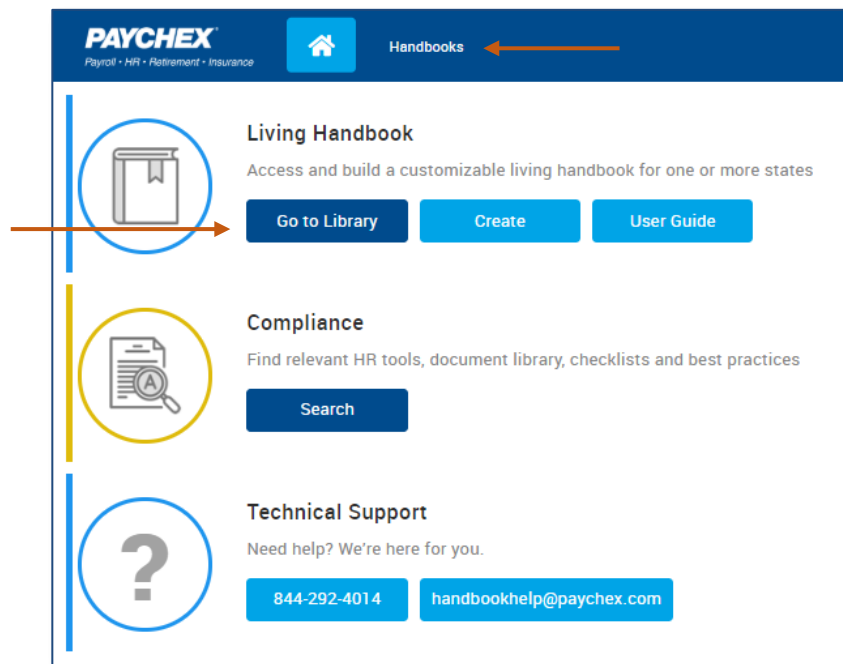


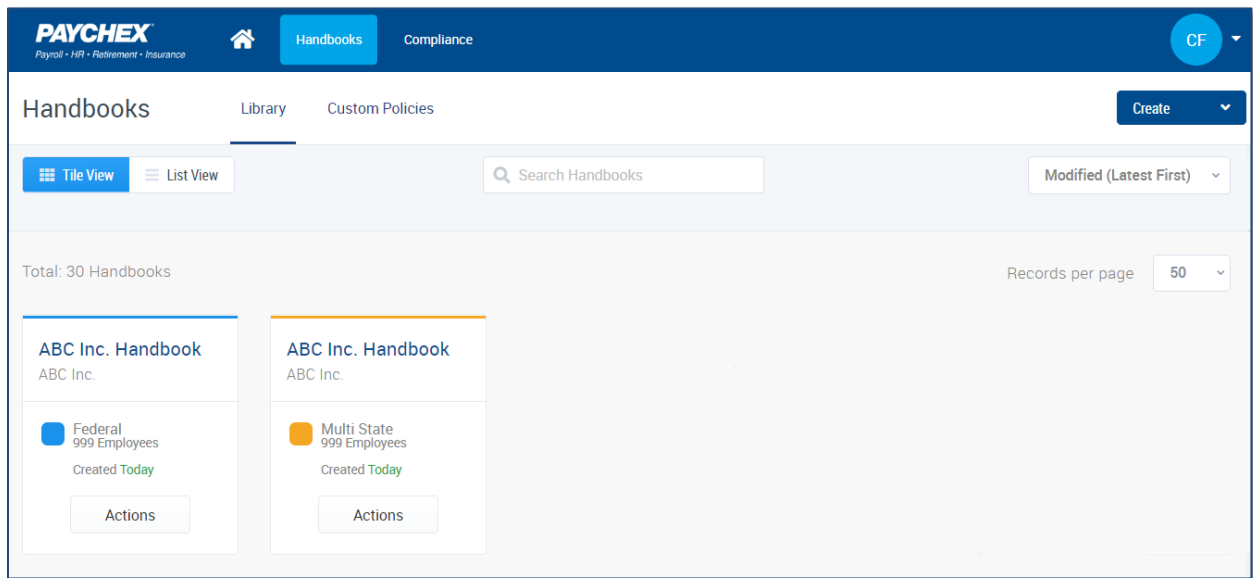
# Living Handbook User Guide

The Living Handbook allows you to quickly and easily create employee handbooks and keep them current when state and federal laws change. This step-by-step guide will direct you through the Living Handbook tool and provide insight into all of its features.



To access the Living Handbook, log in to ThinkHR, and click on **Handbooks** in the top menu bar. This will take you to your **Handbook Library** where you can create a new handbook or edit an existing handbook. You can also access the **Handbook Library** by clicking on the **Go to Library** button in the **Living Handbook** section of the Home Page.

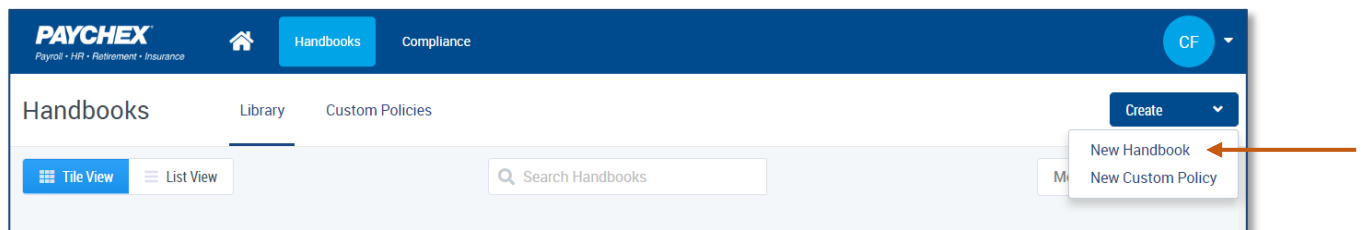
# Handbook Library



The **Handbook Library** stores all of the handbooks you have created for your company. By default, they are listed alphabetically in the **Tile View** format (to change to list format, choose the **List View** button in the upper left corner of the screen). Click the drop-down list in the top right corner to sort using other criteria, such as “date modified.” You can also search for a handbook by name using the search box at the top. Handbooks are also color-coded by type. **Federal Only** handbooks will have icons with blue highlights, and **Multistate (Federal + States)** handbooks will have icons with orange highlights.

## Creating a Handbook

To start a new handbook, click **Create** in the top right corner of the **Handbooks Library** and choose **New Handbook**. This feature can also be accessed from the Home Page under the **Create** button in the **Living Handbook** section.



You will arrive at the **New Handbook** page where you will fill out the required fields for your new handbook.

