ACACIA HR solutions

BENEFITS GUIDEBOOK

Purpose
The Client Guidebook is a living document designed to centralize all HR-related processes, contacts, and compliance information for each client. It ensures continuity, supports smooth transitions between team members, and provides clients with a clear understanding of how their HR support is structured.

How to Fill It Out

Start with Company Basics

Complete the About. History, and Number of Employees sections.

Use the company's website for the overview

Add Contacts & Roles

List key client contacts (HR, payroll, benefits).

Specify Acacia's lead and support staff for the account.

Document Systems & Tools

Record platforms used for payroll. benefits, HRIS, and communication

Include links and login instructions (but never store passwords here).

Aultine Processes Clearly

Capture payroll steps, time-off request flow, and onboarding/offboarding checklists.

Outline Processes Clearly

Capture payroll steps, time-off request flow, and onboarding/offboarding checklists.

Keep them short and step-based

Summarize Benefits & Policies

Enter providers, eligibility rules, and employer contribution percentages.

Link to benefits guides retirement SOPs, and compliance docs.

Build the Compliance Calendar

Note annual or quarterly deadlines (5500, ACA. Medicare, etc.).

This section should be reviewed and updated annually.

Best Practices

- Keep information general but specific enough to be actionable.
- Update the guidebook whenever a system, provider, or policy changes,
- Share a copy with both the Acacia team and the client point of contact.
- Use embedded links for supporting documents instead of pasting content.

CLIENT GUIDEBOOK

(Sample Version with Generic Example

Lead: Jane Smith   Suppert: Alex Johnson

ABOUT

Acme Co: is a regional technology.consulting firm supporting smalr-to mid-sized businesses with iT infrastructure andoffware solutions

For a better understanding of their services, click here. www.acmeco.com.

NUMBER OF EMPLOYEES

Acme Co: currently has 42 employees, All employees are fult-time exempr except for two part-time, non-exemt.

SPECIAL TASK

Assist with quarterly compliance reporting.

CLIENT-SPECIFIC TASK

Support bi-annual compensation bemhchar.

SYSTEMS AND TOOLS

Emall:

- Mail access: ww.acmeco.com

Communication accurs via Acacia (enal and HR Business Partner emalls.

Chat:

Platform. Microsoft Teams

PROCESS FLOWS

Client Documents: [Link]

- Employee Handbook [Link] Offer Letter Template [Link]
- Payroil Calendar [Link]
- Hoilday List [Link]

OIARFER A:

Open Prorod pern recuexies	Deat BOB Officare anv Japproval.
- Vacation	

BENEFITS MANAGEMENT

System: Ease Benefits

Acacia Handles: Acausa

- **New hire enroliment**
- Open emoliment admininistration
- Processing qualifying events
- Monthly audits
- ACA reporting
- Reviewing Invoices

MEDICAL / DENTAL / VISION

Providers:

- Blue Shield (Medical)
- Delta Dental (Dental)
- **VSP** (Vision)

General Info:

- Employees First of the of month following 30 days of employmem
- Employer Contribution: 75% of employee premiums, 50% of dependent prejuims

RETIREMENT

Provider: Fidelity 401(k)

General Info:

- Eligibility: **After** 90 days of employment.
- Employer Match: 4%
- Retirement SOP: Link ⏎
- 401(k) Guide: Link ⏎

PROCESS FLOWS

Client Documents:

- Employee Handbook [Link]
- Offer Letter Template [Link]
- Payroll Calendar [Link]
- Holiday Pait [Link]

COMPLIANCE CALENDAR

Quarter 1:

- Open Enrollment
- 401(k) Compliament

Quarter 2:

- State Poster Updates

ABOUT

[Insert Company Overview]

For a better understanding of organization's work, click here [[Insert Link.]

HISTORY AND CURRENT RESPONSIBILITIES

This client has outsourced HR solutions to Acacia since [Year].

Currently, we serve as the client's full HR support including payroll, benefits.

CONTACT INFO

[Insert Contact Information]

NUMBER OF EMPLOYEES

The organization currently has [#] employees. All employees are full ime excempt except for [#] part-time, nor-explyees.

SPECIAL TASK

[Insert Special Task]

CLIENT- SPECIFIC TASK

SYSTEMS AND TOOLS

Email: [Insert System Name]

Web Address: [insert Web Address]

Payroll / HRIS: Payroll runs a bi-weekly sharcule. The majority of employees are salaried, with a few hourly.

Payroll Process Overview:

- On payroll week, the HR Generalist requests hours from [Client Contact].
- Generalist updates Payroll Changes Tracker with non-exempt hours,

  Hours are entered into the HRIS/payroll system

  Payroll EET amount is sent to [Client Contact] for approval.

[Insert [Por approved payrolls submitted.

[Insert Link to Payroll Changes Tracker]

[Insert Link to Payroll Process]

BENEFITS MANAGEMENT

System [Insert Benefits Platform]

Benefits are managed by [Client Contat /Role]. with acacia having employer access to the benefits system.

Acacia's responsibilities include:

- New hire enrollment
- Open enrollment admiliministration
- Processing qualifying events
- Monthly audits

  ACA reporting

  Reviewing invoices

TIME OFF POLICY

Vecation	Voca.ttions
Employees reseive [#] aye of sick arinually.	Employees resceive [#] days of vacation annualy
	Newtures receive prroretation vacation based on fitre date.
Employer arelv simalik cannot be taken prob. per. [#] days:	Vacation generally cannot be taken during the probationary period of [#] days.
	SCA Leave
	Employees reseeve [#] days of ack veve anually.
Request Procedure	**Request Procedure**
[Insert Link to Procedare/Plot]	[Insert Link to Preciduure unit]
	[Insert Link to Rerciizrrent

PROCESS FLOWS

Client Documents:	[Inset Provider]
Employer Handbook [inssi Linki	[Inset Corrercral Contact info]
	[inser Link to Payroul Process]
Offer Letter Template.	[Insert Compliance Tasks]
	!insert Link to Benerfitems]

COMPLIANCE CALENDAR

Qua.	Quarte. 2
Open rrulment	[Insert Compliance Tasks]
40[lk] Compliance Testing	550&l Filing for 30 llk] P

Quarter 2:
[insert Compitilance Tasks]

Quarter 3rc rp.OOk]
[Insert Link to Benefits dvide]