

HR Forms & Tools

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List of Included Documents

Compensation, Benefits, Records & Time Off

Accidents

- Employee's Report of Accident
- Supervisor's Report of Accident

Catastrophic Leave

- Catastrophic Leave Donation
- Catastrophic Leave Request

Compensation and Benefits

- Annual Total Compensation Summary & Explanation
- Annual Total Compensation Summary (Short Version)
- Compensation and Benefits Profile
- Compensation Audit – Legal Issues
- Compensation Philosophy and Strategic Planning Worksheet
- Compensation Program Review Memo
- EEOC Guidance on Compensation Discrimination
- Employee Cellular Phone Acknowledgement
- Employee Total Compensation Summary
- How Important is Pay?
- Sample Total Compensation Letter

Domestic Partnership Benefits

- Declaration of Marriage or Domestic Partnership
- Domestic Partnership Declaration
- Notice of Termination of Eligibility for Domestic Partner Benefits

Fair Labor Standards Act (FLSA)

- 15 Things Managers Need to Know about the FLSA and Wage-Hour Law
- 20 Ways to Violate Federal Wage & Hour Laws and Pay the Price for Doing So
- Common Myths Regarding Paying Nonexempt Employees
- Emergency Closures & Paying Employees
- FLSA Challenge – Part I
- FLSA Challenge – Part II
- Frequently Asked FLSA Questions-Breaks and Time Off
- Frequently Asked FLSA Questions-Protecting & Maintaining Exempt Status
- Frequently Asked FLSA Questions-Fed and State Law Differences
- Frequently Asked FLSA Questions-Hours Worked
- Frequently Asked FLSA Questions-Overtime Calculations
- Frequently Asked FLSA Questions-Paying and Recording Time
- Frequently Asked FLSA Questions-Who's Exempt From Overtime
- Making Deductions From an Exempt Employee's Paycheck and Establishing a Safe Harbor
- Non-exempt Exempt Determination
- Non-exempt Exempt Determination Administrative Worksheet
- Non-exempt Exempt Determination Computer Related Worksheet
- Non-exempt Exempt Determination Executive Worksheet



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- Non-exempt Exempt Determination Highly Compensated Worksheet
- Non-exempt Exempt Determination Outside Sales Worksheet
- Non-exempt Exempt Determination Professional Worksheet
- Trying to Fit Technology and Computer Employees into FLSA Tests

Family Medical Leave Act (FMLA)

- WH-380-E Certification of Health Care Provider for Employee's Serious Health Condition (pdf file)
- WH-380-F Certification of Health Care Provider for Family Member's Serious Health Condition (pdf file)
- WH-381 Notice of Eligibility and Rights and Responsibilities (pdf file)
- WH-382 Designation Notice (pdf file)
- WH-384 Certification of Qualifying Exigency for Military Family Leave (pdf file)
- WH-385 Certification for Serious Injury or Illness of Covered Servicemember – for Military Family Leave (pdf file)
- FMLA Poster (pdf file)
- NDAA Amendments (pdf file)
- Letter to Employee FML Exhausted
- Five Common FMLA Mistakes

Job Description Worksheets

- ADA Related Information
- Job Description Worksheet - Exempt Status
- Job Description Sample - Exempt Position
- Job Description Sample - Non-exempt Position
- Job Description Worksheet - Non-exempt Status
- Job Description Worksheet - Short Version

Leave Records

- Weekly Leave Record (for Exempt Employees)
- Weekly Timesheet (for Nonexempt Employees)

Payroll and Personnel Records

- Alternate Scheduling Request
- Auditing Employee Information Policies and Practices
- Authorization to Release Information
- Company Credit Card Receipt Acknowledgement
- Direct Deposit Authorization
- Drafting a SSN Policy and Sample Policy
- Employee Achievement
- Employee Authorization to Release Information to Prospective Employers
- Employee Commendation
- Employee Data Change Form
- Employee Data Record
- Job Share Checklist and Application
- Job Sharing Memo of Understanding
- Payroll/Status Change



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- Policy Change Receipt and Acknowledgement
- Record Retention Requirements
- Request to View Personnel File
- The Care and Feeding of Personnel Records
- W-4 Form (pdf file)

Expense and Travel Reports

- Travel Advance Request
- Travel Advance Reconciliation
- Travel and Expense Report

Requests for Time Off and Employer Response

- Application for Sabbatical Leave
- Employee Request for Extension of Leave of Absence
- Employee Request for Leave of Absence (other than FMLA)
- Employee Request for School-Volunteer Leave
- Employer Response to Employee Request for Leave
- Vacation Request

Return to Work

- Acknowledgement of Offer of Temporary Light Duty Position
- Return to Work Release

Military Leave

- An Overview of Military Leave Requirements
- Military Leave Regulations
- USERRA Poster (pdf file)

