

# HUMAN RESOURCES DOCUMENTATION CHECKLIST

This checklist details core Human Resources documentation that buyers expect to review to evaluate continuity and risks.

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## **Organizational Structure**

- Organizational chart (current and planned)
- Role descriptions for all positions
- Employee dependency analysis
- Cross-training plans

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## **Employment Agreements**

- All employment contracts
- Independent contractor agreements
- Non-compete / non-solicit / confidentiality agreements
- Offer and termination letter templates

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## Compensation & Benefits

- Salary and wage schedules
- Bonus, commission, and incentive plans
- Equity, or profit-sharing plans – if applicable
- Benefits summaries
- Health, retirement, PTO, disability
- Deferred compensation or retention plans

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## HR Policies & Compliance

- Employee handbook
- Code of conduct
- Disciplinary and termination policies
- Remote work policies
- Health & safety policies
- DEI and harassment policies

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## Workforce Metrics

- Headcount by role and location
- Employee tenure and turnover
- Vacancy and hiring metrics
- Overtime and utilization data
- Absenteeism and leave records