



HR Health Checklist for Small Business Owners

Know where you stand. Protect what you're building.

INSTRUCTIONS: Check off the boxes for everything you currently have in place. Anything left unchecked is a risk you don't want to ignore.

Hiring & Onboarding

- ☐ Up-to-date job descriptions for every role
- ☐ Formal offer letters with at-will employment language
- ☐ Completed I-9 forms for all employees
- ☐ Clear onboarding process (checklists, welcome email, first-day expectations)
- ☐ Background check & reference policies (if applicable)

Documentation & Policies

- ☐ Employee handbook (signed and dated)
- ☐ Signed acknowledgement of company policies
- ☐ Anti-harassment and discrimination policies
- ☐ Time-off and attendance policy
- ☐ Remote/hybrid work policy (if applicable)

Payroll & Classification

- ☐ All workers are correctly classified (W-2 vs. 1099)
- ☐ Payroll system with tax withholdings and reporting
- ☐ Regular review of wage/hour compliance (overtime, meal breaks, etc.)
- ☐ Labor law posters visible and updated
- ☐ Accurate tracking of PTO, sick leave, and holidays

Performance & Employee Relations

- ☐ Written performance evaluation process
- ☐ Documented warnings or performance issues (if applicable)
- ☐ Termination checklist/process with documentation
- ☐ Exit interview process
- ☐ Employee file organization (confidential, compliant, and up to date)

Compliance & Risk

- ☐ Workers' comp coverage in place
- ☐ Unemployment insurance registered and current
- ☐ EEOC and ADA compliance considered in hiring and discipline
- ☐ FMLA tracking (if 50+ employees or applicable by state)
- ☐ Annual harassment training completed (state-specific requirement)

Risk Score Guide:

✓ 25–20 boxes checked: HR rockstar in the making – just keep it up and fine-tune!

⚠ 19–10 boxes checked: Some key gaps – it's time for a solid HR tune-up.

✗ Fewer than 10 boxes checked: 🚨 High risk! We need to talk yesterday.

If You Checked Fewer Than 20 Boxes...

You could be putting your business at legal and financial risk — but don't stress. I help small business owners like you clean up the chaos and put simple, scalable HR systems in place.

Ready to get compliant and confident?

 17 Book a 1:1 HR Strategy Session – Let's check the rest of these boxes together.