

# Using Your Employer Documentation Kit

This is the procedure for using the Employer Documentation Kit, which contains essential checklists, forms and letters required to comply with the fundamentals of the Employment Relations Act 2000 and the Holidays Act 2003.

## Getting Organised

| Step | Action   | Tool                        |
|------|--|-----------------------------|
| 1.   | Familiarise yourself with the contents of the Employer Documentation Kit.  | Library of Documents        |
| 2.   | Save the bound copy of the Kit as a master for photocopying (if you prefer to work from hard copies rather than electronic).   | Booklet                     |
| 3.   | Save a copy of the disk contents (Microsoft Word and Excel electronic files) where you keep your templates / master documents on your computer system. Files are set up to be 'read only' so you can't accidentally overwrite them.                    | Disk                        |
| 4.   | Store the disk somewhere safe as a backup.   | Disk                        |
| 5.   | Set up a hard copy folder for each employee to store copies of forms, letters, and checklists as they are created.   | Employee Personal File Tabs |
| 6.   | If you're going to work electronically, also set up a folder for each employee to store electronic copies of relevant documents.<br><br>You can use the tab names in the Employee Personal File Tabs as a guide to name the folders for each employee. | Employee Personal File Tabs |

## Using the Electronic Files

| Step | Action  | Tool                          |
|------|---|-------------------------------|
| 1.   | If you find you're unable to open an electronic file, it's likely to be because you are using an earlier version of Microsoft Office than 2007.<br><br>If so, download a Microsoft compatibility pack available from <a href="http://www.microsoft.com">www.microsoft.com</a> (click on the web link to be taken directly to the pack). | <a href="#">Web link</a>      |
| 2.   | To use a document, open it and click 'save as' then name the document appropriately (original files are read-only to prevent overwriting).  | Disk contents you have stored |
| 3.   | Make changes to customise the document to suit your firm and employee.<br><br>Note that most of the letters contain fields that look like [this]. If you double-click on the field, you can change the text to personalise the letter. (The square brackets and shaded fields will not show in your printed document.)                  |                               |
| 4.   | Print and save hard copies of documents in the employee's personal file.  |                               |
| 5.   | Save any electronic copies of documents in a folder set up for the employee.  |                               |
| 6.   | Ensure your computer is backed up regularly and copies of files stored off site for safekeeping.<br><br>This is important for risk and disaster management (e.g. if there is a flood, earthquake or theft on your premises).  |                               |