PEOPLE OPERATIONS

FIELD GUIDE

The HR Department of One

A practical field guide for small and growing employers

Field Guide · By Marshall Varner · Revised working edition · November 2026

This is the guide I would want beside me when I was the only person responsible for HR. Start with the issue in front of you, follow the steps, document the result and ask for help when the decision needs specialist review.

How to use it

Find the relevant topic, work through the numbered steps, and use the companion Excel workbook to record owners, follow-up and recurring tasks. Keep employee-specific medical, investigation and identity information in restricted systems, not the workbook.

> **SCOPE AND CAUTION**
>
> This is an operational learning resource, not legal, tax, benefits or immigration advice. Requirements vary by employer, workforce, location and plan. Confirm the applicable rules and deadlines with authoritative sources or qualified advisers before acting. No statutory calendar or legislative news is included.

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TOPIC 01

Start with control, not a new handbook

Identify who is employed, who approves decisions, when payroll runs, and which employee issues are open.

How to do it

1. Obtain an active roster from payroll and compare it with managers' lists.
2. Confirm next payday, payroll cutoff, funding owner and backup.
3. Ask managers about pending hires, departures, injuries, complaints and leave.
4. Write down the next action, owner and date for every open item.

WHAT TO KEEP

An action register showing the five highest-risk items and the next 30 days of deadlines.

IN PRACTICE

A manager says a former employee is still receiving benefits. Confirm the termination date and carrier status, notify the responsible vendor and document correction.

PUT IT TO WORK

Next action	Owner	Follow-up date

TOPIC 02

Know the business you support

Make an employer profile before deciding what rules or processes apply.

How to do it

1. Record each legal employer, worksite and employee work state.
2. List employee categories and any staffing agency relationships.
3. Identify payroll, insurance, retirement and benefit vendors.
4. Record who may hire, change pay, sign contracts and approve terminations.
5. Ask qualified advisers to confirm jurisdiction-specific requirements.

> **WHAT TO KEEP**
>
> An employer profile with a named owner and review date.

> **IN PRACTICE**
>
> A remote employee plans to relocate. Hold approval until payroll, registration, insurance and local policy requirements are reviewed.

PUT IT TO WORK

Next action	Owner	Follow-up date

TOPIC 03

Build a simple HR operating rhythm

Protect daily service and recurring obligations instead of responding only to the loudest request.

How to do it

When	What to do
Daily	Review urgent concerns, new starts, exits and payroll cutoff.
Weekly	Review open cases, hiring and leave.
Each payroll	Reconcile changes and get independent approval.
Monthly	Compare HR, payroll and benefits rosters and review upcoming deadlines.
Quarterly	Sample records, test backup coverage and update manager guidance.

> **WHAT TO KEEP**
>
> A recurring routine checklist and a calendar containing only verified dates.

> **IN PRACTICE**
>
> If you are out unexpectedly, a backup should know how to approve payroll and escalate an urgent safety concern.

PUT IT TO WORK

Next action	Owner	Follow-up date

TOPIC 04

Hire with a clear business case

Make hiring consistent before the job is advertised.

How to do it

1. Get approval for budget, reporting line, location and schedule.
2. Write essential duties and job-related qualifications.
3. Review compensation, exemption status and applicable posting requirements.
4. Ask each candidate consistent questions and keep job-related notes.
5. Check whether screening requires disclosures, consent or an individualized review.

> **WHAT TO KEEP**
>
> An approved requisition, job description, interview record and selection rationale.

> **IN PRACTICE**
>
> Two candidates have different backgrounds. Compare both against the same required skills rather than informal impressions.

PUT IT TO WORK

Next action	Owner	Follow-up date

TOPIC 05

Turn an accepted offer into a good first day

Use a task owner and due date for every onboarding step.

How to do it

1. Confirm accepted terms, start date, manager and work location.
2. Assign equipment, access, timekeeping and training.
3. Send a welcome with arrival details and secure forms.
4. Follow current Form I-9 instructions and applicable new-hire reporting requirements.
5. Confirm first-pay accuracy and benefits enrollment.
6. Schedule employee and manager check-ins at roughly 30, 60 and 90 days.

> **WHAT TO KEEP**
>
> An onboarding checklist with evidence of completion and follow-up.

> **IN PRACTICE**
>
> The employee cannot log time on Day 1. Give an approved alternate time record and fix access before the first payroll.

PUT IT TO WORK

Next action	Owner	Follow-up date

TOPIC 06

Make every payroll predictable

Payroll is not complete just because the provider processed it.

