

EMPLOYEE HANDBOOK

Case IQ

Welcome

HOW TO USE THIS TEMPLATE

This employee handbook template contains more than 50 sections that can be edited, rewritten, replaced or adapted to meet the needs of your company. Each section contains a brief instruction, which you can delete, followed by an example of the text you may wish to include in the section. The table of contents can be updated to reflect any changes you make in the document. The footer in the document contains the Case IQ logo. This is editable and can be replaced with your own company logo, alternate text, or nothing at all.

WRITING YOUR CODE OF CONDUCT

Here are some resources to help you write your employee handbook.

Before you begin:

1. Read Our Relevant Articles:

- [53 Things to Include in Your Employee Handbook \(and Other Helpful Tips\)](#)
- [18 of the Best Code of Conduct Examples](#)

2. Download Complementary Templates & Forms:

- [The Ultimate Directory of Free HR Templates & HR Forms](#)

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I. MESSAGE FROM THE CEO

This is the preface, ideally written from the CEO personally.

Say hello to the employee and thank them for coming aboard. Briefly introduce the company and yourself. Explain the reasoning behind the handbook: why it exists and why it's been given to them today.

For example:

Welcome to Company Name, we're happy you're here.

I founded the company in Year because Reason, but we'll get more into that later.

We developed this Employee Handbook to get you acquainted with Company Name, what we do, why we do it and how you fit into the big picture. This is probably your first day, so your main priority is to be a sponge and soak up all the information coming your way.

Not only will this Employee Handbook get you familiar with Company Name, it's also meant to be a useful tool for the future. The goal of this book is to contain all the relevant information you need to know now and for years to come. Again, thank you for joining us on this journey. Welcome to the team.

Name

Position

II. DISCLAIMER

Include a disclaimer to explain that the handbook is neither a contract nor a promise of employment.

For example:

The purpose of this Employee Handbook is to provide employees with general information and guidelines. It is in no way a legal contract, and your employment with Company Name may be terminated or resigned from at any time.

III. COMPANY PROFILE

HISTORY

Introduce (in more detail now) where the company came from and how it has evolved.

For example:

Company Name actually started out as a shoe-shining company...Talk about humble beginnings, huh?

Back in the 80s, Founder 1 and Founder 2 were political science students by day and entrepreneurs-in-the-making by night. The duo made a pact to think of one business idea every day until something stuck. Then, one fateful night in Year, it came to them.

CORE VALUES

Provide an explanation of the company's core beliefs and values.

For example:

- Honesty, integrity and trustworthiness.
- Courage, respect for others and responsibility.

MISSION

Provide information about what the company does, who it serves and why it exists.

For example:

- We strive to improve the health of individuals across the world with our organic food options.
- To connect artists with the venues that need them.
- To create environmentally-sustainable and socially-conscious products that consumers will feel good buying.

VISION

Outline where the company hopes to go.

For example:

- To connect the world in a sustainable way with affordable electric vehicles.
- A poverty-free America.
- Striving to transform communities by delivering organic food necessary for a healthy and productive life.

GOALS

Emphasize specific company goals.

For example:

Year-over-year, we are aiming to:

- Make 20% more trips.
- Reach an average approval rating of 75%.
- Double the number of sales made through the online store.

CULTURE

Inform employees what they should expect in terms of company culture, behavior and norms.

For example:

Here at Company Name, we put the customer first and our team second. We embrace comfortability and collaboration which is why there are no set desks and employees are free to move among the different teams and floors. This is also why we work hard to organize monthly team activities that you'll actually want to attend.

IV. ORIENTATION & FIRST DAY

FORMS

Distribute all the important forms, documents and paperwork for new employees to complete.

For example:

Attached you will find the following forms:

- Federal and state tax forms
- Personal and emergency information forms
- Direct deposit form

Please fill out all of the attached by the end of your first week and bring to Name's office.

DRESS CODE

Inform the employee about the company's dress code.