## Fields:

- **Handbook Name:** Create a distinct name for each handbook. If users within your company share access, consider differentiating handbooks by users and using the date to identify (for example, “ABC Jane Doe Dec 2018”). The handbook name you enter will appear on the cover page of your downloaded handbook.
- **Handbook Type:** From the drop-down in this field, select **Federal Only** or **Federal + States**. **Note:** This field cannot be edited after initial save.
- **Company Name:** This company name will pre-populate in all policies based on the company that you’ve chosen. This field can be changed if needed.
- **Company Logo:** Upload the company logo that is to appear on the cover page of the handbook. The logo must be in either GIF, PNG, or JPEG format with a file size of less than 500 KB. The image will be scaled to fit and will be visible when you download the finished handbook.
- **How do you refer to your company?** This field is used throughout the tool where {{COMPANY-TERM}} appears within policy language. It will default to “Company,” but you can select alternative options such as Agency, Bank, Club, and others with the drop-down menu here.
- **How do you refer to your employees?** This field is used throughout the tool where {{EMPLOYEE-TERM}} appears within policy language. It will default to “Employees,” but you can select alternative options such as Associates, Staff Members, Team Members and others with the drop-down menu here.
- **Head of Company:** This field refers to your top executive (CEO, President, Owner, and so on) and is in the Welcome and Closing Statement policies
- **Head of Company Title:** Add the title of the head of company.
- **Primary Contact:** This field refers to the main point of contact for your employees and is used throughout the tool. We recommend you use the name your company uses to refer to the HR department, such as “Human Resources” or “People Operations.”
- **How do you refer to your managers/supervisors?** This field is used throughout the tool where {{MANAGER-SUPERVISOR}} appears within policy language.

The screenshot shows the 'New Handbook' settings page in the Paychex system. The page is divided into two main sections: 'Handbook Information' and 'Company Information'. The 'Handbook Information' section includes fields for 'Handbook Name' (set to 'ABC Inc. Handbook') and 'Handbook Type' (set to 'Federal + States'). The 'Company Information' section includes fields for 'Company Name' (set to 'ABC Inc.'), 'Company Logo' (with an upload button), 'How do you refer to your Company?' (set to 'Company'), 'How do you refer to your Employees?' (set to 'Employees'), 'Head of Company' (set to 'John Smith'), 'Head of Company Title' (set to 'President'), 'Primary Contact' (set to 'Human Resources'), and 'How do you refer to your managers/supervisors?' (set to 'Managers'). Each field has a description of its purpose and how it is used in the handbook.

- **Choose States:** If **Federal + States** is selected, choose the applicable state and click **Add State**. You will then see your chosen state in the section below and the number of employees for that state will automatically populate with “0.” Change the number in the state field to reflect the accurate number of employees you have in the state. Laws in many states vary based on employee count. Thus, the accuracy and compliance of your handbook depends on making sure you correctly enter employee count for each state. You can edit this field as your company grows or state employee counts change.
- **Total Employee Count:** If **Federal Only** is selected, enter the total number of employees to accurately determine which policies will be included in the handbook.

Employee / State Information

**Choose States** REQUIRED

Choose a State Add State

The Federal Handbook requires the total number of employees be entered to add to required compliance policies

CALIFORNIA	995	✕
COLORADO	4	✕
<b>TOTAL EMPLOYEES</b>	<b>999</b>	

As you create and update handbooks, and enter state employee counts, you'll be notified if a discrepancy in employee count is encountered between system administration and a state.

If the employee count does not match the data in system administration, the system performs two actions:

- The state with the discrepancy is shown in red.
- A message is displayed notifying you of the actual number of employees in the state. Note that the actual number of employees is based on the company information in system administration.

When you have an employee count discrepancy, we recommend that you correct the headcount for the state. Resolving employee count discrepancies ensures you have the most relevant experience based on your company profile.

If you choose to proceed without reconciling the employee count, any future insights or recommendations the system provides to you will be based on the company information stored in system administration and not the employee count for the state.

Once the required fields are entered, you'll have the option to save and review the **Table of Contents** and individual policies by clicking **Save & Review Policies** or save the handbook and return to the **Handbook Library** by clicking **Save Handbook & Exit**.

**Save & Review Policies**

A new handbook will be created with applicable policies and you will be able to review the table of contents.

**Save Handbook & Exit**

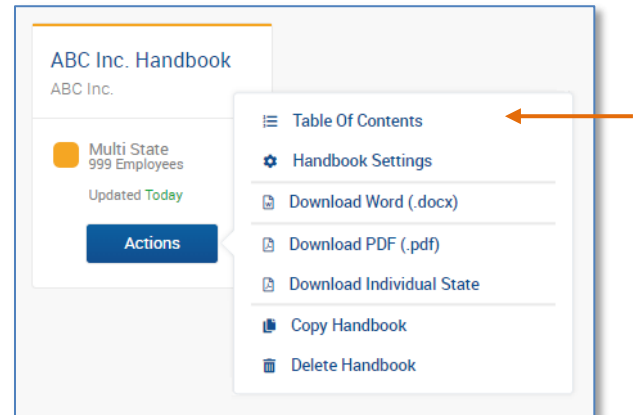
A new handbook will be created with all applicable policies. You will be able to edit this handbook later at any time.

## Table of Contents

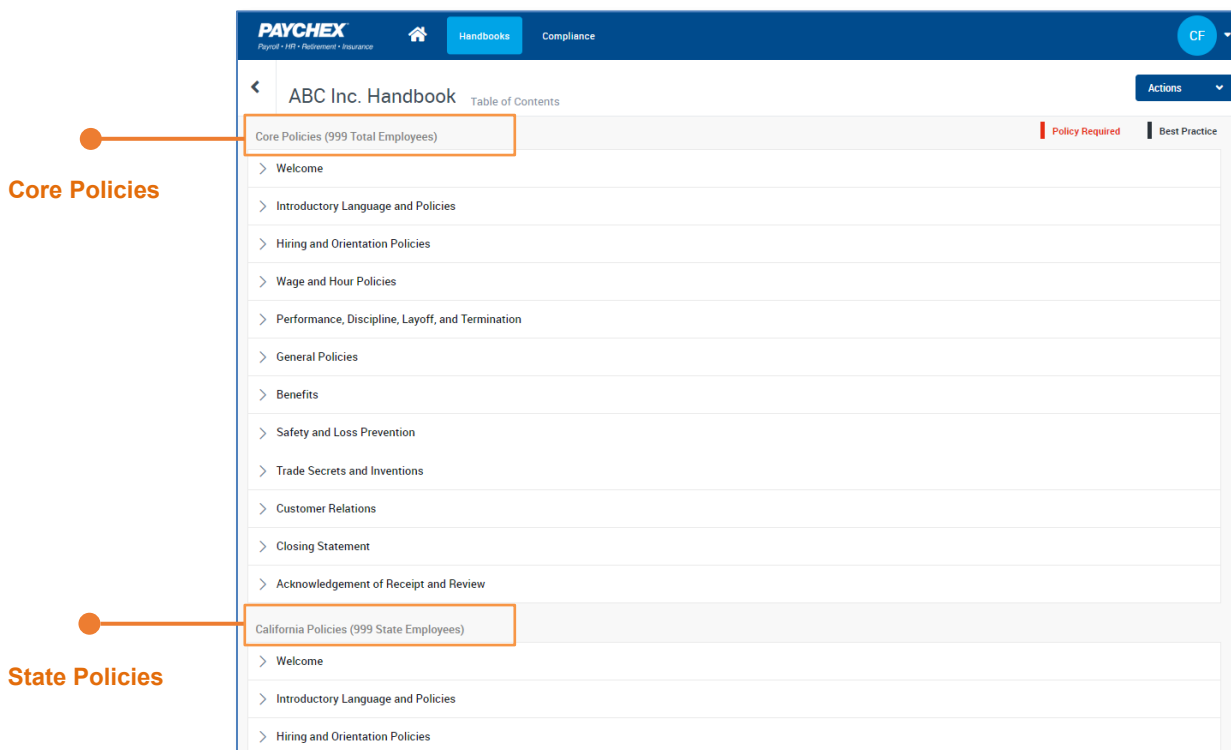
Once you've customized these basic fields for your handbook, you can start to review all of the policies and make further customizations. To review individual policies, go to the **Table of Contents** for your chosen handbook.