How to do it

1. Confirm hires, exits, approved pay changes, time and leave.
2. Compare this run with the prior run and investigate unusual amounts.
3. Check benefit deductions, retirement elections and garnishment orders with authorized reviewers.
4. Obtain independent approval before release.
5. Confirm payment, tax deposit and vendor transmission evidence.
6. Correct errors promptly under the rules that apply.

WHAT TO KEEP

A payroll review log, exception list, approval and post-run reconciliation.

IN PRACTICE

An employee reports a missing overtime payment. Review actual hours and earnings codes, calculate the correction and confirm the required payment timing.

PUT IT TO WORK

Next action	Owner	Follow-up date

TOPIC 07

Keep compensation and time records defensible

Pay decisions need consistent reasons and accurate hours.

How to do it

1. Define the work and compare pay with similar roles.
2. Document job classification and review actual duties, not just title.
3. Make timekeeping accessible for all compensable work.
4. Review bonuses, commissions and other earnings for payroll treatment.
5. Get approval for pay changes and communicate the effective date.

WHAT TO KEEP

Job descriptions, pay approval records, classification review and accurate time records.

IN PRACTICE

A salaried employee starts supervising a team. Recheck the role and applicable exemption criteria rather than assuming salary means exempt.

PUT IT TO WORK

Next action	Owner	Follow-up date

TOPIC 08

Run benefits without losing the details

Know the plan documents, enrollment rules and vendor handoffs.

How to do it

1. Inventory health, dental, life, disability and retirement plans.
2. Record eligibility rules, plan years, contacts and enrollment methods.
3. Compare employee elections with carrier and payroll deductions.
4. Track qualifying events and departures through completion.
5. Verify notices, continuation coverage and plan-specific obligations with the broker or administrator.

WHAT TO KEEP

A benefits reconciliation, vendor contact list and event tracker.

IN PRACTICE

An employee adds a dependent. Confirm eligibility, documentation, enrollment confirmation and the correct payroll deduction.

PUT IT TO WORK

Next action	Owner	Follow-up date

TOPIC 09

Handle time off and accommodation requests consistently

Respond to the request before deciding which form or law applies.

How to do it

1. Acknowledge the request and ask what work or time off is needed.
2. Review company policy and applicable jurisdiction, leave and accommodation requirements.
3. Keep medical details in restricted records.
4. Coordinate with the employee and manager on scheduling and work adjustments.
5. Confirm the decision, dates, next check-in and return-to-work process.

WHAT TO KEEP

A coded case record, documented communications and calendar reminders.

IN PRACTICE

An employee says treatment makes their schedule difficult. Ask about work limitations and needed adjustments, not a broad medical history.

PUT IT TO WORK

Next action	Owner	Follow-up date

TOPIC 10

Listen, investigate and follow through

Employee relations requires impartial fact-finding and prompt follow-up.

How to do it

1. Listen without promising an outcome or absolute confidentiality.
2. Assess immediate safety, retaliation and preservation needs.
3. Decide who can investigate impartially; use outside help for conflicts.
4. Interview relevant people, collect records and test inconsistencies.
5. Document findings, decide proportionate action and communicate next steps.
6. Monitor for retaliation.

> **WHAT TO KEEP**
>
> A restricted case file, findings record and follow-up owner.

> **IN PRACTICE**
>
> A complaint concerns the founder. Do not ask the complainant to resolve it with the founder; use an independent escalation route.

PUT IT TO WORK

Next action	Owner	Follow-up date

TOPIC 11

Support performance before problems escalate

Managers should provide clear expectations, evidence and coaching.

How to do it

1. Define expected results and behaviors.
2. Ask the manager for specific examples, dates and prior feedback.
3. Hear the employee's perspective and consider training, workload or support gaps.
4. Agree on measurable improvements and check-in dates.
5. Review decisions for consistency and potential protected activity.

> **WHAT TO KEEP**
>
> A short coaching record or improvement plan with a scheduled review.

> **IN PRACTICE**
>
> Replace "poor attitude" with specific conduct, its impact, and the expectation going forward.

PUT IT TO WORK

Next action	Owner	Follow-up date

TOPIC 12

Keep policies and records usable

Policies should explain how work actually happens and records should be accessible only to authorized people.

How to do it

1. Maintain a current policy index with an owner and version date.
2. Train managers on reporting, timekeeping, leave and escalation.
3. Separate personnel, medical, I-9 and investigation records where appropriate.
4. Set retention schedules with legal review.
5. Test access rights and hold relevant records when a claim or investigation is anticipated.