For example:

In keeping with Company Name's casual environment, we've chosen not to apply a strict dress code. We trust that all employees are able to recognize when a more formal attire is necessary (for example: meeting with clients or giving a presentation) and when a more relaxed and informal outfit is acceptable.

PARKING

Explain the company's parking situation.

For example:

Company Name offers parking in the lots located at Address for \$\$ per month. If you wish to obtain a spot, send an email to Name indicating when you would like your parking to begin and how you wish to pay (direct deposit is the norm however cash or check is accepted as well).

IDENTIFICATION

Explain office security procedures and the use of identification cards (if applicable).

For example:

All employees (even part-time, seasonal, interns and volunteers) must carry their Employee Identification card at all times. Security personnel may ask for your Employee Identification card at any point to confirm your employment. Due to the nature of our business and the importance of data security, employees must scan their keycards to access the office, any of the floors and the elevators.

V. HEALTH & SAFETY

SAFETY PROCEDURES

Inform new employees workplace safety procedures and provide existing employees with a place to refer to for information.

For example:

Company Name conducts business in accordance with applicable health and safety requirements and strives for continuous improvement in its health and safety policies and procedures.

All employees are expected to perform their work in compliance with applicable health and safety laws, regulations, policies and procedures and apply safe work practices at all times in all locations. Please familiarize yourself with the procedures in place.

EMERGENCY PROCEDURES

Explain workplace emergency procedures (what to do in the case of a fire, workplace violence, a natural disaster, etc.).

For example:

If you hear a fire alarm, the first step is to keep calm. The elevators in this office will be out of service and employees will need to exit using the closest stairwell. There are two stairwells, the first by the Location and the second is on the other side of the building near the Location. Remember to meet at the Muster Point sign (found on the other side of the Location).

ADDITIONAL INFORMATION

Direct employees to a place where they can find more details.

For example:

Go to www.website.com where you can download and print off a map of the office's emergency exits. Also available on the website is an up-to-date list of the members of our Occupational Health and Safety team, as well as employees trained in first aid.

COMPANY VEHICLE

Explain the standard procedure for reporting collisions that involve a company vehicle.

For example:

Company Name expects all company vehicle owners to operate the vehicle safely and responsibly. Employees must obey federal and state laws relating to the use of vehicles. Company Name has a zero-tolerance policy and has the right to withdraw vehicle ownership at any time.

Employees are to fill out company vehicle sheets on a weekly basis and report any and all incidents involving a company vehicle.

VI. CLASSIFICATIONS & SCHEDULES

CLASSIFICATIONS

List and define all applicable employment classifications.

For example:

- Full-time
- Part-time
- Temporary
- Seasonal
- Contractor

OVERTIME

Outline the company's overtime policy. This is usually strictly regulated by federal or state laws, so check out those first.

For example:

Unless exempt [from the Fair Labor Standards Act (FLSA)], employees covered by the Act must receive overtime pay for hours worked over 40 in a workweek at a rate not less than time and one-half their regular rate of pay.

WORK HOURS

Explain the typical company schedule including flexible hours and work from home policies.

For example:

Company Name is proud to offer flexible work hours for our employees. Our core business hours are 9am-5pm however the office building will be open for work between 7am and 7pm for those who have obligations before or after work.

Company Name also offers work from home opportunities for employees whose job role does not require them to be in the office regularly. Please talk to your direct supervisor for more information about working outside the office.

DAILY BREAKS

Provide information about lunch and rest breaks.

For example:

For part-time employees, we provide the following break schedule:

- If you work 4 or 5 hours, you will receive one unpaid 15-minute break.
- If you work 6 or 7 hours, you will receive one paid 30-minute lunch break.
- If you work 8 hours or more, you will receive one paid one-hour lunch break.

ATTENDANCE POLICY

What happens if an employee strays from standard hours (coming in late or leaving early).

