

Step 24 · Records

Frequently Asked Questions

What should go in a basic employee handbook?

Start with clear expectations for the work: attendance, duties, food safety, customer service, phones, dress, and staff discounts. Add the employment policies your business requires with qualified local help. A borrowed template can suggest topics, but its rules may not fit your workplace or the law. Keep the current version available, explain it during training, and record that employees received it.

How should I record cash sales alongside card payments?

Record every sale, including cash, in a reliable system that feeds your books. Reconcile the till, refunds, paid-out cash, and deposits so the figures can be explained. Do not delete or hide cash transactions to reduce reported sales. Keep supporting records and have your accountant confirm the reporting method. Paying someone in cash does not decide their employment or tax classification.

A business client asked for a W-9. What should I send?

For a valid U.S. request, use the current IRS Form W-9 and its instructions to provide the correct name, tax classification, and taxpayer identification number. The client uses this information for applicable tax reporting. Verify the recipient and send it securely; it contains sensitive information. Ask your tax professional if the correct classification or number is unclear.

How should I document a conversation about an employee's performance?

Keep a dated, factual note of what was reported, what you verified, the employee's response, and the expectations and follow-up agreed. Separate firsthand observations from someone else's account. Check that the employee understood the procedure and had the support to follow it. Restrict access to the record, and get qualified employment advice when discipline, leave, accommodation, or dismissal may be involved.

Educational guidance. Check your own circumstances with the appropriate local professional.