



Employee Handbook Builder

A companion to *DreamSpring's How to Write a Great Employee Handbook*

This template has two parts. Part 1 is a policy planner that tracks what to write, how to order them, and who owns each one. Part 2 is a review calendar to keep the handbook current over time. Fill in the blanks as you work.

PART 1

Policy Planner

1. Assemble your team

Identify everyone who needs to be involved before you start writing.

Internal

- Leadership / founders
-

- HR or operations lead
-

- Staff representative (for clarity check)
-

External

- Legal counsel — required before publishing
-

- Board of directors (if applicable)
-

Where will the handbook live? (shared drive, HR portal, etc.)

How will acknowledgment of receipt be captured? (e.g. DocuSign, HR platform)

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2. Prioritize your policies

Add Phase 2 and 3 as you have bandwidth. Use the Owner column to assign a person to each section — policies without an owner tend not to get written.

Phase 1 — Start here		Phase 2 — Add when ready	Phase 3 — Expand over time
Anti-harassment, safety, at-will		PTO, remote work, benefits, AI usage	Performance, compensation, conduct
Category	Policy / Section	Watch out for	Owner
Phase 1 Anti-harassment	Anti-harassment and discrimination	<i>Requires legal review. Must meet federal, state, and local requirements.</i>	
Phase 1 Safety	Workplace safety policy	<i>OSHA rules vary by industry. Include an incident reporting procedure.</i>	
Phase 1 Employment basics	At-will employment statement	<i>Language varies by state.</i>	
Phase 2 Time off	PTO and attendance policy	<i>Be specific about accrual, rollover, and approval. Vague = conflict.</i>	
Phase 2 Remote work	Remote and flexible work expectations	<i>Define availability and equipment. Ensure measurables, outputs, or hours align with organizational goals or needs.</i>	
Phase 2 Benefits	Benefits overview	<i>Coordinate with your provider. Avoid creating unintended obligations.</i>	
Phase 2 AI and data	Generative AI and data security policy	<i>State which tools are allowed and what data may never enter an external AI tool.</i>	

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2. Prioritize your policies – *continued*

Tip: When a policy becomes complex enough that staff need training to follow it, give it its own section.

Category	Policy / Section	Watch out for	Owner
Phase 3 Performance	Performance review process	<i>Whatever you write down needs to be followed consistently.</i>	
Phase 3 Compensation	Compensation and pay periods	<i>State law governs pay frequency. Include how raises are determined.</i>	
Phase 3 Communication	Communication norms and tools	<i>Especially important for remote/hybrid teams. Define response time expectations.</i>	
Phase 3 Conduct	Code of conduct	<i>Ground this in your values instead of a list of what not to do.</i>	
Add your own			
Add your own			
Add your own			

PART 2

Review Calendar

3. Set your annual review month

Review your handbook at least once a year. If something changes mid-year, update it immediately and communicate the change to staff via email or a team meeting.

Primary annual review month:

Person responsible for scheduling it:

4. Quarterly focus areas

Breaking reviews into quarters makes the work more manageable. Each quarter has a specific focus so nothing gets missed.

Q1 Jan – Mar

ONBOARDING & KEY POLICIES

Is the handbook the first thing new hires see? Is the acknowledgment signature being collected? Revisit anti-harassment, at-will, and any policies that affected new hires in the past year.

Review month: _____ Person responsible: _____

Q2 Apr – Jun

CULTURE & EXPECTATIONS

Review communication norms, remote work policy, code of conduct, and AI usage policy. Do they still reflect how your organization operates? This is also a good time to gather informal staff feedback.

Review month: _____ Person responsible: _____

4. Quarterly focus areas – *continued*

Q3 Jul – Sep

COMPLIANCE & SAFETY

Check for new federal, state, or local legislation since your last review. Safety, leave, pay practices, and AI regulations are the most likely to need updates.

Review month: _____ Person responsible: _____

Q4 Oct – Dec

FULL REVIEW & FEEDBACK

Read the whole document. Look for redundancies, gaps, and anything that no longer matches how your org works. Collect feedback from managers and staff. Communicate planned changes before January.

Review month: _____ Person responsible: _____

5. Also update when:

New legislation	There are new federal, state, or local laws affecting employment, leave, pay, or safety.
Cultural shifts	There are changes in how your team works — new tools, schedules, or work norms.
Training triggers	A policy becomes complex enough that staff need guidance to follow it.
<i>Your trigger:</i>	

For Informational Purposes Only

Legal disclaimer

This template is for planning purposes only and does not constitute legal advice. The final version of your employee handbook must be reviewed by qualified legal counsel before distribution. Do not share the handbook with employees until it has been cleared for compliance with applicable federal, state, and local regulations.