

HR Covered™ Small Business HR Survival Checklist

A practical guide to protecting your business through better people practices.

This checklist is designed as an essential self-assessment tool for small business owners and leadership teams. Use it to audit your current HR operational practices, identify compliance gaps, and implement structured systems across recruitment, onboarding, recordkeeping, and performance management.



1 SECTION ONE

Stay Compliant (Wage, Hour & Recordkeeping)

Ensure your business meets state and federal labor standards by establishing organized and compliant recordkeeping practices.

Status	Checklist Item	Best Practice Guidance & Scope
☐	 Employee files are complete	Maintain separate confidential medical/ I-9 files apart from general personnel files (offer letters, tax forms, emergency contact).
☐	 Job descriptions are current	Review annually to reflect actual duties, required skills, physical demands, and measurable outcomes.
☐	 Time records are accurate	Track exact clock-in/out times for hourly employees, including meal breaks and overtime approvals.
☐	 Payroll records are maintained	Retain payroll registers, wage rates, deductions, and tax documentation for required legal retention periods (typically 3-7 years).
☐	 Required workplace posters displayed	Post updated federal, state, and local labor law notices in a conspicuous area accessible to all workers (or digitally for remote teams).
☐	 Employee classifications reviewed	Audit Exempt vs. Non-Exempt status and W-2 vs. 1099 Independent Contractor designations according to current labor guidelines.



2 SECTION TWO

Hire Smarter (Simplified Recruitment)

Shift from reactive hiring out of panic to a structured selection process that identifies qualified, long-term team members.

Status	Checklist Item	Best Practice Guidance & Scope
☐	 Written job description	Clear outline of primary responsibilities, essential skills, and success metrics prior to posting the position.
☐	 Standard interview questions	Develop a set of job-relevant, behavioral questions asked consistently of every applicant to ensure objective evaluation.
☐	 Consistent hiring process	Define standardized steps from screening, skills assessment, to final interview stages for equitable decision-making.
☐	 Reference checks completed	Verify past performance, reliability, and work history with former supervisors before issuing a formal offer.
☐	 Written offer letter	Provide a clear letter detailing start date, pay rate, employment status (at-will), schedule, and key contingencies.



3 SECTION THREE

Welcome Employees Well (Day One Onboarding)

Set a positive professional tone on day one to build employee confidence, engagement, and early retention.

Status	Checklist Item	Best Practice Guidance & Scope
☐	 Workspace ready	Clean workstation, supply setup, and physical access tools (keys, badges) prepared before the employee arrives.
☐	 Equipment assigned	Computer, phone, credentials, and software access configured, tested, and ready for immediate login.
☐	 Orientation completed	Welcome tour, team introduction, administrative paperwork processing, and company values orientation.
☐	 Policies reviewed	Review safety guidelines, employee handbook, attendance policies, and obtain signed acknowledgment receipt.
☐	 Expectations discussed	Clarify first-week goals, initial job training plan, and key points of contact for questions.
☐	 30-day check-in scheduled	Calendar formal feedback checkpoints at 30, 60, and 90 days to track progress and address questions early.



4 SECTION FOUR

Address Problems Early (Conflict & Documentation)

Address behavioral or performance issues promptly using factual, objective observation rather than emotional reaction.

Status	Checklist Item	Best Practice Guidance & Scope
☐	 Coach promptly	Initiate direct, private conversations as soon as an issue occurs instead of waiting for annual reviews.
☐	 Document facts	Record specific dates, times, behaviors, and business impacts (e.g., "Report missed by 3 days" vs "Lazy").
☐	 Set expectations	Establish clear, actionable goals and metrics required for performance improvement.
☐	 Schedule follow-up	Set a specific follow-up date (e.g., 2 weeks) to review progress and maintain accountability.
☐	 Recognize improvement	Acknowledge positive behavior change promptly to reinforce expectations and boost workplace morale.

➔ NEXT STEPS: Let's Build a Stronger Business

Ask Yourself...

Can I confidently answer YES to every item on this checklist?

- ✓ Yes – Our systems are secure, compliant, and up-to-date.
- ✓ Almost – We have basic practices, but some compliance or recordkeeping gaps exist.
- ✓ I need help – We need an expert partner to help build the right HR infrastructure.



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COMPLIMENTARY
WORKFORCE STRATEGY
SESSION

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Let's discuss your business, your team, and your next steps to protect and scale your organization.

It starts with one conversation.

