

Employee Staff File Checklist

- Any documents with original signatures are to be saved in the Employee file
- Each document should be scanned and stored in the Employees' electronic file
- Copies of the documents should be made available to the Employee for their own records

Employee Name: _____ Contract Date: _____

Position: _____ Commencement Date: _____

Induction Program & Performance Review Schedule Dates:

- | | |
|---|--|
| <input type="checkbox"/> Day 1 - Full Day (7-8 hours) _____/_____/_____ | <input type="checkbox"/> Day 90 - (1-2 hours) _____/_____/_____ |
| <input type="checkbox"/> Day 7 - (1 hour) _____/_____/_____ | <input type="checkbox"/> 6 Months - (2-3 hours) _____/_____/_____ |
| <input type="checkbox"/> Day 14 - (1 hour) _____/_____/_____ | <input type="checkbox"/> 12 Months - (2-3 hours) _____/_____/_____ |
| <input type="checkbox"/> Day 30 - (1-2 hours) _____/_____/_____ | <input type="checkbox"/> 18 Months - (2-3 hours) _____/_____/_____ |
| <input type="checkbox"/> Day 60 - (1-2 hours) _____/_____/_____ | |

Marketing:

	Yes	No	Manager Initials	Date
• Business Cards	<input type="checkbox"/>	<input type="checkbox"/>	_____	_____/_____/_____
• Corporate Photo	<input type="checkbox"/>	<input type="checkbox"/>	_____	_____/_____/_____
• Internet Profile	<input type="checkbox"/>	<input type="checkbox"/>	_____	_____/_____/_____
• LinkedIn	<input type="checkbox"/>	<input type="checkbox"/>	_____	_____/_____/_____
• Company Facebook	<input type="checkbox"/>	<input type="checkbox"/>	_____	_____/_____/_____

Security:

	Yes	No	Manager Initials	Date
• Office Key Number	<input type="checkbox"/>	<input type="checkbox"/>	_____	_____/_____/_____
• Alarm Code	<input type="checkbox"/>	<input type="checkbox"/>	_____	_____/_____/_____
• Car Parking Access	<input type="checkbox"/>	<input type="checkbox"/>	_____	_____/_____/_____

Workstation / Computer Subscriptions:

	Yes	No	Manager Initials	Date
• Computer Profile Setup	<input type="checkbox"/>	<input type="checkbox"/>	_____	_____/_____/_____
Username: _____				
Password: _____				
• Company Email Account Setup (provided by IT Company)	<input type="checkbox"/>	<input type="checkbox"/>	_____	_____/_____/_____
Username: _____				
Password: _____				
• Gmail Account Setup (provided by IT Company)	<input type="checkbox"/>	<input type="checkbox"/>	_____	_____/_____/_____
Username: _____				
Password: _____				

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Workstation / Computer Subscriptions: (Cont.)	Yes	No	Manager Initials	Date
<ul style="list-style-type: none"> Property Management Trust Software Profile Setup Username: _____ Password: _____	<input type="checkbox"/>	<input type="checkbox"/>	_____	___/___/___
<ul style="list-style-type: none"> Sales Trust Software Profile Setup Username: _____ Password: _____	<input type="checkbox"/>	<input type="checkbox"/>	_____	___/___/___
<ul style="list-style-type: none"> CRM / Customer Database Profile Setup Username: _____ Password: _____	<input type="checkbox"/>	<input type="checkbox"/>	_____	___/___/___
<ul style="list-style-type: none"> Inspection Express Profile Setup Username: _____ Password: _____	<input type="checkbox"/>	<input type="checkbox"/>	_____	___/___/___
<ul style="list-style-type: none"> Inspect Real Estate Profile Setup Username: _____ Password: _____	<input type="checkbox"/>	<input type="checkbox"/>	_____	___/___/___
<ul style="list-style-type: none"> Authority / Rental Agreement / Templates Profile Setup Username: _____ Password: _____	<input type="checkbox"/>	<input type="checkbox"/>	_____	___/___/___