For example:

Company Name offers unlimited sick days and unlimited time off for appointments. We do this to be flexible and accommodating because we realize our employees have lives outside of the office too. However, employees determined to be taking advantage of this accommodation will be dealt with on a case-by-case basis.

VII. COMPENSATION & BENEFITS

PAY

Outline how and when employees will receive their paycheck.

For example:

Employees are paid on the 15th and 30th of every month. If either of those dates fall on a Saturday, your paycheck will be directly deposited into your bank account on the Friday. If they fall on a Sunday, pay will be distributed on the Monday.

INSURANCE BENEFITS

What insurance benefits do you offer and who will receive these benefits?

For example:

For full-time employees who have completed their 90-day probationary period, Company Name is happy to provide health, dental, vision and life insurance for employees and their dependents.

RETIREMENT PLANS

Explain any benefits offered relating to retirement including contributions or pensions.

For example:

At this time, Company Name matches employee 401(k) plan contributions. From the Department of Labor website, a 401(k) plan is a: “defined contribution plan that is a cash or deferred arrangement. Employees can elect to defer receiving a portion of their salary which is instead contributed on their behalf, before taxes, to the 401(k) plan...There is a dollar limit on the amount an employee may elect to defer each year.”

BONUSES

Outline the bonuses or incentives offered by the company.

For example:

Company Name offers Christmas bonuses to all of our employees. The bonus will depend on the employees' current salary and the rating received on their annual professional performance review.

ADDITIONAL PERKS

Outline any additional perks for employees.

For example:

On their one-year anniversary with Company Name, full-time employees will receive an allowance of \$1000 per year for work-related training or education. It is up to the employee's direct supervisor to evaluate relevancy and approve or deny requests for training, education and workshops.

EMPLOYEE RESOURCES

Provide information about mental or physical health resources available for employees.

For example:

Company Name is proud to offer a completely free Employee Assistance Program for employees and their families who need mental health help, advisory services or counseling services. The program is provided off-site to give employees respect and privacy.

VIII. LEAVE

HOLIDAYS

Provide a complete list of public, federal, state and religious holidays the company observes.

For example:

Full-time employees will receive the following public holidays off with pay:

- New Year's Day (January 1)
- Martin Luther King, Jr. Day (January 15)
- George Washington's Birthday (February 19)

PAID TIME

Inform employees about policy on paid time off.

For example:

Company Name offers full-time employees two-weeks paid vacation (accrued monthly). For every year of service, employees receive two additional paid days off.

SICK TIME

Inform employees about policy on sick days.

For example:

Company Name offers unlimited sick days to our employees. To ensure this program does not get abused, employees absent for more than three days due to illness are required to provide a written doctor's note to their manager. Patterned (every Friday before a long weekend) or consistent sick days will be dealt with on a case-by-case basis.

PERSONAL & FAMILY LEAVE

Inform employees about policy on personal and family days off.

For example:

Please note employees are also covered under the Family and Medical Leave Act (FMLA): The FMLA entitles eligible employees of covered employers to take unpaid, job-protected leave for specified family and medical reasons with continuation of group health insurance coverage under the same terms and conditions as if the employee had not taken leave.

OTHER LEAVE

Inform employees about other days they're entitled to have off.

For example:

- Bereavement leave
- Jury duty
- Voting

IX. PERFORMANCE

ASSESSMENT

Indicate company-wide key performance indicators of success.

For example:

Closely monitoring performance of employees and the company as a whole is our priority. Employee performance assessments will be loosely based on the company-wide key performance indicators (KPI). This year, our focus as a company and therefore for employees too is on autonomy, leadership and innovation.

REVIEW

Inform employees about company expectations for performance reviews.

For example:

At Company Name, we believe that quarterly reviews are too frequent to be an accurate indicator of success. For this reason, we prefer to conduct annual performance reviews. Reviews must be booked a minimum of two weeks in advance to give the employee fair time to review their year.

GRIEVANCE

Explain company policy for filing a grievance regarding performance assessments or reviews.

