Master HR Document Guide

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Prepared by: [Company Name]

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[Company Name] | [Document Title]
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Introduction

This **Master HR Document Guide** provides an overview of all official HR templates, policies, and checklists used within **[Company Name]**. Each document is categorized into a relevant HR pack, ensuring structured HR management and compliance with **South African labour laws**.

Each section includes:
- The **purpose** of the HR pack
- A **list of documents** included
- A **brief description** of each document

This guide ensures that **HR teams, managers, and employees** can easily locate and use the correct forms, policies, and templates as needed.

HR Packs Overview

1. Recruitment & Hiring Pack (9 Documents)

This pack supports the hiring process, ensuring that recruitment is structured, consistent, and legally compliant.

1. **Job Description Template** – Defines job responsibilities, requirements, and expectations.

2. **Job Advertisement Template** – A standard format for creating engaging job postings.

3. **Interview Question Bank** – Pre-approved behavioural and technical questions for fair assessments.

4. **Candidate Evaluation Scorecard** – A scoring sheet to objectively compare interviewees.

5. **Job Offer Letter Template** – A formal offer letter detailing employment terms.

6. **Reference Check Form** – A structured template for verifying a candidate's past employment.

7. **Rejection Letter Template** – Pre-drafted responses for unsuccessful candidates.

8. **New Hire Checklist** – Ensures all hiring and onboarding steps are completed.

9. **Employee Referral Policy** – Establishes guidelines for employees referring candidates for open positions, including referral bonus eligibility, payout structure, and submission process.

2. Onboarding & Employee Welcome Pack (7 Documents)

This pack ensures smooth onboarding, helping new employees transition into their roles effectively.

1. **Employee Welcome Email Template** – A formal welcome message with key first-day details.

2. **Employee Information Form** – Captures personal and tax details for HR records.

3. **Onboarding Checklist (HR & IT Setup)** – A checklist covering all onboarding tasks.

4. **New Employee Handbook Template** – A guide covering company policies, culture, and benefits.

5. **Confidentiality & Non-Disclosure Agreement (NDA)** – Protects company trade secrets and confidential data.

6. **Code of Conduct Policy** – Outlines workplace ethics, behaviour, and professional expectations.

7. **IT Access & Security Policy** – Defines company IT security guidelines and access rights.

3. Performance Management Pack (7 Documents)

This pack ensures structured employee performance evaluations and goal setting.

1. **Performance Review Template** – A structured form for performance evaluations.
2. **One-on-One Meeting Template** – A tool for managers to conduct structured check-ins.
3. **360-Degree Feedback Form** – A feedback tool gathering multiple perspectives.
4. **SMART Goals & OKRs Template** – A framework for setting measurable goals.

5. **Employee Self-Evaluation Form** – Encourages employees to reflect on their performance.
6. **Performance Improvement Plan (PIP) Template** – A plan to help underperforming employees improve.
7. **Employee Recognition & Reward Policy** – Defines how the company recognizes and rewards top performers.

4. Workplace Policies & Compliance Pack (12 Documents)

This pack contains policies that ensure compliance with South African labour laws.

1. **Workplace Health & Safety Policy** – Defines company safety protocols and compliance.

2. **Remote Work Policy** – Guidelines for employees working remotely.

3. **Leave Policy** – Details employee leave entitlements under the BCEA.

4. **Employee Disciplinary Policy** – Outlines disciplinary procedures and processes.

5. **Anti-Discrimination & Harassment Policy** – Ensures a respectful, inclusive workplace.

6. **Grievance Policy & Procedure** – A structured approach for employees to raise complaints.

7. **Disciplinary Notice Template** – A formal notice for issuing disciplinary warnings.

8. **Employee Warning Letter Template** – A letter format for addressing misconduct.

9. **Conflict Resolution Policy** – Defines steps for resolving workplace disputes fairly.

10. **Employee Satisfaction Survey** – A confidential survey to assess workplace satisfaction.

11. **Conflict of Interest Policy** – Establishes guidelines for identifying and handling conflicts of interest.

12. **Anti-Bribery & Corruption Policy** – Prevents unethical business practices, bribery, and corruption.

5. Compensation & Benefits Pack (5 Documents)

This pack ensures fair and compliant payroll and benefits management.

1. **Salary Structure Guide** – Defines company pay scales and salary progression.
2. **Bonus & Incentive Plan** – Outlines performance-based bonus structures.
3. **Payroll Processing Checklist** – A step-by-step guide for HR payroll teams.
4. **Expense Reimbursement Policy** – Defines reimbursement procedures for work-related expenses.
5. **Leave Request Form** – A standardized form for employees to request leave.

6. Employee Development & Training Pack (6 Documents)

This pack supports employee career growth and learning initiatives.

1. **Career Development Plan** – A roadmap for employees' long-term career goals.
2. **Employee Training Needs Assessment Form** – A tool to identify skills gaps.
3. **Training Feedback Form** – Collects employee feedback after training programs.
4. **Employee Development Plan** – A structured document for continuous development.
5. **Career Growth Roadmap** – A long-term strategy for career advancement.
6. **Mentorship Program Guidelines** – Defines the structure and expectations for mentorship programs.

7. Legal Compliance & HR Policy Pack (6 Documents)

This pack contains critical legal agreements and HR compliance documents.

1. **Employment Agreement Template** – A contract defining employment terms.
2. **Non-Compete Agreement** – Restricts employees from working with competitors' post-employment.
3. **HR Compliance Audit Checklist** – Ensures the company follows HR legal requirements.
4. **Data Protection & Privacy Policy (POPIA Compliance)** – Ensures compliance with South African data protection laws.

5. **Workplace Health & Safety Policy** – Defines workplace safety protocols as per **OHSA**.
6. **Corporate Governance Policy** – Defines the company's governance framework, leadership responsibilities, ethical standards, and compliance with South African corporate governance laws, including the **King IV Report** and **Companies Act 71 of 2008**.

8. Termination & Offboarding Pack (5 Documents)

This pack ensures proper exit procedures for departing employees.

1. **Resignation Acceptance Letter** – A formal letter acknowledging an employee's resignation.
2. **Exit Interview Form** – A structured form to gather feedback from departing employees.
3. **Final Paycheck & Benefits Processing Checklist** – Ensures all salary and benefits are settled.
4. **Return of Company Property Form** – Tracks the return of company assets like laptops and ID cards.
5. **Termination Letter Template** – A formal document notifying an employee of their contract termination.

Grand Total: 57 Documents!

This guide ensures HR teams, managers, and employees can easily locate and utilize all necessary HR documents.