Employment Documents:	Yes	No	Manager Initials	Date
• Employee Application	<input type="checkbox"/>	<input type="checkbox"/>	_____	___/___/___
• Copy of Position Advertisement	<input type="checkbox"/>	<input type="checkbox"/>	_____	___/___/___
• Interview Questionnaire	<input type="checkbox"/>	<input type="checkbox"/>	_____	___/___/___
• Reference Check Questionnaire	<input type="checkbox"/>	<input type="checkbox"/>	_____	___/___/___
• Letter of Offer	<input type="checkbox"/>	<input type="checkbox"/>	_____	___/___/___
• Employment Contract (including Schedule 1, Schedule 2 and KPI's)	<input type="checkbox"/>	<input type="checkbox"/>	_____	___/___/___
• Payroll Information Form	<input type="checkbox"/>	<input type="checkbox"/>	_____	___/___/___
• Staff Emergency Contact Details	<input type="checkbox"/>	<input type="checkbox"/>	_____	___/___/___
• Valid Victorian Drivers License	<input type="checkbox"/>	<input type="checkbox"/>	_____	___/___/___
• ATO Tax File Number Declaration	<input type="checkbox"/>	<input type="checkbox"/>	_____	___/___/___
• Choice of Superannuation Fund Form	<input type="checkbox"/>	<input type="checkbox"/>	_____	___/___/___
• Copy of Fair Work Information Sheet	<input type="checkbox"/>	<input type="checkbox"/>	_____	___/___/___
• BLA - Authority to perform duties of an Estate Agent (if applicable)	<input type="checkbox"/>	<input type="checkbox"/>	_____	___/___/___

Employee Staff File Checklist

The Employee must provide documents, to be copied and kept on file:

	Yes	No	Manager Initials	Date
• Declaration of Eligibility / Agent's Rep	<input type="checkbox"/>	<input type="checkbox"/>	_____	___/___/___
• Valid Police Check	<input type="checkbox"/>	<input type="checkbox"/>	_____	___/___/___
• Valid Agent's Representative Certificate	<input type="checkbox"/>	<input type="checkbox"/>	_____	___/___/___
• Valid Real Estate License	<input type="checkbox"/>	<input type="checkbox"/>	_____	___/___/___
• Valid Victorian Driver's License	<input type="checkbox"/>	<input type="checkbox"/>	_____	___/___/___
• Copy of REIV Membership / Industry Assoc. Membership	<input type="checkbox"/>	<input type="checkbox"/>	_____	___/___/___

If applicable, register Employee Online with the BLA:

	Yes	No	Manager Initials	Date
• "Notice of Employment doc" - forward to BLA or Register Online	<input type="checkbox"/>	<input type="checkbox"/>	_____	___/___/___

Employment Policies:

	Yes	No	Manager Initials	Date
• Addendum #1 – Code of Conduct	<input type="checkbox"/>	<input type="checkbox"/>	_____	___/___/___
• Mobile Telephone and iPad Use Policy (if applicable)	<input type="checkbox"/>	<input type="checkbox"/>	_____	___/___/___
• Motor Vehicle Policy (if applicable)	<input type="checkbox"/>	<input type="checkbox"/>	_____	___/___/___
• Employee Policies Acknowledgement and Declaration	<input type="checkbox"/>	<input type="checkbox"/>	_____	___/___/___

Termination of Employment:

	Yes	No	Manager Initials	Date
• Resignation Notice / Termination Letter	<input type="checkbox"/>	<input type="checkbox"/>	_____	___/___/___
• Exit Interview / Post-Employment Responsibilities Letter	<input type="checkbox"/>	<input type="checkbox"/>	_____	___/___/___
• BLA Removal Notification	<input type="checkbox"/>	<input type="checkbox"/>	_____	___/___/___

