



# The Ultimate HR Checklist



How to Approach  
HR for Continued  
**Growth** & Success

# Explore CoAdvantage's Comprehensive HR Checklist

HR is the backbone of any successful business, and as your company grows, so do the complexities of managing it effectively. When you're only responsible for a handful of employees, juggling benefits, payroll tracking, and other concerns might seem manageable, but what happens when you start to hire and expand? We've seen it before: your HR foundation may prove to not be as stable as you thought it was, and your approach may need some adjustments if you want to continue growing, succeeding, and integrating new team members.

From just starting out to taking a second look at your current HR processes, our checklist gives you a good overview of how to approach HR and also allows you to zoom in on specific topics like workforce planning and employee development. At CoAdvantage, we've seen it all. With 25+ years of experience and tens of thousands of businesses who have benefitted from our expertise, we're well-versed in the HR strategies and techniques required to help your organization thrive.

## Start with Strategy & Compliance

- ☐ Ensure HR strategy and foundation are aligned with business goals
- ☐ Clearly define and document HR policies and procedures
- ☐ Confirm legal compliance with local and federal labor laws and regulations such as
  - ☐ Fair Labor Standards Act (FLSA)
  - ☐ National Labor Relations Act (NLRA)

## Tackle Workforce Planning & Talent Acquisition

- ☐ Develop job descriptions that outline key responsibilities, experience levels, and performance expectations for each role
- ☐ Create a strong recruitment strategy that matches your culture and your long-term goals
- ☐ Structure your onboarding process to help new hires integrate and become productive

## Master Anti-Discrimination & Equal Employment

- ☐ Establish and enforce anti-discrimination policies and training to ensure all employees are treated fairly. Anti-discrimination laws include:
  - ☐ Americans with Disabilities Act (ADA)
  - ☐ Age Discrimination in Employment Act (ADEA)
  - ☐ Civil Rights Act (Title VII)
  - ☐ Equal Pay Act (EPA)
  - ☐ Genetic Information Nondiscrimination Act (GINA)
- ☐ Review hiring and promotion processes to ensure equal opportunities
- ☐ Commit to a safe and supportive environment for reporting and investigating harassment, complaints, and unfair treatment



## The Heart of HR Readiness: Compensation & Benefits

- ☐ Implement a well-defined pay structure and pay equity practices
- ☐ Streamline payroll processing for accuracy and compliance
- ☐ Effectively manage benefits administration (e.g., health insurance, retirement plans)
- ☐ Clarify policies for paid time off (PTO), sick leave, voting leave, and parental leave
- ☐ Comply with local, state, and federal wage laws as well as meal and rest break regulations
- ☐ Track and approve time off requests via a transparent, structured system
- ☐ Classify exempt and nonexempt employees correctly
- ☐ Document employee actions and maintain legal compliance with employment laws and company policies to prevent wrongful termination claims
- ☐ Refine your exit interview process
- ☐ Ensure that final paychecks comply with state wage laws regarding timing, unused PTO payouts, and severance agreements

## Get Performance Management & Employee Development in Check

- ☐ Pair clear goals with regular performance reviews
- ☐ Provide ongoing training programs like workshops, mentorship, and online courses
- ☐ Make well-defined career paths and succession planning integral to business growth

## Watch for Your Workforce's Health & Safety

- ☐ Apply workplace safety policies and programs that comply with the Occupational Safety and Health Act (OSHA)
- ☐ Develop and maintain an employee wellness program (EAP)
- ☐ Take action now for future crisis management and emergency preparedness



## Which of these categories is the biggest need or challenge for you?

CoAdvantage addresses HR at every level, mitigating risk and preparing you for success in the years to come.

Keep reading for a closer look at the policies, procedures, and compliance considerations you'll need to polish up your approach to the human side of business.



# HR Readiness Checklist Deep Dive

## Strategy & Compliance

Much like a house requires a strong, stable foundation in order to stand the test of time, your HR strategy should be structurally sound and built with the future in mind. This means having clear, up to date policies in place that support your day-to-day operations as well as your long-term growth. Well-documented HR policies and procedures provide clarity for employees, reduce legal risks, and help standardize processes across the organization.

Compliance is critical, too. Your business must adhere to all relevant local, state, and federal labor laws if you want to avoid costly fines and legal disputes. Let's take a closer look at two regulations that are particularly important:

- **Fair Labor Standards Act (FLSA):** The FLSA establishes national standards for minimum wage, overtime pay, recordkeeping, and child labor laws, ensuring fair compensation for workers. It requires employers to pay eligible employees time-and-a-half for hours worked beyond 40 in a workweek and set guidelines for exempt and non-exempt employee classifications (more on exempt and nonexempt employees later).
- **National Labor Relations Act (NLRA):** The NLRA protects employees' rights to organize, form unions, and engage in collective bargaining with their employers. It also prohibits employers from engaging in unfair labor practices, such as retaliating against employees for unionizing or participating in other collective actions.