You can access the **Table of Contents** from two locations:

1. **Handbook Settings:** Click the **Save & Review Policies** button.
2. **Handbook Library:** Click the **Actions** button at the bottom of the handbook icon and select **Table of Contents**.



For either a **Federal** or **Multistate** handbook, you'll see a **Core Policies** section at the top. If you've created a **Multistate** handbook, after the **Core Policies** you'll see a separate section for policies that are specific to the states you've selected.



Now choose the policies to be included in each handbook. Clicking on the policy section title will expand the list to show all of the individual policies.

The Living Handbook indicates which policies are required, and which policies are best practices or optional.

**“Required”** policies include those where specific federal or state laws govern the workplace, and it is important to ensure that all employees are aware of those compliance requirements. Policies such as nondiscrimination and wage and hour requirements are examples. You will see a red highlight next to required policies when the **Table of Contents** is expanded.

**“Best practice”** policies include common workplace practices that may not be governed by a specific federal or state law but provide employees with more information about the company and its expectations. Best practice policies include company codes of conduct and use of company resources. These policies will have a black highlight next to them.

The screenshot displays the Paychex 'ABC Inc. Handbook' interface. The top navigation bar includes the Paychex logo, a home icon, and tabs for 'Handbooks' and 'Compliance'. A user profile icon 'CF' is in the top right. Below the navigation bar, the page title is 'ABC Inc. Handbook' with a 'Table of Contents' link. A 'Policy Required' (red bar) and 'Best Practice' (black bar) filter is visible. The main content area lists policy categories: 'Welcome', 'Introductory Language and Policies', 'Hiring and Orientation Policies', and 'Wage and Hour Policies' (expanded). Under 'Wage and Hour Policies', a list of individual policies is shown with 'Edit' and 'Details' links and status toggles. Policies like 'ATTENDANCE POLICY' and 'BUSINESS EXPENSES POLICY' are marked as 'Required' (red bar). 'POSTING OF WORK SCHEDULES' is marked as 'Optional' (no bar). 'RECORDING TIME' and 'TRAVEL EXPENSES' are marked as 'Best Practice' (black bar). Annotations with orange lines point to these status indicators: 'Required Policy' points to the red bar, 'Best Practice Policy' points to the black bar, and 'Optional Policy' points to the 'POSTING OF WORK SCHEDULES' row.

Policy Name	Status
ATTENDANCE POLICY	Required
BUSINESS EXPENSES POLICY	Required
DIRECT DEPOSIT	Optional
INTRODUCTION TO WAGE AND HOUR POLICIES	Optional
JOB ABANDONMENT	Optional
PAYCHECK DEDUCTIONS	Optional
POSTING OF WORK SCHEDULES	Optional
RECORDING TIME	Best Practice
TRAVEL EXPENSES	Best Practice
USE OF EMPLOYER CREDIT CARDS	Optional

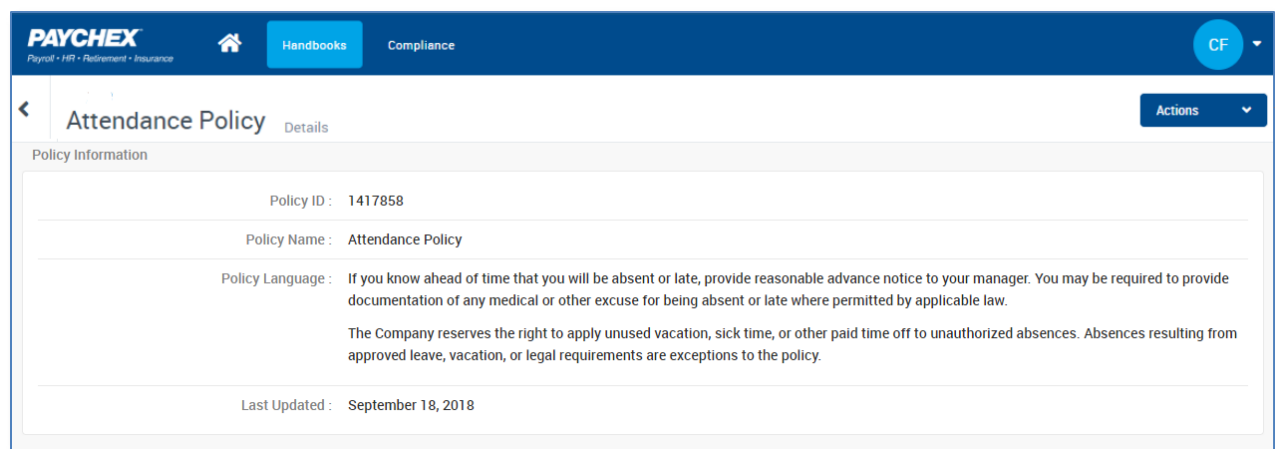
Policies without a highlight are **“optional.”** These policies include company-specific information regarding culture and activities.



Policies can be enabled or disabled at any time by clicking on the toggle switch to the right of each policy. By default, “**Required**” and “**best practice**” policies will be enabled, and “**optional**” policies will be disabled when they are added to a handbook. An enabled policy is indicated by a green toggle switch and a disabled policy is indicated by a gray switch. If a policy is disabled, it will still be shown in the **Table of Contents** of the tool itself, but it will not be included in your final downloaded document.

By clicking on the individual policies, you will see that you have options to view the policy details or make edits.

Click on **Details** to see basic information about the policy, such as policy name, policy language, and last updated date. From the **Details** page, click on **Actions** to go directly to the **Policy Editor**, which allows you to make edits to the policy language. (Note that revisions to policies may bring them out of compliance with state or federal law. Review all changes with legal counsel.)



You can also access the **Policy Editor** by expanding the policy section within the **Table of Contents** and clicking **Edit** next to the individual policy.

The **Policy Editor** includes the following information:

- **Policy Instructions:** This includes sample language for a policy, guidance on inserting your own custom policy, and updates about new policies and when they become effective.
- **Policy Description:** Provides insight into the importance and relevance of the policy.
- **Policy Language:** In the content area, you’ll see the standard language for the policy, including the fields that will automatically populate with the information you provided on the **Handbook Settings** page when you created your handbook. You can customize the language to match your company culture and tone.
- **Preview Policy:** Click this button to preview how the policy will look in the downloaded version of the handbook. Fields in all caps and double brackets like {{MANAGER-SUPERVISOR}} and {{COMPANY-NAME}} will populate from the information that you entered on the **Handbook Settings** page.
- **View Default Policy:** This displays the most up-to-date version of that policy. You can revert to the default policy at any time (this will delete any customizations you’ve made).

Save edits by clicking the **Save Policy** button.

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Handbooks Compliance

CF

## Attendance Policy Settings

**Policy Instructions**  
A new autofill field, {{MANAGER-SUPERVISOR}}, has been added to this policy. The new field lets you identify to whom employees should go for handbook policy questions (their manager, supervisor, or other). Go to "Handbook Settings" to make that specification.

