

## AAHA PLANNING WORKSHEET

Target Date	Action
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| _____ | <b>1.</b> Skim the <i>AAHA Guide to Creating an Employee Handbook</i> to get a feel for the task at hand. Try to identify a style that is comfortable for your practice.   |
| _____ | <b>2.</b> Develop an outline of the elements that you think should be addressed in your employee handbook. Clearly establish the content, sequence, and organization of the handbook.  |
| _____ | <b>3.</b> Identify which management team members you will assign to develop which topics or provide the needed information. Share the appropriate sections in the <i>AAHA Guide to Creating an Employee Handbook</i> with these people. If you are creating this handbook as a personal project, confer with your accountant and lawyer for ideas and brainstorming. |
| _____ | <b>4.</b> Secure a joint agreement on the target date for each element of information or topic submission.   |
| _____ | <b>5.</b> Gather the information and topics that were developed, as well as supplemental needs identified in the management team development process.  |
| _____ | <b>6.</b> Organize the data as indicated in your draft outline. Be sure to add the appropriate sample statements from this guide.  |
| _____ | <b>7.</b> Prepare the first draft, using double-spaced type, and prepare a revised contents page.  |
| _____ | <b>8.</b> Submit the draft to qualified legal counsel for review of content, legal aspects, and completeness.  |
| _____ | <b>9.</b> Have the final draft printed out in ring-binder format.  |
| _____ | <b>10.</b> Distribute individual copies to all employees at a staff meeting; review the handbook and answer any questions.   |
| _____ | <b>11.</b> Inform employees where they can reference an electronic copy of the handbook.   |
| _____ | <b>12.</b> Establish target dates for the update review process.   |