

HVAC Employee Handbook

This template is a general starting point for information only — it is not legal advice. Employment, wage, leave, and at-will rules vary by country, state, and city and change over time. Have a qualified employment attorney review and tailor this handbook before you distribute it, and delete any policy that does not apply to your organization.

1. Welcome

Welcome to {{Company Name}}. As an HVAC {{technician / installer / team member}}, you represent us in customers' homes and businesses every day, and our reputation rides on safe, honest, high-quality work. This handbook explains how we work together and the rules we all follow — on safety, vehicles, on-call, and conduct. {{Add a line or two about your company's story and the standard of service you expect.}} It is not a contract and does not cover every situation; when you are unsure, ask your {{supervisor / dispatcher}}.

Open with a short, genuine welcome and one or two lines on your mission and values. This sets the tone before the policies begin.

2. Employment Basics

- Equal opportunity: {{Company Name}} is an equal opportunity employer and does not discriminate on the basis of any characteristic protected by applicable law.
- Employment relationship: {{Describe your employment relationship — e.g., employment is at-will where permitted by law, meaning either party may end it at any time, with or without cause}}.
- Employee classifications: {{Define full-time, part-time, temporary, and exempt vs non-exempt as you use them}}.
- Probationary / introductory period: {{Length and what it means, if you use one}}.

At-will employment is not valid everywhere — outside the US, and in some agreements, different rules apply. Confirm the correct wording for every location you employ people with your attorney.

3. Code of Conduct

- Treat every customer and co-worker with respect and professionalism; we do not tolerate harassment, bullying, or discrimination of any kind, including conduct based on any characteristic protected by applicable law. Report concerns to {{your supervisor / owner}}, and we {{do not tolerate retaliation}} for a good-faith report.
- You are a guest in the customer's home or business: protect their property, lay down drop cloths, clean up your work area, and never enter areas outside the scope of the job.
- Be honest in every diagnosis, quote, and invoice. Only recommend and sell work the customer

actually needs; falsifying a diagnosis, padding an invoice, or doing unauthorized work is grounds for {{discipline up to termination}}.

- Wear the company {{uniform}} and ID, keep a clean and professional appearance, and be on time to every appointment; if you are running late, {{call dispatch and the customer}}.
- Represent the company well: no foul language, smoking/vaping, or personal phone use in front of customers, and {{follow our policy on accepting cash, tips, or side jobs}}.
- Side jobs and moonlighting: {{state your policy — e.g., no service work for our customers outside the company, and disclose other employment}}.

Cover professional behaviour, anti-harassment and anti-discrimination, attendance, dress, and conflicts of interest. Say how to report a concern and state a clear no-retaliation commitment.

4. Working Hours, Pay & Timekeeping

- Record all time worked accurately each day using {{the field-service app / time clock}} — clock in at your first job or the shop as your role requires, and clock out at the end of the day. {{Define whether drive time, shop time, and time between jobs are paid, consistent with the wage-and-hour law where you work.}}
- Non-exempt technicians earn overtime as required by {{the law where you work}}; get {{supervisor}} approval before working over {{the overtime threshold}}. Off-the-clock work is never allowed.
- We pay {{weekly / every two weeks}} on {{payday}} by {{direct deposit}}. {{Describe how piece-rate, commission, or spiffs work, if you use them, and confirm total pay always meets at least minimum wage for all hours worked.}}
- On-call / standby: technicians share an on-call rotation for {{after-hours and weekend emergency calls}}. {{Describe how on-call is scheduled, how standby and call-out time are paid, and the expected response time}} — on-call pay rules vary by state, so set this with care.
- Take the meal and rest breaks {{required where you work}}; do not skip a required break to finish a call.
- Report your hours, mileage, and materials used on each job the same day so we can invoice accurately. If your pay looks wrong, tell {{the office}} that week so we can fix it.

State the standard schedule, pay periods, how overtime is handled for non-exempt staff, and how time is recorded. Wage-and-hour rules are heavily regulated — match them to your jurisdiction.

5. Time Off & Leave

- Paid time off: {{describe PTO or vacation, how it accrues, and how to request it}}. Request time off in {{the scheduling system}} at least {{notice period}} ahead so we can cover your calls.
- Sick leave: {{describe paid or unpaid sick time and how to call in; many states and cities require paid sick leave — follow the rule where you operate}}. Do not run service calls when you are too ill or impaired to work safely.

- Holidays: {{list the holidays you observe and how holiday and emergency-holiday-call pay works}}.
- Legally required leave — family, medical, jury duty, military, voting — {{describe what applies to a business your size; some laws cover only larger employers, so confirm what applies}}.
- Report an on-the-job injury immediately (see Safety); workers' compensation and any related leave are handled per {{your state's law}}.

