# Workforce documents checklist (insert organisation / logo)

| **For each employee, file the following items** |
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| 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](http://www.fairwork.gov.au/employee-entitlements/national-employment-standards/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** |
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| 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 Saftety 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** |
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| 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) |