



Employee Management Toolkit Summary





Compliance

Federal employment law can be quite confusing and overwhelming, so we've boiled it down to the essentials that you need to know to ensure your company is in compliance.

The **Compliance** chapter includes:

- **Employment Law Overview** - a summary of discriminatory practices and the aspects of employment that are covered by Federal employment law. An explanation of Employment At Will is included, with guidance on How To Ensure Compliance.
- **Federal Employment Law Summary** - an extensive list of the Federal employment laws that employers are subject to based on the number of employees.
- **Workplace Poster Requirements** - provides details on which posters you are required to display in your workplace.
- **Records Retention Requirements** - lists the documents and records that must be retained and the time period for retention.
- **Immigration Law Compliance Overview** - provides details on the process and requirements for verifying employee identity and work authorization.
- **Background Checks** - an explanation of how to comply with the Fair Credit Reporting Act when conducting background checks on potential employees.
- **Employee Classification** - details on how to correctly classify exempt vs. non-exempt employees to comply with the Fair Labor Standards Act (FLSA) as well as classifying employees vs. contractors to comply with IRS and Department of Labor regulations.

Selection



Employee turnover costs you money. As much as 100% of an employee's salary, including the cost of separation, hiring, lost productivity, lost revenue, and training time. Follow this guide to establish your own recruitment process, conduct thorough interviews, and comply with employment laws. Everything you need to ensure you hire right the first time.

The **Selection** chapter includes:

- **Interviewing Guidelines** with Do's and Don'ts for each phase of the interview process, tips for evaluating candidates, questioning techniques and guidance on conducting legal interviews.
- Over 100 **sample interview questions** about past jobs, education, experience and skills.
- A guide to **Working with Recruiters** with an explanation of contingency vs. retained search.
- **Five Ways to Reduce Your Recruiting Costs** with tips on low-cost and no-cost recruiting strategies.

Integration



New employees who get a positive first impression are more likely to be loyal, cooperative and interested in the success of your organization. And an effective new hire orientation process can increase retention and decrease your turnover costs. Get your new hires off to a good start with a thorough orientation and clear set of expectations. Clearly document employment terms with an offer letter and protect your business assets with a confidentiality agreement and promissory notes.

The **Integration** chapter includes:

- ***New Employee Orientation Outline*** for the first three months of employment.
- ***Personnel File Set-Up*** guide to establish legally correct files.
- ***Sample Offer Letter.***
- ***Sample Confidentiality Agreement.***
- ***Sample Promissory Notes*** for repayment of immigration fees, relocation benefits, and signing bonus in the event of resignation or termination for cause.



Management

Productivity, performance, results. Get the results you need for your business by effectively managing your employees' performance. And follow the guidelines for managing poor performance the right way to ensure you have the documentation to support disciplinary action, including termination of employment.

The **Management** chapter includes:

- ***Performance Management Guidelines*** on how to prepare for and conduct effective performance appraisal discussions, tips for delivering performance feedback, and guidelines for ongoing effective performance management.
- ***Ten Tips for Dealing with Employee Attitudes.***
- ***Goal setting and review using the SMART model.***
- ***Steps for Managing Poor Performance.***



Development

A blurred background image showing a person in a blue shirt sitting at a desk, working on a laptop. The person's face is not visible, and the image is out of focus, emphasizing the text in the foreground.

Developing your employees and providing a career path for them within the organization not only makes employees more likely to stay, but ensures you have the staff you need in place as vacancies arise. Effective succession planning, combined with training and development and the implementation of retention strategies, all help to ensure a return on your investment in your staff.

The **Development** chapter includes:

- *Guidance on how to establish a **Succession Planning** program with a sample succession planning form.*
- *Tips for **Developing Your Employees** with information on how to identify training needs.*
- *Guidelines for **Developing High Potential Employees**.*
- *Common-sense suggestions on ways you can keep your employees motivated and loyal to your organization with **33 Ways To Motivate Your Employees**.*
- ***Retention Strategies** with tips on actions you can take immediately to retain your employees, guidelines on handling employee resignations and a sample retention action plan.*
- ***Top 5 Signs Your Employees are Looking for a New Job**.*
- ***Top 5 Employee Retention Mistakes**.*



Separation

Protect yourself and your business. Dealing with poor performers and making the decision to terminate employment is never easy. Our guide will help you minimize your legal exposure.

The **Separation** chapter includes:

- **What You Are Legally Required to Pay at Termination** with information on severance pay, health benefits continuation, unemployment benefits, vested retirement benefits, and payment of unused vacation time.
- **Termination Meeting Guidelines** for preparing and conducting termination meetings, the format of the meeting, Do's and Don'ts, handling difficult situations and communicating with remaining employees.
- Guidance on how to respond to **Reference Checks** on former employees.

Additional Materials

The Instant HR Solutions® Employee Management Toolkit contains a wide array of materials that supplement the guidance and information provided. These materials may be used as is, or customized for your organization's specific needs.

Compliance

I-9 Audit Checklist

Form I-9 (English and Spanish versions)

Fair Credit Reporting Act summary

Federal Posters including:

Equal Employment Opportunity Is The Law

Employee Rights under the Fair Labor Standards Act

Employee Rights under the Family and Medical Leave Act

Employee Rights for Workers with Disabilities Paid at Special Minimum Wages

Job Safety and Health (OSHA)

Your Rights Under USERRA (Uniformed Services Employment and Reemployment Rights Act)

Union Members: Know Your Rights

Employee Rights Under the Davis-Bacon Act

Employee Rights on Government Contracts

Employee Polygraph Protection Act

Migrant and Seasonal Agricultural Worker Protection Act

Selection

Personnel Requisition Form

Employment Application

Candidate Evaluation Form

Reference Check Form

Integration

New Employee Orientation Checklists for Manager and "Buddy"

Employee Data Sheet

Equipment issuance Form

Direct Deposit Authorization

Federal W-4 Form for tax withholding

Form I-9 (English and Spanish versions)

Management

Performance Evaluation Form

Performance Evaluation Form for Managers & Supervisors

Management Evaluation Form

Employee Self-Evaluation Form

Progress Discussions Form

Annual Goal Setting Form

Annual Goal Review Form

Record of Corrective Action Form

Development

Training Needs Survey

Succession Planning Form

Retention Action Plan Form

Separation

Equipment Return Form

Exit Interview Form



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