

# Workforce documents checklist

(insert organisation / logo)

## For each employee, file the following items

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  
Copy of the [Fair Work Information Statement](#) provided to the employee on commencement

### 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 team/group of employees where appropriate, file the following items

An organisational chart for the team/group and where it fits in with the whole company.

A team training plan – essential tickets, licenses, training, Work Health and Safety requirements etc

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

A record of the group's progress 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 temporary agency for secretarial employees, or a labour hire agency for warehouse employees)

## For the business, file (hard copy or electronic) the following items

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 and next of kin/emergency contact details

Standard operating procedures and policies

Rosters

Leave policies and application forms

WHS requirements, special permits/licenses (including accident and incident templates)