For example:

If you feel your performance assessment or review was unfairly conducted or inaccurate, and you would like a third-party to investigate the situation, please fill out a Form and return it to Name.

X. APPROPRIATE USE

APPROPRIATE USE OF TELEPHONE

Explain “appropriate use” of company telephones (both mobile and landline).

For example:

Mobile devices issued by Company Name are intended to be used for business purposes only. We reserve the right to monitor device use and review mobile phone bills to confirm proper use. This includes cellular phones and tablets.

APPROPRIATE USE OF COMPANY EQUIPMENT

Explain “appropriate use” of company equipment, including electronics.

For example:

Company Name requires all employees to protect its assets. All assets should be used for legitimate purposes, efficiently, and for company business only.

Assets include facilities, equipment, computers and information systems, telephones, employee time, confidential and proprietary information, corporate opportunities and company funds.

Suspected incidents of fraud, theft, negligence, and waste should be reported to the VP Operations.

APPROPRIATE USE OF INTERNET

Explain “appropriate use” of the Internet (both inside and outside of the office).

For example:

The company understands that occasional personal use of the internet during work hours is a reasonable request and allows this, within reason. Employees can ask for clarification from their managers if in doubt. However, the company does not allow internet use to support a personal business or political venture, or to embarrass the company and its customers.

APPROPRIATE USE OF EMAIL

Explain “appropriate use” of company email accounts.

For example:

Employees are accountable for any information they publish or send online including emails. Please do not use company email accounts to send personal emails, especially those that include inappropriate or sensitive material.

XI. CONDUCT & COMPANY POLICY

CONDUCT POLICIES

Include conduct- or behavior-related policies that demonstrate how the company expects employees to behave.

For example:

- Anti-harassment policy
- Anti-discrimination policy
- Anti-theft policy
- Drug and alcohol use policy
- Code of conduct
- Fraternalization policy

REPORTING

Explain company procedures for reporting inappropriate conduct or behavior.

For example:

Company Name offers an ethics hotline available 24/7 for employees to file complaints about inappropriate behavior or conduct. The hotline is available through an online form at Website and also by phone at Number.

XII. DISCIPLINE & TERMINATION

DISCIPLINARY PROCESS

Specify what constitutes grounds for disciplinary action and the disciplinary process.

For example:

Company Name follows a three-step disciplinary process: verbal warning, written warning and termination. We use this approach to give employees the time and opportunity to fix their mistakes. However, Company Name reserves the right to skip any of the steps in this process and move directly to termination, if necessary.

RESIGNATION

Explain the proper process for announcing resignation from the company.

For example:

To resign from your position, we ask that employees submit a written two-week (at minimum) notice to their direct supervisor.

EXIT INTERVIEWS

Explain the proper process for exit interviews or other procedures for leaving the company.

For example:

At Company Name, we are always striving to improve. Exit interviews have a proven track record of providing helpful and insightful information about an individual's time with the company. Exit interviews are not mandatory but encouraged to openly discuss areas of improvement.

XIII. GLOSSARY

Maintain a comprehensive, well-updated list of words, acronyms or abbreviations common to the company or industry.

For example:

- Bottom of the funnel: the end of the buying process. The deal is about to close.
- Impressions: the number of times an ad is fetched or appears on a person's screen.
- Tire-kicker: a prospect with no intention or ability to buy.

XIV. AGREEMENT

ACKNOWLEDGEMENT OF RECEIPT

By signing and submitting this page, the reader confirms that it's their responsibility to understand and follow the policies in the document.

For example:

- You have read the entire employee handbook and understand your responsibilities related to it.
- You have had the opportunity to ask questions to clarify any unclear aspects of the handbook.
- You agree to abide by its principles.
- You agree to report any violations of the handbook and to cooperate in any investigations of violations of the handbook.

OTHER AGREEMENTS

Include other agreements that require a signature.

For example:

- Confidentiality agreement
- Non-compete agreement