**Policy Description**  
Outline policies for attendance, tardiness, and requests for time off, and administer them consistently to all employees.

**Policy Language**

⌵ B / S ☰ ☹ —

If you know ahead of time that you will be absent or late, provide reasonable advance notice to your {{MANAGER-SUPERVISOR}}. You may be required to provide documentation of any medical or other excuse for being absent or late where permitted by applicable law.

{{COMPANY-NAME}} reserves the right to apply unused vacation, sick time, or other paid time off to unauthorized absences. Absences resulting from approved leave, vacation, or legal requirements are exceptions to the policy.

**POLICY ENABLED**

**Save Policy**

**Preview Policy**

**View Default Policy**

**Caution!**  
If you have changed the language in this policy, note that this may bring the policy out of compliance with federal or state law. By making changes to this policy or replacing it with your own policy, you assume the risk that the policy may no longer be in compliance with the law. We recommend having any changes in this policy reviewed by legal counsel prior to implementing the handbook.

If you edit a policy in the editor and attempt to leave the page by clicking the back arrow, you will be prompted to either save your work or continue without saving.

**Caution! Unsaved changes**

! Your changes have not been saved. Do you want to stay on the page so that you can save your changes?

**CANCEL** **CONTINUE WITHOUT SAVING**



Within certain policies, there may be additional fields or edits for you to make. Those fields will be highlighted in orange and bracketed. **Policy Instructions** will describe the actions you need to take for that specific policy.

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## Jury Duty Leave Settings

**Policy Instructions**  
A new autofill field, {{MANAGER-SUPERVISOR}}, has been added to this policy. The new field lets you identify to whom employees should go for handbook policy questions (their manager, supervisor, or other). Go to "Handbook Settings" to make that specification.

**Policy Description**  
Most states have laws that prohibit discrimination against an employee who has been called to jury duty. Employers should have a policy, consistent with state law, which explains any benefits that will be provided by the employer (unpaid leave, paid leave, etc.) with regard to jury or witness leave and any procedures for requesting such leave.

**Policy Language**

[[COMPANY-NAME]] encourages [[EMPLOYEE-TERM]] to fulfill their civic duties related to jury duty. If you are summoned for jury duty, notify your [[MANAGER-SUPERVISOR]] as soon as possible to make scheduling arrangements.

If you are classified as exempt, you will not incur any deduction in pay for a partial week's absence due to jury duty. If you are classified as nonexempt, you will not be compensated for time spent on jury duty. You may opt to use [[PTO/vacation]] in place of unpaid leave.

The [[COMPANY-TERM]] reserves the right to require [[EMPLOYEE-TERM]] to provide proof of jury duty service to the extent authorized by law.

The [[COMPANY-TERM]] will not retaliate against [[EMPLOYEE-TERM]] who request or take leave in accordance with this policy.

**Special Note**  
Under [California law](#), employers are required to provide nonexempt employees with unpaid leave to serve on an inquest jury or trial jury if the employee, prior to taking leave, gives reasonable notice of his or her need to serve. Employees may choose to use PTO/vacation time for such leave.

Some policies will include a **Special Note** section with further information about that policy. This may include links to material in the Comply library for more detailed information. Note that **Policy Instructions**, **Policy Description**, and **Special Notes** are visible during handbook creation only and will not be downloaded for inclusion in the finalized handbook.

## Reordering Table of Contents

To reorder individual policies within the Table of Contents, click on the **Reorder** button at the top left corner of the screen. You will see the screen change to reordering mode. Select the policy you want to reorder, then drag and drop to your desired section. Repeat the process with all other policies you wish to reorder. Click **Save** to save your changes or **Cancel** to exit reordering mode.

**Note:** You cannot move a state policy to another state (for example, you cannot move a California policy to the Washington section of a multistate handbook).

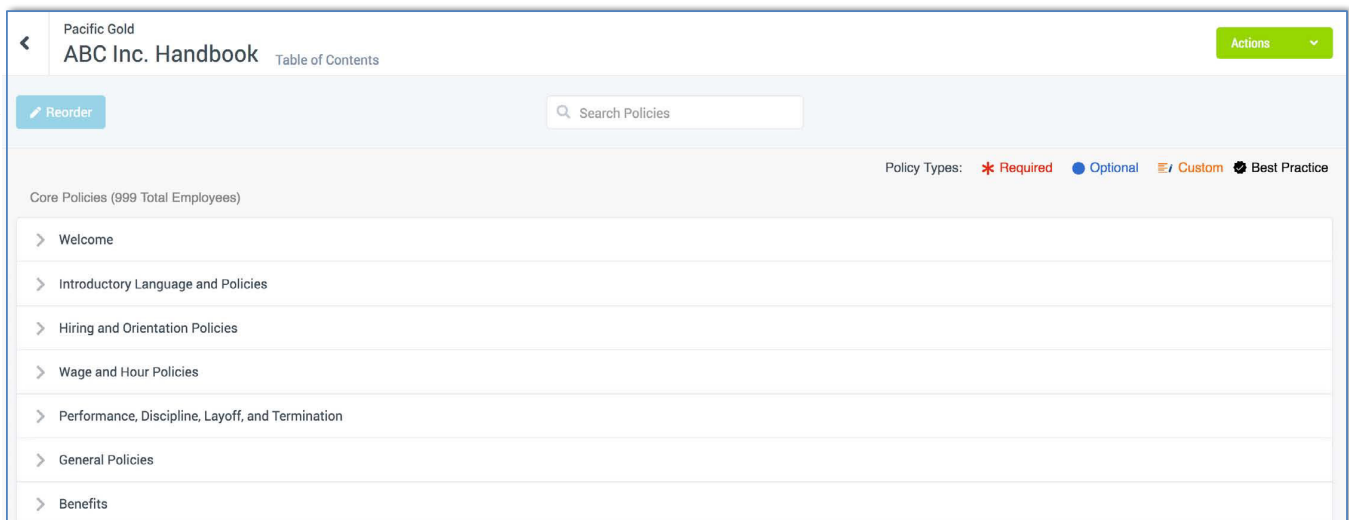
A state policy can be moved to the core section, and moved back only to its original state. (For example, you can move a California policy to the core section and move it back to California, but you cannot move the California policy to Texas). When a state policy is moved to the core section it will continue to behave as a state policy with appropriate language on the policy page.

