



Personnel Policies, Checklists, and Agreements

HR That Works contains more than 220 personnel forms. Use this list as a quick reference guide to finding the tool you need today. The forms with an asterisk (*) are typically included with an employee handbook. Remember, most of the employee forms are also available in Spanish.

COMPANY OVERVIEW

- Sample Mission Statement*
- Sample Code of Ethics*
- Business Ethics and Conduct Disclosure Statement
- Team Commitments*
- Company Organization Chart (PPT)

HIRING PROCESS

- Hiring Process Flowchart
- Why Should I Work For You?
- 19 Strategies for Hiring the Best
- Job Description Template
- Team Interview Log
- Applicant Flow Log
- Summary of the Uniform Testing Guidelines
- Hiring Checklist
- Our Hiring Process
- First Impressions Checklist
- Position Request Form
- Notice of Job Opening
- Employment Application
- Employee Reference Request & Release
- Pre-Hire Reference Check
- Pre-Interview Questionnaire
- Sample Pre-Interview Questionnaire for VP of HR at a technology firm.
- Interview Questionnaire
- Interview Preparation
- Questions to Avoid During an Interview
- Applicant Appraisal Form
- Co-Employee Applicant Appraisal Form
- "At Will" Policy*
- Checklist for Compliance With Consumer Credit Laws
- Pre-Employment Information Disclosure Notice and Acknowledgement
- Certification Cover Letter
- Pre-Adverse Action Disclosure Letter
- Adverse Action Notice Letter
- Verification of Driver's License and Proof of Automobile Insurance
- Summary of Your Rights Under The Fair Credit Reporting Act
- Sample Rejection Letter (Pre-Interview)
- Sample Rejection Letter (Post-Interview)
- Sample Offer Letter
- Conditional Job Offer (with Questionnaire for HR)
- Conditional Job Offer (send directly to Occupational Medical Clinic)
- Pre-Placement Medical Report
- Careers in Manufacturing
- Instrument Manufacturing Career Ladder
- Operations Career Ladder
- Advanced Manufacturing Career Ladder
- I-9 Form
- W-4 Form

GENERAL POLICIES, PROCEDURES AND CHECKLISTS

Orientation Checklist
Employee Orientation Acknowledgement
Sample Orientation Calendar
Employee Orientation Quiz
Getting to Know You
Personnel File Checklist
Employee Update Form
Personnel Update Emergency Contact
Status/Payroll Change Report
Payroll Deduction Authorization Form
Tuition Approval/Refund Request
Sample Overtime Authorization Policy for Non-Exempt Employees*
Overtime Authorization and Response Form
Make-Up Time Policy*
Make-Up Time Request
Attendance Policy *
Unpaid Leave of Absence Policy*
Request for Personal Leave
Sample Vacation Policy*
Sample Paid Time Off Policy*
Vacation/Paid Time Off Request Form
PTO Cash Out Request
Transfer, Promotion, or Demotion Request
Employee Transfer Request
Communications Checklist
Sample Voicemail/E-mail/Internet Policy*
Cell Phone Policy*
Personal Cell Phone Use
Sample Employee Privacy/Right to Inspect Statement*
Identity Theft Prevention Policy
Company Policy Managing Electronic Documents
Home Based Worker Checklist
Telecommuting Policy*
Telecommuting Request
Contingent Worker Checklist
Community Involvement Checklist
Check Request
Dress Code Policy*
Workplace Privacy Checklist
Video Surveillance Policy

CONTRACTS AND AGREEMENTS

Employee vs. Independent Contractor Analysis
Sample Independent Contractor Agreement Instructions
Sample Independent Contractor Agreement
Sample Confidentiality Agreement for Consultants, Independent Contractors and Other Outsourced Professionals
Sample Mediation and Arbitration of Employment Disputes Agreement
Employee Consent for Electronic Documents
Cell Phone Agreement *
Voluntary Activities Release & Waiver
Promissory Note
Telecommuting Agreement

PERFORMANCE MANAGEMENT

Employee Value Checklist
How To Be An Excellent Employee*
How To Be A Great Assistant
Manager's Monthly Checklist
Employee Monthly Checklist
Prohibited Activities (Standards of Conduct)*
Employee Arrest or Criminal Activity*
Why I Deserve A Raise
Request for Change in Compensation
A Dozen Reasons Why You're Not Getting That Promotion or Raise
Going The Extra Mile Reward Form
The 60 Day New Employee Survey
Employee Self-Study Bonus Report
Creativity Checklist
Employee Suggestion Form
Response to Employee Suggestion
Benchmarking Worksheet
Benchmark Considerations
Successful Time Management Checklist
Daily Time Sheet/Process Improvement
Sample Daily Time Sheet
Weekly Time Sheet
Sample Weekly Time Sheet
Prioritization Summary Form
Sample Time Sheet
Performance Agreement
Our Performance Plan
90 Day Game Plan
Things To Do /Daily Planner
Performance Improvement Form-Employee Self Evaluation
Performance Improvement Form-Manager Evaluation
Performance Improvement Dialogue Worksheet
Peer Improvement Form
Supervisor Improvement Form

MANAGING EMPLOYEE PROBLEMS

Problem Solving Sheet
Managing Poor Performance Checklist
Employee Turnover Cost Calculator
ABC Company Sample Turnover Calculation
Retention Program Possibilities
Conflict Resolution Checklist
Notice of Verbal Warning
Notice of Disciplinary Action
Disciplinary Leave Notice
Employee Correction Form
Performance Improvement Plan
Complaint Procedure