WHAT TO KEEP

A controlled policy library, access matrix and retention schedule.

IN PRACTICE

A manager requests an employee's medical documentation. Share only the work restriction or adjustment information the manager needs.

PUT IT TO WORK

Next action	Owner	Follow-up date

TOPIC 13

Make safety part of ordinary operations

The first response to a hazard is protection, not paperwork.

How to do it

1. Identify immediate danger and activate emergency response.
2. Make sure employees know how to report injuries and hazards.
3. Record incidents and arrange required reporting with safety advisers.
4. Investigate root causes and assign corrective actions.
5. Review training, workers' compensation contacts and return-to-work coordination.

> **WHAT TO KEEP**
>
> An incident log with restricted supporting records and a corrective-action owner.

> **IN PRACTICE**
>
> After a slip, secure the area, arrange care, preserve facts and address the underlying hazard.

PUT IT TO WORK

Next action	Owner	Follow-up date

TOPIC 14

Handle departures with dignity and control

A separation requires coordinated employee, payroll, benefits and access handoffs.

How to do it

1. Confirm the reason, decision authority and any legal review needed.
2. Determine final-pay, leave payout, notice and benefit obligations by work location.
3. Prepare a clear meeting and written next steps.
4. Coordinate equipment, access, customer ownership and records preservation.
5. Confirm payroll, carrier and retirement updates and answer employee questions.

> **WHAT TO KEEP**
>
> A separation checklist with completion evidence and assigned owners.

> **IN PRACTICE**
>
> When an employee resigns with little notice, protect pay and benefits processing first, then coordinate systems and equipment.

PUT IT TO WORK

Next action	Owner	Follow-up date

TOPIC 15

Use vendors and advisers without surrendering ownership

The provider performs tasks; the employer must know what was completed.

How to do it

1. List each vendor’s scope, contacts, deadlines and escalation route.
2. Identify who prepares, approves, submits and verifies each obligation.
3. Request confirmation records, not verbal assurances.
4. Review errors, fees and missed deadlines regularly.
5. Maintain a backup process for provider outages.

> **WHAT TO KEEP**
>
> A vendor responsibility matrix and escalation list.

> **IN PRACTICE**
>
> The payroll provider says taxes are handled. Ask for deposit and filing confirmations and reconcile them with the ledger.

PUT IT TO WORK

Next action	Owner	Follow-up date

TOPIC 16

Give leadership a useful HR picture

Report decisions and risks without exposing unnecessary employee details.

How to do it

1. Summarize staffing changes, hiring status, payroll accuracy, open operational risks and upcoming decisions.
2. Separate facts from assumptions.
3. Describe each issue, consequence, recommendation and decision needed.
4. Assign owners and follow up on commitments.

WHAT TO KEEP

A one-page monthly people-operations update.

IN PRACTICE

Instead of naming an employee in a board update, report that an open case requires independent review and has a defined next step.

PUT IT TO WORK

Next action	Owner	Follow-up date

TOPIC 17

Your first 90 days

Build the minimum reliable system, then improve it.

How to do it

When	What to do
Days 1 to 10	Establish roster, payroll controls, urgent cases and authority.
Days 11 to 30	Verify employer profile, vendor handoffs, onboarding and separation workflows.
Days 31 to 60	Test routine checklists and record access; coach managers.
Days 61 to 90	Audit a sample of cases and payroll runs, close gaps and present a realistic improvement plan.

> **WHAT TO KEEP**
>
> A prioritized 90-day plan, not an oversized policy rewrite.

> **IN PRACTICE**
>
> If only one major project can be completed this quarter, choose the gap with the greatest employee impact and operational risk.

PUT IT TO WORK

Next action	Owner	Follow-up date

BEFORE YOU CLOSE AN ISSUE

A simple decision check

Before you close any HR issue, ask:

Question	Your answer
What happened?	
What rule or policy applies?	
What information is missing?	
Who approves the decision?	
What does the employee need to know?	
What evidence will show that the task was completed?	
When will we check again?	

Use the workbook

The workbook includes an employer profile, routine calendar, onboarding checklist, payroll controls, employee-case register, action tracker and jurisdiction review. Dates and applicability must be confirmed for the specific employer.

> ABOUT THIS GUIDE
>
> This is an operational learning resource and general educational guide, not legal, tax, benefits, immigration or other professional advice. Requirements vary by employer, workforce, location and plan. Confirm the applicable rules and deadlines with authoritative sources or qualified advisers before acting. Keep employee-specific medical, investigation and identity information in restricted systems.
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