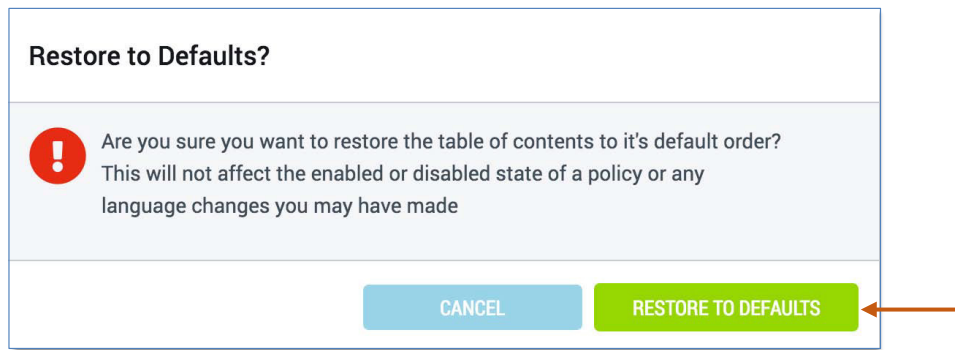
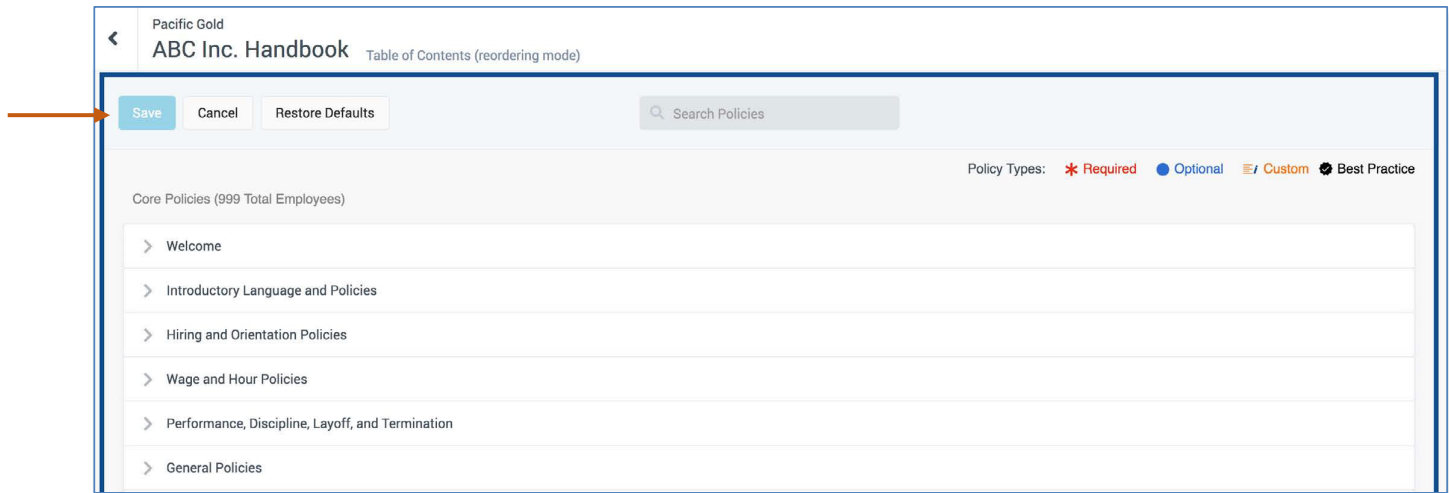
To reorder an entire section of policies within the Table of Contents, click on the **Reorder** button at the top left corner of the screen. You will see the screen change to reordering mode. Select the section you want to reorder, then drag and drop to your desired section. Repeat the process with all other sections you wish to reorder. Click **Save** to save your changes or **Cancel** to exit reordering mode.

**Note:** You cannot move a state section to the core section or vice versa.

**Note:** You cannot move a state section to another state (for example, you cannot move a Michigan section to the Ohio section of a multistate handbook).

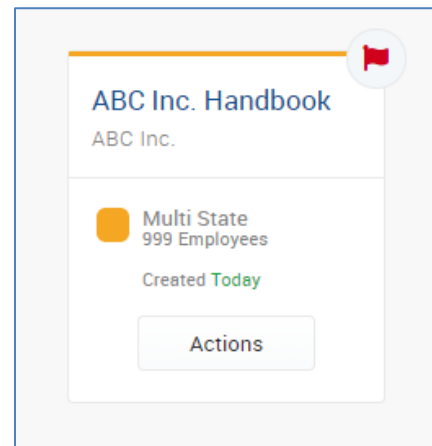
To restore the Table of Contents to the default order, click on the **Reorder** button and choose the **Restore Defaults** button. You will get a confirmation message. Once you confirm, the Table of Contents will default to the original settings.



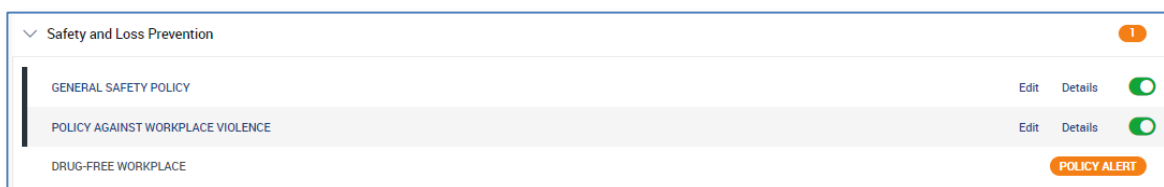


## Updates to Policies

When a policy has been updated due to a legislative or regulatory change, a red flag will be displayed next to all handbooks in the **Handbook Library** containing that policy. To review the policy change, click on the flag to go to the **Table of Contents** for your handbook



The **Table of Contents** will show a **Policy Alert** button for policies that have changed.



When there is a policy update, the policy will be locked, and edits cannot be made until you choose to accept or dismiss the updates. To review the policy change, click on the **Policy Alert** button, read the alert, and click either **Accept Policy Changes** or **Dismiss Alert**. You will not be able to download the handbook until you've responded to all alerts. Note that clicking on **Accept Policy Changes** will override any past custom content changes made to the policy, including the additional fields for your customization (the details you added in the orange brackets).

If a policy update is due to the creation of a new policy or if a policy type has been changed to **"Required,"** accepting the policy alert will enable the policy. Dismissing the alert will leave the policy and the toggle switch unchanged.

## Subscribe to Email Alerts for any of Your Handbooks

You can subscribe to email alerts when policy language changes and updates to a handbook are recommended. Every individual that has access to a handbook can subscribe to email alerts for that handbook. All updates for the handbook are consolidated into a single email and sent to every subscriber.

**Note:** This feature replaces the option to subscribe to notifications under *My Account*. Any notifications you had previously set up under *My Accounts* have been automatically transferred to the *Settings* page, and no further action is required on your part to continue receiving alerts.

To turn email alerts on or off for a handbook:

1. Go to the **Handbooks** page and **select** the **handbook** of interest.
2. Click the **Settings** icon to open the Settings page.
3. Select the **Subscribe to Alerts** check box option:
  - A checked box enables email alerts for the selected handbook
  - An unchecked box disables all email alerts for the selected handbook
4. Repeat steps 1-3 for all other handbooks that you want to enable or disable email alerts for.

## Making Edits to a Saved Handbook

To make edits to the policies in a saved handbook, go to the **Handbook Settings** page. Find the handbook you wish to edit in the **Handbook Library**. From there, either click on the main icon of the handbook or click the **Actions** button and select **Handbook Settings**.

