



Employer Documentation Kit

This kit contains essential documentation to help you maintain sound record-keeping systems on employment matters.



Library of Documents

No	Document name	Use to...
00	Using the Employment Documentation Kit Procedure	Work with your kit contents, including saving files for each team member and working with the documents This is your starting point
01	Employment Relations and Holidays Act Checklist	Check your existing systems comply with the law, and that your managers and team members understand the changes
02	Employee Personal File Checklist	Check that relevant documents are in place on an employee's file
03	Employee Personal File Tabs	Organise each employee's personal file
04	Team Member Handbook	Create your own guide with key information for new / existing team members about your policies and expectations of team members
Recruitment		
05	Position Analysis Form	Analyse what is involved in a position - this will help in developing the position description
06	Position Description Form	Create a position description, which lists skills, experience and other requirements
07	Reference Check Form	Record details of your reference checks when recruiting
08	Offer of Employment Letter	Formally advise the successful applicant of the offer of employment and start date
09	Unsuccessful Applicant Letter	Advise other applicants that they have been unsuccessful in their application for a position
Induction		
10	Pre-Induction Checklist	Make sure all the necessary items and equipment are in place before the new team member starts
11	Induction Itinerary and Checklists	Plan itinerary for the initial day(s) and check that relevant tasks have been completed as part of the employee's induction
12	New Team Member Form	Record team member's contact details, bank details, etc
13	Team Member Change of Details Form	Record changes to team member's details.
14	KiwiSaver - Formal Acknowledgement Form	Record team member's decision to opt in or opt out of KiwiSaver
15	KiwiSaver Employee Information Summary Form	Record team member's decisions to opt in or out of KiwiSaver and any employee contributions made
16	KiwiSaver - Letter Confirming Continuation	Confirm to team member they have opted to continue KiwiSaver
17	KiwiSaver - Letter Confirming Opt Out	Confirm to team member that they have opted out of KiwiSaver
Trial/Probation		
18	Trial and Probation Guide	Provide key information to you about trial and probation periods
19	Review Form - Week 4	Review team member's performance at the 4 week point
20	Review Form - Week 8	Review team member's performance at the 8 week point
21	Review Form - Week 12	Review team member's performance at the 12 week point prior to confirmation or termination
22	Employment - Letter Confirming Position	Confirm appointment upon successful completion of probationary period
Remuneration		
23	Salary Review Form	Record outcome of salary review and details of increase if relevant
24	Salary Document of Variation Form	Record change in remuneration paid to team member
25	Remuneration Benefits	Record benefits such as health insurance, vehicle, commission and pension paid to team member
26	Employee Expense Reimbursement Claim	Claim expense reimbursement

No	Document name	Use to...
Employment History and Skills Record		
27	Employment History with Current Firm	Record team member's employment history with current firm
28	Employment History Prior to Current Firm	Record team member's employment history prior to them joining current firm
29	Skills and Qualifications Record	Record employees skills and qualifications
Training and Development		
30	Training and Seminars Planner	Plan training and seminars for team using a calendar
31	Training Record	Record training attended by individual team members
32	Course Request form	Request a training course or seminar for a team member or a team
33	Course Review form	Record individual's comments on course or seminar attended
Career Development / Performance Appraisal		
34	Career Development Form	Complete (by team members and reviewers) as part of performance appraisal / career development
35	Career Development - Supervisor Evaluation of Team Member	Complete (by supervisors) prior to career development / performance review
36	Career Development Action Form	Record action items determined during the career development process
37	Career Development Review Salary Letter	Confirm salary increase as a result of career development / performance management review
Leave and Sick Leave		
38	Annual Leave Planner	Plan annual leave for team using a calendar
39	Application for Leave	Apply for any leave (annual, sick, bereavement, etc)
40	Holidays Cash Up Request	Request to cash up annual holidays
41	Transfer of Public Holidays Request	Request and agree a transfer of a public holiday
42	Absence and Lateness Record	Record a team member's sick leave and lateness and deductions from pay (if applicable)
Grievance		
43	Grievance Form	Record a grievance and the agreed solution
Resignation and Termination		
44	Acceptance of Resignation letter	Advise team member of formal acceptance of their resignation
45	Termination of Employment letter	Confirm termination of employment, listing the reasons
46	Employee Leaving Checklist	Check that items are returned, paperwork is provided and security changes are considered
Other		
47	Response to request for union access to the workplace	Formally respond to a request from a union to gain access to the workplace