Staying on top of evolving labor laws keeps your business operating ethically and efficiently while fostering a fair and supportive workplace.

## Workforce Planning & Talent Acquisition (Hiring)

The right people for your business are out there. Is your hiring process designed to find them? Clear, detailed job descriptions will help attract the right applicants for your open positions, saving you time and resources in the search for top talent.

However, even the most detailed job description won't have much benefit if you don't refine your recruitment strategy. Press pause and think about your company culture. The way you approach and find new employees should match those values precisely, helping you create an environment where career development, performance management, and long-term growth take priority.





You also have your onboarding experience to consider. Put yourself in your new hires' shoes. What will help them integrate smoothly and become productive, engaged members of your organization? What will help them feel supported and seen? As you take on employees, ensure that you're communicating your values, your mission, and your expectations clearly so that everyone is welcome and well-prepared to take on their roles.

## Anti-Discrimination & Equal Employment

Creating a fair and inclusive workplace begins with establishing and enforcing anti-discrimination policies. These policies should cover all forms of discrimination, including age, disability, race, gender, and other protected categories. Training programs can educate all employees about these policies and teach them to recognize and respond appropriately to any discriminatory behavior. Here's some key legislation:

- **Americans with Disabilities Act (ADA):** The ADA prohibits discrimination against individuals with disabilities in all areas of public life, including employment. It requires employers to provide reasonable accommodations to qualified employees with disabilities.
- **Age Discrimination in Employment Act (ADEA):** The ADEA protects employees and job applicants aged 40 and older from discrimination based on age in hiring, promotion, discharge, and other employment practices. In other words, age cannot be used as a barrier to employment opportunities.
- **Civil Rights Act (Title VII):** Title VII prohibits employment discrimination on the basis of race, color, religion, sex, and national origin. It applies to all aspects of employment, including hiring, firing, promotions, and harassment.

### Your work doesn't stop at anti-discrimination policies.

It's equally important to review and reassess your hiring and promotion practices regularly. Why? All candidates and employees should be evaluated based on their skills, qualifications, and experience, not on any protected characteristics. Equal opportunities can be woven into every step of the process, from recruitment and hiring to internal promotions and career advancement, eliminating bias and encouraging true success.



# Compensation & Benefits

## Pay Structure & Transparency

Fair pay goes a long way in supporting a productive workforce. Your business's pay structure and pay equity practices should be well-defined and transparent, perhaps following one of these common pay structures:



**Market-based Pay Structures:** A market-based pay structure sets employee salaries based on industry standards, regional wage data, and competitor pay practices to help your company remain competitive in attracting and retaining talent.



**Commission-based Pay Structures:** A commission-based pay structure compensates employees primarily through commissions, where earnings are tied to the amount of sales or business they generate. This structure incentivizes performance by directly linking compensation to individual or team achievements, motivating employees to increase productivity and revenue.

Fair pay also equates to pay transparency: the practice of openly sharing information about compensation, including salary ranges, pay structures, and sometimes even individual salaries, with employees and job candidates, aiming to promote equity and accountability in the workplace. In fact, some states have pay transparency laws that mandate employers to disclose information about employee compensation, either to employees themselves or to the public.

## Benefits Administration, Payroll, and Leave Policies

These three areas are your key to smooth, sustainable, and compliant HR operations. You need to scope out the best health insurance, retirement plans, wellness programs, and other company perks for a happy, healthy workforce you can retain. Remember, the **Affordable Care Act (ACA)** mandates that most employers with 50 or more full-time employees provide health insurance or face penalties. Additionally, you must ensure that payroll processing is accurate and compliant with tax laws and wage regulations. You are required to withhold federal income tax and Social Security and Medicare taxes and contribute to federal and state unemployment programs.

Your time off policies must be clearly defined and comply with local, state, and federal laws:

- **Paid Time Off (PTO):** Employers typically offer PTO to provide employees with paid leave for vacation, personal time, or illness. While not mandated by federal law, PTO policies must be clear and consistently applied to ensure equitable access for all your employees.
- **Sick Leave:** Federal law does not mandate paid sick leave, but certain states and localities do. Additionally, certain states require sick leave balances to be shown on paystubs.
- **Voting Leave:** Some states require employers to provide paid or unpaid leave for employees to vote during elections. Federal law does not mandate voting leave, but you must follow your state's regulations regarding voting leave requirements.