Attendance Tracking

- Absence Report
- Attendance Tracker

Corrective Action & Termination

Corrective Action

- Better Late Than Never?
- Conducting a Workplace Investigation
- Conducting an Effective Corrective Action or Coaching Meeting
- Corrective Action Checklist
- Record of Oral Warning
- Responding to Harassment and Discrimination Complaints
- Supervisor Follow-Up Report on Previous Corrective Action

Employee Investigation Sample Letters

- Findings to Complainant Sample Letter
- Notes to File Regarding Follow Up Sample Letter



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- To Accused Employee After the Investigation Sample Letter
- To Accused Employee Before Investigation Sample Letter
- To Complainant Before Investigation Sample Letter
- To Witness Sample Letter

Notices

- Employee Probation Notice
- Employee Suspension Notice
- Employee Warning Notice

Termination

- Checklist for Conducting Termination Meeting – Part of a RIF
- Common Questions Regarding Termination
- Confirmation of Resignation
- Employee Termination Guide
- Employment at Will and Related Legal Nightmares
- Exit Interview Form
- Issues in Reductions in Force
- Job Abandonment Letter
- Layoffs and Reductions in Force (RIFs)
- Notice of Resignation
- Separation and General Release Agreement
- Separation & General Release Agreements – Should You Be Using Them?
- Termination Checklist
- Termination Letter
- Turnover Analysis
- Understanding Releases of Claims in Severance Agreements

EEO & Other Employment Law Issues & Practices

ADA

- ADA Accommodation Request from Employee
- ADA - Reasonable Accommodation Guide
- Determining who is Protected Under the ADA
- Epilepsy in the Workplace – Applying the ADA to Medical Disabilities
- How Does the ADA Apply to Vision Impairments?
- Managers Guide to the ADA
- Reasonable Accommodation and Undue Hardship
- Sample ADA Accommodation Approval Letter
- Sample Letter from Company to Employee Who is Requesting Work Accommodations or Restrictions Under the ADA
- Sample Letter from Employee to Doctor or Other Medical Professional Requesting Medical Records – Part of an ADA Reasonable Accommodation Review
- Sample Letter to Doctor or other Medical Professional Requesting Information Regarding Disability Status of Employee



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List of Included Documents

- The ADA and Persons with Intellectual Disabilities
- Two Increasingly Common ADA Issues: Telework as an Accommodation and Diabetes in the Workplace

Blogs and Social Networking

- Company Blogging Guidelines
- Drafting a Social Computing Networking Policy
- Personal Employee Blogs & Social Networking Sites

Confidentiality and Non-Compete Issues

- Employee's Acknowledgement to Protect Confidential Information and Competitive Position at Termination
- Safeguarding Company Information and our Competitive Edge Memo
- Sample Letter to New Employer of Person Covered by Confidentiality, Invention, or Non-compete Agreement
- Sample Non-compete and Confidentiality Agreement

EEO & Other Employment Law Issues

- Accommodating Religious Diversity: Headscarves in the Workplace
- Anti-Harassment and Non-Discriminatory Policy Acknowledgement
- Are You Protected Under the ADEA?
- Avoiding Caregiver Discrimination: What Managers Should Know
- Avoiding the Retaliation Nightmare
- Comparison of the Significant Elements of the ADA, FMLA, and Workers' Compensation
- EEO-1 Instructions (pdf file)
- EEO-1 Report Sample (pdf file)
- EEO-1 Reports-Do You Need to File One?
- EEO and Affirmative Action Statement of Policy
- EEOC Guidelines – Racial, Religious, and National Origin Discrimination
- Harassment Policy and Training Checklist
- Having a Company Party – Want to Avoid Getting Sued?
- Key Issues Surrounding Religion in the Workplace
- Off Duty Conduct
- Pregnancy and Maternity Issues in the Workplace
- Religious Accommodation Request
- Rest and Meal Breaks – What's Required?
- Retaliation Claims Are Growing
- RX: Prescriptions for Employment Law Training
- Summary of Federal Employment Law Requirements
- Tips from Kindergarten and How They Can Keep You Out of HR Legal Trouble
- Top 10 Lists Aren't Just for David Letterman
- Veterans with Service Connected Disabilities
- Vets-100 Report (pdf file)
- Vets-100A Report (pdf file)
- What Your Employees and Managers Need to Know About Your EEO Policies
- When Job Functions Clash With Religion



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Employment Practices

- Dress and Appearance Codes
- Employee Email Guidelines
- Employee Internet Use Guidelines
- HR Department Planning
- Human Resource Issues When Disaster Strikes
- Matching Gift Request Form
- Measuring Key Human Resource Functions
- Sample Human Resource Mission Statements
- What Do Union Rules Have to Do with a Non-Union Environment
- Whistleblowing-Reporting Serious Inappropriate Conduct
- Workplace Searches – Balancing Employee & Employer Interests