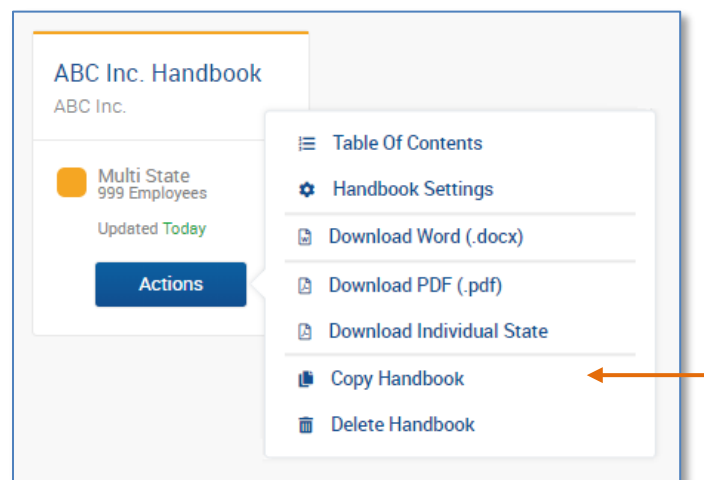
In **Handbook Settings**, you can change the following:

- Handbook Name
- Company Name
- Company Logo
- How do you refer to your company?
- How do you refer to your employees?
- Head of Company
- Head of Company Title
- Primary Contact
- How do you refer to your managers/supervisors?
- Total Employees

If you've created a **Federal Only** handbook and would like to add states, you will need to create a new handbook and select **Federal + States** to create a **Multistate** handbook. If you've created a **Multistate** handbook and you would like to revert to federal-only content, you will need to create a new handbook and select the **Federal Only** option.

## Copying a Handbook

To duplicate a handbook, locate the handbook in the **Handbook Library**, then click the **Actions** button and select **Copy Handbook**.



## Summary of Changes

The Living Handbook tool will display specific policies in your handbook based on the state chosen and the employee count for the organization. When updating the employee count on the **Handbook Settings** page, you will be directed to a **Summary of Changes** page. This page will show a list of the new policies that will be added, policies that will be removed, and policies that will be updated in your handbook based on your new employee count.

You will be able to choose to accept all updates made to your handbook according to the employee count change by clicking **Accept All Changes** or retain the previous settings by clicking **Dismiss All Changes**. Accepting all updates will overwrite any custom edits that you previously made to the individual policies. We suggest that you review your previous version of the handbook, specifically for those policies that will be updated, to review any custom edits that you've made. Compare your previous policies to the new updated policies and add your custom edits as applicable.

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Handbooks Compliance

ABC Inc. Handbook Summary of Changes

● Policy Will Be Added ● Policy Will Be Removed

California Policies (33 State Employees)

Benefits

FAMILY AND MEDICAL LEAVE OF ABSENCE POLICY	PREVIEW	REMOVED
PREGNANCY DISABILITY LEAVE (5-49 EE)	PREVIEW	ADDED
PREGNANCY DISABILITY LEAVE (50 OR MORE EE)	PREVIEW	REMOVED

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**Accept All Changes**  
By clicking "Accept," changes will be made to the identified policies as outlined in the summary of changes. Any custom language contained in the identified policies will be lost. There is no way to undo these changes once accepted.

**Dismiss All Changes**  
By clicking "Dismiss," no changes will be made to the identified policies and the change(s) made to your selected states and/or number of employees on the Handbook Settings page will be rolled back. Failure to accept the recommended changes may result in the identified policies being noncompliant with federal or state law. By failing to accept the changes, you assume the risk that the identified policies may no longer be legally compliant.

## Creating a Multistate Handbook

To create a new multistate handbook, click **Create** in the top right corner of the **Handbooks Library** and choose **New Handbook**. This feature can also be accessed from the Home Page under the Create button in the **Employee Handbook** section. If you've previously created a **Federal + One State** handbook, rather than start over with a new handbook, you can add additional states (we recommend you save a copy of the previous handbook).

On the **New Handbook** page, choose **Federal + States** from the Handbook Type drop-down menu. Find the **Choose States** section at the bottom of the **New Handbook** page. Choose each applicable state from the drop-down menu and click **Add State** after each addition.

The screenshot shows a form titled "Employee / State Information". Under the heading "Choose States", there is a dropdown menu labeled "Choose a State" and a red "REQUIRED" label. To the right of the dropdown is a blue "Add State" button, which is highlighted by an orange arrow. Below the dropdown, a note states: "The Federal Handbook requires the total number of employees be entered to add to required compliance policies". Below this note is a table with two rows for selected states:

CALIFORNIA	995	✕
COLORADO	4	✕

At the bottom of the table, the "TOTAL EMPLOYEES" is calculated as 999.

The number of employees for each new state will automatically populate with "0." Change the number in each state field to reflect the accurate number of employees for that state. The Total Employees field will autopopulate based on your state entries. These employee counts will determine which policies apply to your company and will be included in the handbook.

Laws in many states vary based on employee count. Thus, the accuracy and compliance of your handbook depends on making sure you correctly enter employee count for each state. You can edit this field as your company grows or state employee counts change.

After you save your multistate handbook, review the Table of Contents to make edits or additions to individual policies. (Note that revisions to policies may bring them out of compliance with state or federal law. Review all changes with legal counsel.) The Core Policies section includes policies applicable to all of the states in your handbook. After the Core Policies, you'll see a separate section for policies that are individually applicable to each state you've selected, as well as the number of employees in each state.



Pacific Gold		ABC Inc. Handbook		Table of Contents	Actions
Core Policies (999 Total Employees)					
>	Welcome				
>	Introductory Language and Policies				
>	Hiring and Orientation Policies				
>	Wage and Hour Policies				
>	Performance, Discipline, Layoff, and Termination				1
>	General Policies				
>	Benefits				1
>	Safety and Loss Prevention				1
>	Trade Secrets and Inventions				
>	Customer Relations				
>	Closing Statement				
>	Acknowledgment of Receipt and Review				
California Policies (500 State Employees)					
>	Introductory Language and Policies				
>	Hiring and Orientation Policies				

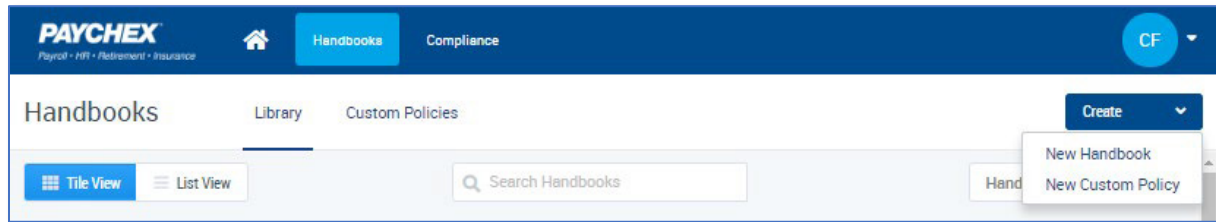
As with **Federal** and **Federal + One State** handbooks, you can download your handbook in either Word or PDF. We recommend you download your handbook in Word to review and make necessary adjustments or modifications before finalizing and distributing to your employees.

Consider making the following edits:

- Reorder other policies as needed.
- Search for the following items and update all necessary information as required:
  - Double square brackets (beginning brackets “[[“ and (ending brackets ”]”])
  - Any orange text
- Review for any grammar errors throughout and perform a spell check.

## Creating a Custom Policy

To create a **Custom Policy** for your handbook, click on the **Create** button in the upper right corner of the **Handbooks Library**. From the drop-down menu, choose **New Custom Policy**.

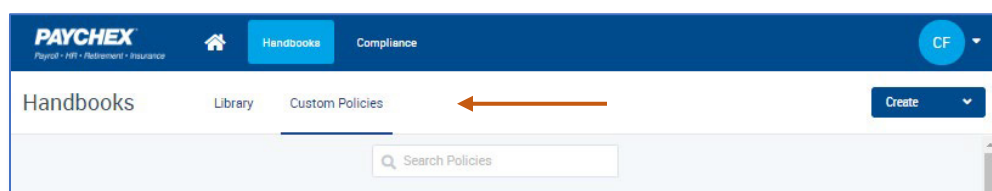


This will take you to the **New Custom Policy** settings where you will name the policy and enter the policy language.