- **Parental Leave/Family and Medical Leave (FMLA):** Under the Family and Medical Leave Act (FMLA), eligible employees can take up to 12 weeks of unpaid, job-protected leave for the birth or adoption of a child or to care for a family member with a serious health condition. Some states also provide additional paid family leave benefits, with policies that vary from state to state. This leave is protected, meaning employees can return to their position or an equivalent role after the leave period.
- **Military Leave:** Under the Uniformed Services Employment and Reemployment Rights Act (USERRA), employees who leave their jobs to serve in the military are entitled to return to their job after completing their service.
- **Bereavement Leave:** While federal law does not require you to provide bereavement leave, many employers offer it as a benefit. For consistency and fairness, define the scope of this leave (e.g., the number of days allowed and who is covered).
- **Jury Duty Leave:** Federal law requires you to allow employees to take jury duty leave without fear of job loss or retaliation. While you are not required to pay employees during jury duty leave, you may choose to do so as part of their employee benefits package.
- **Workers' Compensation Leave:** Employees who are injured on the job may be eligible for workers' compensation benefits, which vary by state. You must comply with state-specific workers' compensation laws, which typically cover medical expenses and lost wages due to work-related injuries or illnesses.
- **Leave for Domestic Violence Victims:** Some states have laws that provide leave for employees who are victims of domestic violence or sexual assault to attend court proceedings, seek medical treatment, or find legal assistance. Employers must stay informed about state-specific leave laws related to this issue.



**One more tip:** Create a transparent system for tracking and approving time off so that employees understand how to request leave and your managers can plan accordingly.

## Terminations

No one wants wrongful termination claims. Thankfully, clear records and adherence to company policies help protect your business. You can also rethink your exit interview process to gather valuable feedback from departing employees and ensure that final paychecks comply with legal standards, such as unused PTO payouts and severance agreements.



## Employee Classification

Employees need to be properly categorized as exempt or non-exempt under the Fair Labor Standards Act (FLSA). Exempt employees, typically in salaried roles above a certain pay threshold, are not entitled to overtime pay, while non-exempt employees, usually paid hourly, must receive overtime compensation for hours worked beyond 40 hours per week. Misclassifying employees can lead to serious legal and financial consequences, including back pay, penalties, and legal claims for unpaid wages. It's on you to carefully evaluate job duties, compensation levels, and other factors to determine whether an employee qualifies for exemption.

## Performance Management & Employee Development

Do your employees have opportunities to grow? Creating clear career paths and succession planning is essential as it shows employees how they can grow within the company while ensuring that your business is always prepared to promote from within, reducing turnover and maintaining continuity in leadership. The execution is simple. Invest in training and professional development programs that allow employees to build skills and stay engaged. These can include workshops, online courses, and mentorship programs.

Support your efforts in professional development with goal-setting procedures and structured performance reviews. Specific, measurable goals are a roadmap for success. Meanwhile, performance reviews offer ongoing feedback and the opportunity to recognize achievements and address areas for improvement.

## Health & Safety

This checklist item may come last, but it's far from being the least important. Your business should have workplace safety policies that comply with the Occupational Safety and Health Act (OSHA), covering everything from hazard communication to equipment safety and emergency procedures. Regular safety training and risk assessments help ensure that employees understand safety protocols and are equipped to handle potential hazards.

Additionally, a strong employee wellness program (EAP) can support the physical and mental well-being of your team. Providing access to wellness resources, counseling, and stress management programs can boost employee morale and reduce absenteeism.

Finally, businesses must plan for crisis management and emergency preparedness so that employees know what to do in the event of an emergency. This involves creating detailed plans for natural disasters, workplace accidents, and other emergencies, along with regular drills to ensure everyone is prepared. Having a clear communication strategy in place is critical for responding quickly and minimizing disruption.





## HR Is Essential—And We're Here to Help

Managing HR goes deeper than legal compliance. It's really about building a thriving, productive workplace. Our checklist covers many of the most critical HR priorities, but tackling them effectively takes time, expertise, and the right support. That's where CoAdvantage comes in.

As a leading PEO, we help businesses like yours to not only stay compliant, but also streamline HR and create a strong foundation for success. Whether you need help with payroll, benefits, compliance, or strategic HR planning, our experts are ready to support you.

Let's take your HR to the next level. Contact us today to learn more about how CoAdvantage can help you get your HR strategy in order.

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## People + Tech = HR That Clicks



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