List paid time off, holidays, sick leave, and any legally required leave (such as family, medical, or jury duty). Required leave varies widely by location — verify each entitlement before you publish.

6. Benefits Overview

This section summarizes the benefits {{Company Name}} offers, including {{health insurance, retirement plan, and any others}}. Official plan documents govern in all cases; where this summary and a plan document differ, the plan document controls. {{Describe eligibility and enrolment.}}

Keep benefits descriptions short and point to the official plan documents for detail. Never let the handbook contradict an insurance or retirement plan document.

7. Workplace Health & Safety

- Safety comes first, every job. Follow lockout/tagout before servicing powered equipment, test before you touch, and never bypass a safety control. Refusing to work in a genuinely unsafe condition will never be held against you.
- Wear the required PPE for the task: safety glasses, gloves, hearing and fall protection, and a respirator where needed. {{List the PPE the company provides and what the technician supplies.}}
- Handle refrigerant lawfully: only EPA Section 608–certified technicians recover, charge, or handle refrigerant; recover — never vent — refrigerant, and keep your certification current. {{Note who pays for certification and how recovery is logged.}}
- Work safely with the hazards of the trade: electrical, gas (watch for leaks and follow combustion-safety/CO checks), brazing and hot work, ladders and rooftops (fall protection over {{height}}), confined spaces, and heavy lifting — get help or use equipment for heavy units.
- Report every injury, near miss, vehicle incident, or property damage to {{your supervisor / the office}} the same day, however minor, so we can give first aid and document it. Know what to do for a gas leak, a refrigerant exposure, or a customer medical emergency.
- Drive safely: obey traffic laws, no phone in hand while driving, wear your seatbelt, and secure tools and cylinders in the vehicle. We maintain a {{drug- and alcohol-free workplace}}; reporting impaired or using on the job is grounds for {{termination}}, and we {{test per our policy and applicable law}}.

Cover how to report injuries and hazards, emergency procedures, and any safety rules specific to your workplace. Reference the safety regulations that apply to your industry by name.

8. Technology & Acceptable Use

- Company vehicle: the truck or van assigned to you is for company business; keep it clean, locked, and maintained, report problems and damage promptly, and follow our policy on {{personal use, passengers, and taking the vehicle home}}. A valid driver's license and an acceptable driving record are conditions of any driving role.
- Company tools and equipment: meters, gauges, recovery machines, and stock are company property; track them, keep them in good order, and return everything on departure. {{State your policy on tool allowances and who replaces lost or broken tools.}}
- Fuel cards, parts accounts, and company credit: use them only for authorized company purchases and keep every receipt. Personal use of a company account is taken seriously.
- Use the {{field-service / dispatch app}}, customer accounts, and devices for work; log in under your own account, capture accurate notes, photos, and signatures, and never share your login.
- Protect customer information — addresses, gate and alarm codes, payment details, and the fact that they are away. Never write down full card numbers, share customer data, or take it home, and follow our payment-card and privacy rules.
- Do not post photos or comments about customers, their homes, or job sites on social media; {{point to your social-media policy}}. Report a lost phone, tablet, or company device immediately.

Set expectations for company devices, accounts, email, and data. Be clear about what is monitored and what is private, and reference your data-protection obligations.

9. Confidentiality & Company Property

Employees are expected to protect {{Company Name}} confidential information, customer data, and intellectual property during and after employment, and to return all company property on departure. {{Reference your confidentiality or IP agreement where one applies.}}

Tie this to any separate confidentiality, IP-assignment, or data-protection agreement employees sign, rather than restating it all here.

10. Discipline & Leaving the Company

This section describes how {{Company Name}} addresses performance and conduct issues and what happens when employment ends — including notice expectations, final pay handled per applicable law, return of property, and any exit steps. {{Describe your progressive-discipline approach, if you use one, and keep it consistent with the at-will language above.}}

If you describe a progressive-discipline process, add that the company may depart from it at its discretion — otherwise it can be read as a promise that undercuts at-will employment.

11. Acknowledgement of Receipt

I acknowledge that I have received and read the {{Company Name}} Employee Handbook. I

understand it summarizes current policies and is not a contract of employment, that employment is {{at-will, where permitted by law}}, and that {{Company Name}} may update these policies at any time. I agree to follow the policies it describes.

Employee Name: _____ Signature: _____ Date: _____	Date Name: _____ Signature: _____ Date: _____

Have every employee sign and date this page, and keep the signed copy on file. It is your record that the handbook was received and understood.