Template – Workforce information records

For each employee, compile a file containing the following items.

FILE

A copy of their job description and conditions of employment.

A copy of their employment contract and letters of appointment.

Administration

A copy of their completed and signed induction form.

Tax declaration forms, superannuation forms.

Contact details, next of kin details.

Training and development

A copy of their tickets, certificates, qualifications and licences.

A list of their training or education needs, updated as training is completed.

Performance management records

A description of the employee's career goals or things that motivate them.

A job performance appraisal for each year (or appraisal period).

Performance management form.

For each department/group of employees where appropriate, compile a file containing the following items.

FILE

An organisational chart for the department/group and a copy of the chart for the whole company which incorporates all departments/groups.

A team training plan – essential tickets, licences, training, OHS requirements etc.

Current goals and an operational plan that includes goals, progress and rewards for the group.

A record of the progress of the group towards achieving these goals.

A list of potential rewards for the group when goals are achieved.

A list of preferred labour suppliers if outsourcing is used (you may use a particular temp agency for secretarial employees, or a labour hire agency for warehouse employees).

For the business, compile a file (hard copy or electronic) containing the following items.

FILE

A set of all job descriptions.

A copy of the current organisational chart, with names of employees in each position.

A list of all current contact details of employees within the business and next of kin/emergency contact details.

Standard operating procedures and policies.

Rosters.

Leave policies and application forms.

OHS requirements, special permits/licences (including accident and incident templates).