TERMINATION PROCESS

Pre-Layoff Checklist
Reductions in Force*
Resignation Form (Employee)
Pre-Termination Checklist
Termination Checklist
Termination Checklist (Employee)
Termination Notice
Termination Certification
Exit Interview Form
Post-Employment Release of Employment Information
Post-Employment Reference Policy*
Sample Customer Letter for Departed Employee
Sample General Release Agreement
Model General COBRA Notice (Full Version)
Model General COBRA Notice (Abbreviated Version)

PERSONNEL LAW COMPLIANCE

List of Compliance Obligations Addressed by HR That Works

Compliance Program FAQ

Risk Management Essentials

Personnel Record Retention Checklist

Employment Practices Checklist

Employment Practices Liability Insurance Worksheet

Mergers and Acquisition Audit

EEO Statement and Non-Harassment Policy *

EEO Data Form

EEO-1 Self-Identity Form

Acknowledgement of Information Regarding Sexual Harassment Policy

Acknowledgment and Waiver Regarding Employee Dating

Employee Compliance Survey

Checklist for Investigating Complaints of Harassment or Discrimination

Investigation Consent Form

Employee Complaint Form

Complaint Interview Form

Sample Witness Statement Form

Federal Compliance Chart

Federal vs. State FMLA Leave Laws

Requesting Leaves of Absence

FMLA Flowchart

FMLA Compliance Checklist

Family and Medical Leave Policy *

FMLA Attendance Tracker

FMLA Leave While on Workers' Compensation

WH-380-E Certification of Health Care Provider for Employee's Serious Health Condition

WH-380-F Certification of Health Care Provider for Family Member's Serious Health Condition

Definition of Serious Health Condition Under FMLA

WH-381 Notice of Eligibility and Rights & Responsibilities

WH-382 Designation Notice

FMLA - Release of Medical Information and HIPAA Authorization

FMLA - Warning for Failing to Provide Medical Certification

FMLA - Termination for Failing to Provide Medical Certification

FMLA - Request for Extension of FMLA

FMLA - Notice of Termination of Health Care Benefits for Failure to Pay Premiums

FMLA - Warning of Termination of Health Care Benefits for Failure to Pay Premiums

FMLA - Return to Work Notice

FMLA - Warning for Failure to Return to Work

FMLA - Termination No Contact

FMLA - Termination Failure to Return

Supporting Parents After Maternity/FMLA Leave

Request for Military Leave

Procedure for Disability Accommodation

ADA Flowchart

ADA Policy *

Disability Accommodation Request

Health Care Provider Letter Requesting Disability Certification (ADA)

Disability Certification Form

The ADA: Applying Performance and Conduct Standards

Religious Accommodation Flowchart

Religious Accommodation Request

Religious Accommodation Review

Religious Accommodation Response

CALIFORNIA POLICIES AND FORMS

California Compliance Chart For Employee Leaves
California Pregnancy Leave Integrated with FMLA and CFRA
CFRA/FMLA Flowchart
California Family Care and Medical Leave Policy (FMLA/CFRA 50 or more in CA)
CFRA/FMLA Eligibility Verification
CFRA/FMLA Designation Notice
CFRA/FMLA Certification of Health Care Provider for Employee's Serious Medical Condition
CFRA/FMLA Certification of Health Care Provider for Family Member's Serious Medical Condition
Pregnancy Disability Policy (5 to 49 in California)*
Pregnancy Disability Leave Request
California Military Leave Policy
California Paid Family Leave Policy *
California Unpaid Military Spouse Leave Policy
California Unpaid Military Leave Request
ADA vs. FEHA
Distinctions Between Federal and California Leave Laws
FMLA/CFRA Comparison Table
ADA, ADAAA, and FEHA Comparison Table
Leave for Drug and Alcohol Treatment Policy (CA 25 or More Employees)
Leave for Literacy Assistance Policy (CA 25 or more employees)
Leave for Domestic Violence Policy (CA 25 or less employees)
Leave for Domestic Violence and Sexual Assault Policy (CA 25 or more employees)
Leave for Emergency Duty Personnel Policy (CA less than 50 employees)
Leave for Emergency Duty Personnel Policy (CA more than 50 employees)

SAFETY AND SECURITY

21 Things to Do for a Safe Workplace
Sample General Safety Policy*
Policy Against Violence*
Use of Company Vehicles*
Authorization for Use of Personal Vehicle
Loss Prevention Policy and Program*
Declaration of No Injuries
Declaration of No Injuries Upon Termination
Return-to-Work Policy
Sample Letter to Physician for Return-to-Work Program
Physician Return-to-Work Release for Occupational Injury/Illness
Notification of Transitional Work Assignment
Sample Drug and Alcohol Policy*
Employee Acknowledgement of Drug Testing Policy
Drug Testing Consent Form
Drug Testing Consent Form - Long
Last Chance Agreement
Consent For The Release of Confidential Information
Disclosure of Confidential Information Letter
Work Comp Fraud Checklist

MISCELLANEOUS

Vision, Mission, Goals Worksheet
The Most Important Things We Do Every Day
Total Compensation Statement
Annual Training Log
Best Practices for Managing Confidential Client and Customer Information
Sample Business Associate Contract Provisions