Pandemic Planning

- Identification of Key Functional Areas Affected by Pandemic
- Identification of Key Vendors/Suppliers in Preparation for a Pandemic
- Identification of Key Personnel in Preparation for a Pandemic
- Pandemic Flu & Workplace Privacy & Discrimination Issues
- Pandemic Flu Preparedness Checklist
- Pandemic Response Team
- Toolkit for Businesses and Employers – Seasonal Flu (pdf file)

Hiring

Fair Credit Reporting Act

- A Summary of Your Rights Under the Fair Credit Reporting Act
- Consumer Report Notification and Authorization
- Fair & Accurate Credit Transactions Act Information Disposal
- Fair Credit Reporting Act Tools & Notices
- Notice to Users of Consumer Reports –Obligations of Users Under the FCRA
- Using Consumer Reports: What Employers Need to Know

Hiring

- Affirmative Action - Hiring Selection Justification
- Affirmative Action Voluntary Survey
- Applicant List
- Application for Employment, Authorization to Release Information, and Affirmative Action Plan Voluntary Survey
- Application for Posted Position
- Becoming an Employee Friendly, Best Place to Work Employer
- Communication Systems Acknowledgment
- Confidentiality Agreement
- Employee Handbook Receipt and Acknowledgement
- Employee Referral Form
- Employment of Minors - Acknowledgement of Hours and Work
- Employment Tests and Selection Procedures: What's Legal?



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- Human Resource Audit - Hiring
- I-9 Form (pdf file)
- I-9 Form Spanish (pdf file)
- I-9's – New Electronic Options and Frequently Asked Questions
- Independent Contractor Agreement
- Independent Contractor Audit Guide
- Independent Contractors vs. Employees – Do You Know Who is Coming to Work?
- Job Requisition
- Position Criteria for Screening of Applicants
- Position Opening (Posting)
- Sample Acknowledgement of Application/Resume
- Sample Consulting Agreement
- Stay Interview Questions

Interviewing

- 50 Good Interview Questions and a Few Other Tips to Help Managers Make Rightful Hires
- Are Your Interview Questions Legal?
- Effective Interviewing
- Interview Evaluation

Orientation

- Human Resources Orientation Tracking Sheet
- Supervisor Orientation Checklist

Job Offers

- Job Offer Letter
- Job Rejection Letter
- Telephone Job Offer

References

- Driving Check Authorization
- Giving References and Avoiding the Legal Pitfalls
- Reference Check Summary
- Reference Checking – Do You Know Who You Are Hiring?
- Reference Checking Tips for Managers
- Telephone Reference Check
- Written Reference Request

Employee Development

Coaching

- Employee Performance Objective
- Providing Good Feedback and Documentation



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Employee Development

- Assessment of Organizational Opportunities
- Be Thankful for a Good Boss
- Employee Assessment
- Employee Development Action Plan
- Employee Motivation – How Are You Doing?
- Employee Self Assessment
- Employee Skills, Experience, & Training Inventory
- Feedback to Manager
- Potential Career Path (By Employee)
- Team Assessment
- Team Development Action Plan

Performance Appraisals

- Conducting an Effective Performance Appraisal Meeting
- General Performance Appraisal – Factor & Goal Evaluation
- General Performance Appraisal – Factor Evaluation
- Implementing 360 Degree Appraisal Systems
- Increasing Employee Success & Productivity through Goal Setting
- Is Everybody Really Above Average?
- Is Forced Ranking the Answer to Appraisal Problems?
- Manager/Supervisor Performance Assessment (360 Degree Appraisal)
- Manager's Coaching/Performance Appraisal Worksheet
- Setting Effective Goals: A Key To Employee Development
- Stressed Out Over Your Performance Review?
- Using Performance Management to Gain a Competitive Advantage

Succession Planning

- Employee Assessment
- Employee Development Action Plan
- Employee Potential Assessment
- Replacement Chart
- Succession Candidates (By Position)
- Summary of Current Executive Positions and Potential Changes

Surveys/Employee Input Tools

- Employee Attitude Surveys
- HR Services Satisfaction/Opinion Surveys
- Manager Self Assessment – Rate Your Skills as a Manager

Suggestion Program

- Employee Suggestion
- Suggestion Evaluation



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Training

- Creating an In-House Training Program
- Employee Training Record
- Employment Law Training – It's More Than Just a Good Idea
- External Training/Seminar/Course Request
- In House Employee Training/Seminar Request
- Measuring the Effect of Training
- Post Training Acknowledgement
- Training Evaluation
- Training Needs Assessment (Employee Evaluation)
- Training Needs Assessment (Manager Evaluation)
- Training Roster

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