

8.3 Expense Reimbursement

Yes___

Here are some other policies you might consider including in your Employee Handbook. Just check the Policies that you are interested in:

- Yes___ Annual Physical Exam
- Yes___ Check Cashing Privilege
- Yes___ Contests/Incentive Programs
- Yes___ Flu Shots, Etc.
- Yes___ Identification Badges
- Yes___ Lost & Found
- Yes___ Notary Public
- Yes___ Organization Memberships
- Yes___ Overtime Pay for Certain Managers
- Yes___ Meal Stipend
- Yes___ Uniform Cleaning/Repair
- Yes___ Non-Fraternization Policy
- Yes___ Nepotism
- Yes___ Uniforms
- Yes___ Possession of Firearms/Weapons
- Yes___ Non-Disclosure Agreements
- Yes___ Employee Assistance Programs
- Yes___ Arrests and Convictions