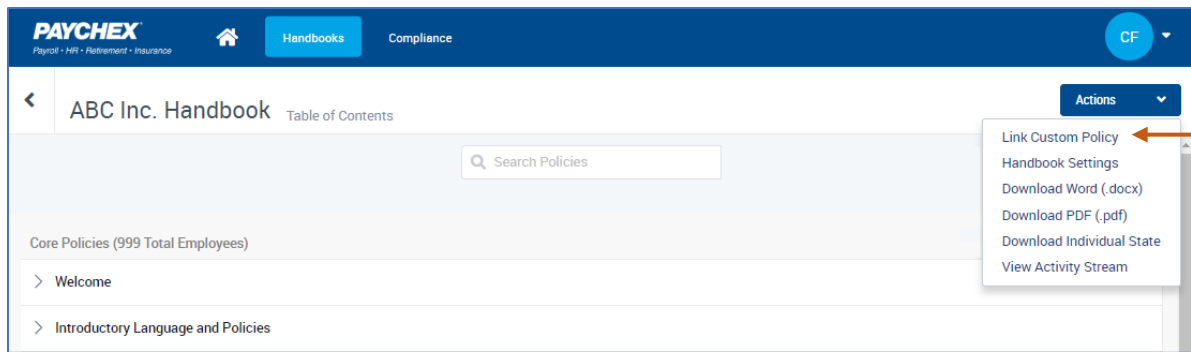
A screenshot of the 'New Custom Policy' settings page. The page has a left sidebar with a back arrow and the title 'New Custom Policy' with a 'Settings' link. The main content area is divided into two sections: 'Company Information' and 'Policy Language'. The 'Company Information' section has three fields: 'Policy Internal Name' (filled with 'Inclement Weather Policy'), 'Policy Display Name' (filled with 'Inclement Weather Policy'), and 'Auto-Include in New Handbooks' (radio buttons for 'Yes' and 'No', with 'Yes' selected). The 'Policy Language' section has a text box labeled 'Policy Language' which is empty. On the right side, there is a 'Save Policy' button and a disclaimer text. A red arrow points to the 'Auto-Include in New Handbooks' field.

You can choose to automatically include a custom policy in any new handbook that is created for this company by checking the “Yes” button in the **Auto-Include in New Handbooks** field.

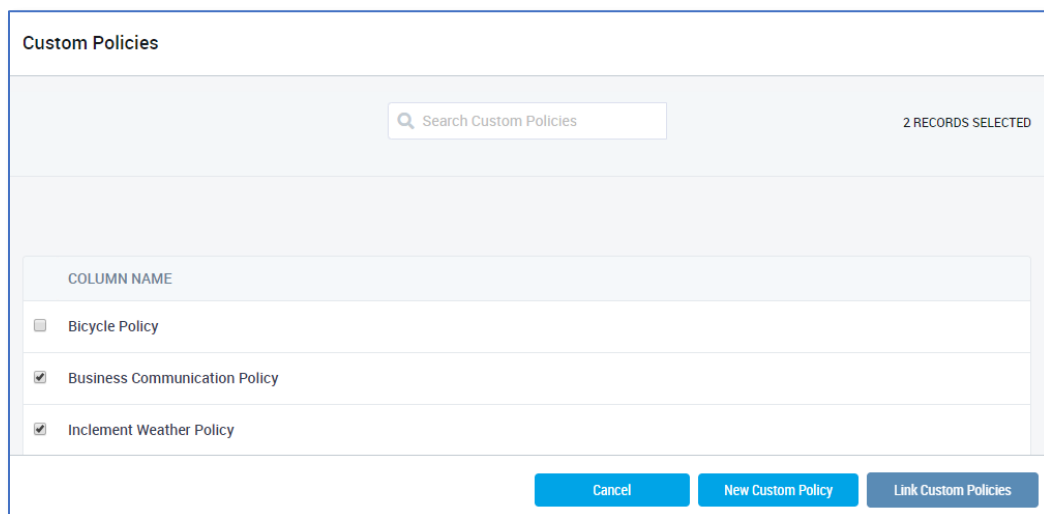
Populate the **Policy Language** text box with your custom language and click **Save Policy** when complete. Once you’ve created a custom policy, you will be able to view all custom policies created for your company in the **Custom Policies** section.



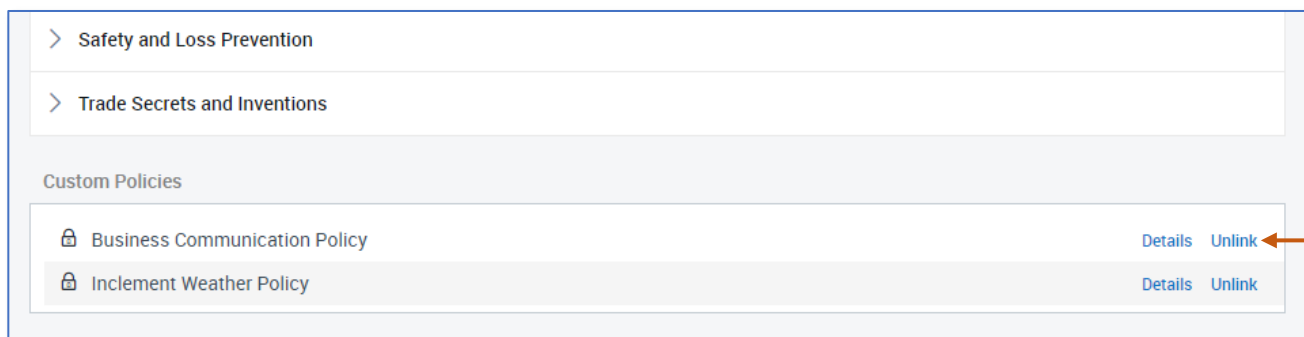
If you've already created a handbook and would like to add a new custom policy to it, find the handbook in the **Handbook Library** and access the **Table of Contents** section. Click the **Actions** button in the upper right corner to see a drop-down menu and choose **Link Custom Policy**.



All the custom policies that have been created for your company will be available, and you can choose which ones to add to that specific handbook. Once selected, click **Link Custom Policies** and the policies will be added.

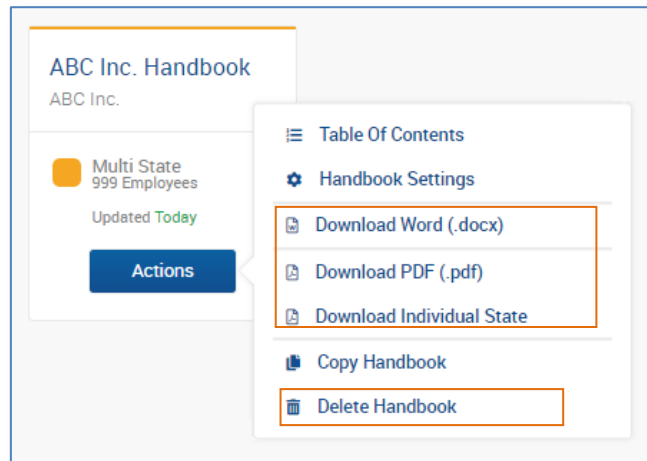


Any custom policies created and added to handbooks will follow all Core and State policies. You can remove a custom policy any time by clicking on **Unlink** next to the custom policy name.