<p>90 Day Action Plan #1 Manager Initials: _____ Date: ___/___/___</p> <p>Project:</p> <p>1./</p> <p>2./</p> <p>3./</p> <p>4./</p> <p>5./</p> <div style="border: 1px solid black; padding: 5px; margin-top: 10px;"> <p style="text-align: center;">Notes & Feedback</p> </div>	<p>90 Day Action Plan #2 Manager Initials: _____ Date: ___/___/___</p> <p>Project:</p> <p>1./</p> <p>2./</p> <p>3./</p> <p>4./</p> <p>5./</p> <div style="border: 1px solid black; padding: 5px; margin-top: 10px;"> <p style="text-align: center;">Notes & Feedback</p> </div>
<p>90 Day Action Plan #3 Manager Initials: _____ Date: ___/___/___</p> <p>Project:</p> <p>1./</p> <p>2./</p> <p>3./</p> <p>4./</p> <p>5./</p> <div style="border: 1px solid black; padding: 5px; margin-top: 10px;"> <p style="text-align: center;">Notes & Feedback</p> </div>	<p>90 Day Action Plan #4 Manager Initials: _____ Date: ___/___/___</p> <p>Project:</p> <p>1./</p> <p>2./</p> <p>3./</p> <p>4./</p> <p>5./</p> <div style="border: 1px solid black; padding: 5px; margin-top: 10px;"> <p style="text-align: center;">Notes & Feedback</p> </div>
<p>90 Day Action Plan #5 Manager Initials: _____ Date: ___/___/___</p> <p>Project:</p> <p>1./</p> <p>2./</p> <p>3./</p> <p>4./</p> <p>5./</p> <div style="border: 1px solid black; padding: 5px; margin-top: 10px;"> <p style="text-align: center;">Notes & Feedback</p> </div>	<p>90 Day Action Plan #6 Manager Initials: _____ Date: ___/___/___</p> <p>Project:</p> <p>1./</p> <p>2./</p> <p>3./</p> <p>4./</p> <p>5./</p> <div style="border: 1px solid black; padding: 5px; margin-top: 10px;"> <p style="text-align: center;">Notes & Feedback</p> </div>
<p>90 Day Action Plan #7 Manager Initials: _____ Date: ___/___/___</p> <p>Project:</p> <p>1./</p> <p>2./</p> <p>3./</p> <p>4./</p> <p>5./</p> <div style="border: 1px solid black; padding: 5px; margin-top: 10px;"> <p style="text-align: center;">Notes & Feedback</p> </div>	<p>90 Day Action Plan #8 Manager Initials: _____ Date: ___/___/___</p> <p>Project:</p> <p>1./</p> <p>2./</p> <p>3./</p> <p>4./</p> <p>5./</p> <div style="border: 1px solid black; padding: 5px; margin-top: 10px;"> <p style="text-align: center;">Notes & Feedback</p> </div>
<p>90 Day Action Plan #9 Manager Initials: _____ Date: ___/___/___</p> <p>Project:</p> <p>1./</p> <p>2./</p> <p>3./</p> <p>4./</p> <p>5./</p> <div style="border: 1px solid black; padding: 5px; margin-top: 10px;"> <p style="text-align: center;">Notes & Feedback</p> </div>	<p>90 Day Action Plan #10 Manager Initials: _____ Date: ___/___/___</p> <p>Project:</p> <p>1./</p> <p>2./</p> <p>3./</p> <p>4./</p> <p>5./</p> <div style="border: 1px solid black; padding: 5px; margin-top: 10px;"> <p style="text-align: center;">Notes & Feedback</p> </div>

<p>Pre-Commencement Booklet sent: Manager Initials: ____ Date: ____/____/____</p> <p>Meeting Feedback and Actions:</p> <p>.....</p> <p>.....</p> <p>.....</p> <p>.....</p> <p>.....</p>	<p>Day 1 - New Employee Induction: Full Day (7-8 hours) Manager Initials: ____ Date: ____/____/____</p> <p>Meeting Feedback and Actions:</p> <p>.....</p> <p>.....</p> <p>.....</p> <p>.....</p> <p>.....</p>
<p>Day 7 - Mentoring Check-in: (1 hour) Manager Initials: ____ Date: ____/____/____</p> <p>Meeting Feedback and Actions:</p> <p>.....</p> <p>.....</p> <p>.....</p> <p>.....</p> <p>.....</p>	<p>Day 14 - Mentoring Check-in: (1 hour) Manager Initials: ____ Date: ____/____/____</p> <p>Meeting Feedback and Actions:</p> <p>.....</p> <p>.....</p> <p>.....</p> <p>.....</p> <p>.....</p>
<p>Day 30 - Initial Performance Review: (1-2 hours) Manager Initials: ____ Date: ____/____/____</p> <p>Meeting Feedback and Actions:</p> <p>.....</p> <p>.....</p> <p>.....</p> <p>.....</p> <p>.....</p>	<p>Day 60 - Initial Performance Review: (1-2 hours) Manager Initials: ____ Date: ____/____/____</p> <p>Meeting Feedback and Actions:</p> <p>.....</p> <p>.....</p> <p>.....</p> <p>.....</p> <p>.....</p>
<p>Day 90 - End of Probation Review: (1-2 hours) Manager Initials: ____ Date: ____/____/____</p> <p>Meeting Feedback and Actions:</p> <p>.....</p> <p>.....</p> <p>.....</p> <p>.....</p> <p>.....</p>	<p>6 Months - Full Performance Review: (2-3 hours) Manager Initials: ____ Date: ____/____/____</p> <p>Meeting Feedback and Actions:</p> <p>.....</p> <p>.....</p> <p>.....</p> <p>.....</p> <p>.....</p>
<p>12 Months - Full Performance Review: (2-3 hours) Manager Initials: ____ Date: ____/____/____</p> <p>Meeting Feedback and Actions:</p> <p>.....</p> <p>.....</p> <p>.....</p> <p>.....</p> <p>.....</p>	<p>18 Months - Full Performance Review: (2-3 hours) Manager Initials: ____ Date: ____/____/____</p> <p>Meeting Feedback and Actions:</p> <p>.....</p> <p>.....</p> <p>.....</p> <p>.....</p> <p>.....</p>