## Downloading and Deleting

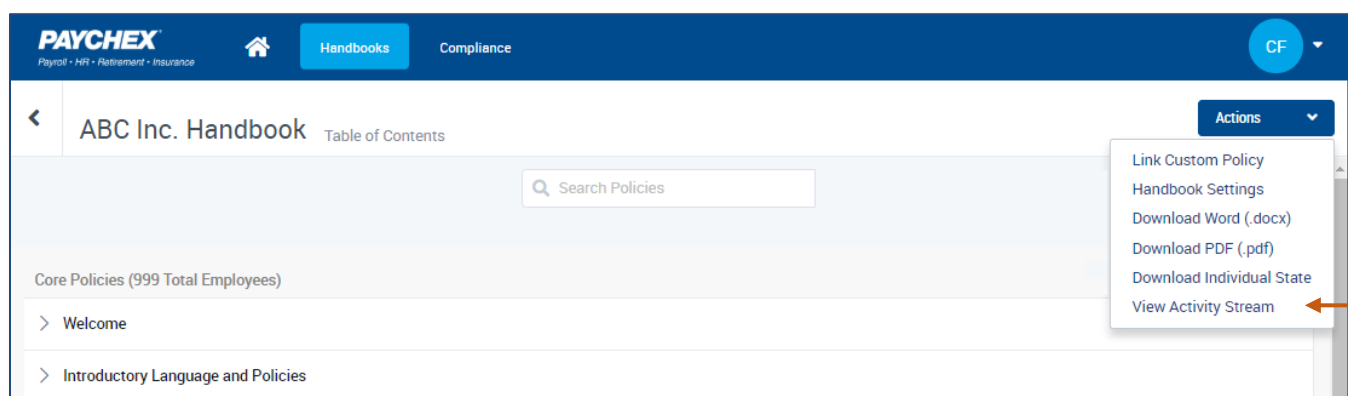
Once you have completed the edits and customizations for your living handbook, you can download the final version in either Word or PDF format. Locate your handbook in the **Handbook Library** and click on the **Actions** button to see download options. For **Multistate** handbooks, you can choose to download the entire document or a document that includes core policies and state policies for just one state. To do this, click on **Download Individual State**.



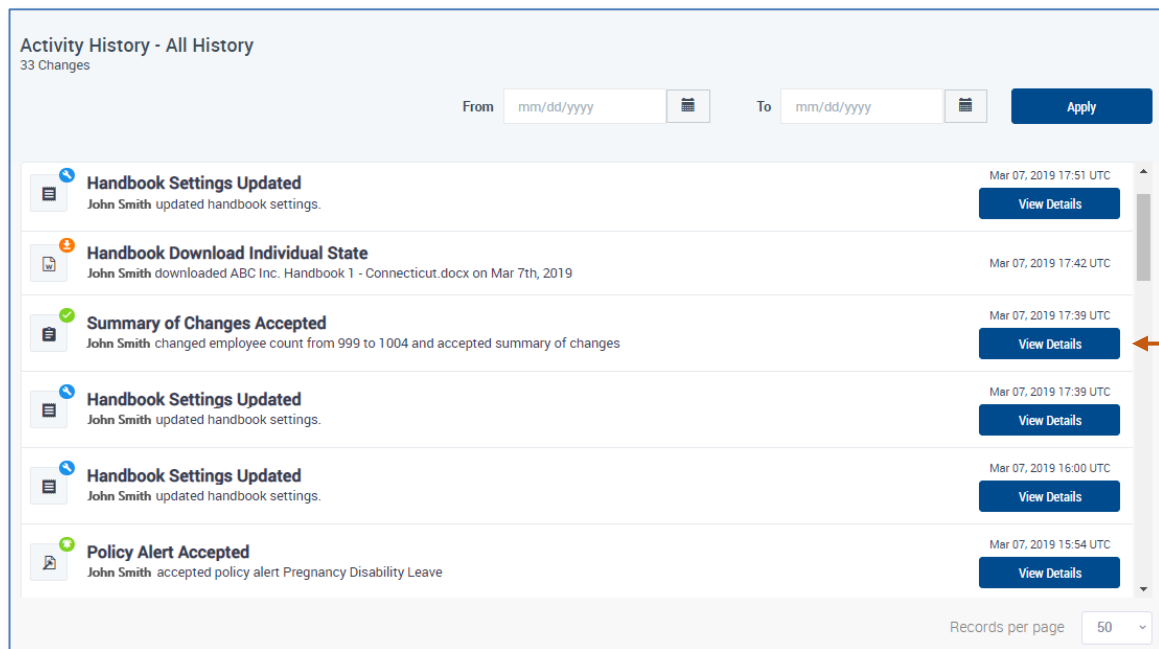
The **Actions** button also allows you to delete a handbook. Deleting a handbook will remove it from your **Handbook Library**. You may want to consider saving handbooks and naming them with an archival naming scheme (for example, ABC Handbook Archived Dec 2018 Do Not Use).

## Activity Stream

To see the activity history of your handbook, click on the **Actions** button at the top of the **Table of Contents** and select **View Activity Stream**.



All changes, updates, and downloads will be shown on this page. Click the **View Details** button to see specific information about each activity in the list.



When you view a document, the policy opens for you to review the current local or state laws, or any changes to company policies. Any differences between the last time the policy was added to the Handbook and the current version are automatically shown in the policy document. This lets you review the text differences between the current policy with the changes or deletions that have recently occurred.

## Recommendations

You can download handbooks in Word or PDF versions. We recommend you download your handbook in Word to review and make necessary adjustments or modifications before finalizing and distributing to your employees. Within Word, consider making the following edits:

- Search for the following items and update all necessary information as required:
  - Double square brackets (beginning brackets “[[”) and (ending brackets “]]”)
  - Any orange text
- Review for any grammar or spelling errors.

Once you’ve made all of your desired changes, save as a PDF for printing and/or electronic distribution.

The Employee Handbook Builder contains employment policies that are regularly updated and reviewed annually by national labor and employment law firm Constangy, Brooks, Smith & Prophete, LLP to help private employers create and maintain legally-compliant employee handbooks based on federal and state law. Policies that may be required for compliance with local laws and specific industries are not included in the Builder. Employers with specific circumstances, such as federal contractors/subcontractors, public, and unionized employers, should review the handbook with legal counsel to ensure applicability and inclusion of additional policies needed for their organizations. Any changes made to policies in the Builder could cause the handbook to be out of compliance and should be reviewed with legal counsel prior to implementation.

Neither Paychex, Inc. nor its subsidiaries or affiliates (collectively "Paychex") shall be responsible for client's compliance with federal, state, and local statutes, regulations, or ordinances. Client is solely responsible for complying with all applicable law. Paychex does not represent or warrant that materials provided comply with applicable federal and state laws and regulations or whether any client's use of a particular product functionality is appropriate or otherwise lawful. Any and all materials provided in this product are not intended as legal advice. If you have a specific problem, issue, or need for legal or financial advice, the services of a competent, relevant professional should be sought to address the particular situation. Paychex expressly disclaims any liability associated with a client's use of this product.

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