

ConnectsUs Templates

Topic (Kit)	Template	File Type	Template Description
	Click on blue text to preview		
Employee Handbook / Manual	Basic Employee Handbook - ONTARIO		
Employee Handbook / Manual	Basic Employee Handbook - ALBERTA	W	Create the basics with up to 50 essential policies / topics
Employee Handbook / Manual	Basic Employee Handbook - BC		
Employee Handbook / Manual	Orientation Manual - ONTARIO		
Employee Handbook / Manual	Orientation Manual - ALBERTA	W	Create a complete employee manual or orientation document with a menu of 150 policies / topics
Employee Handbook / Manual	Orientation Manual - BC		
Employee Handbook / Manual	Employee Handbook Project Spreadsheet		A time-saving tool we've created to help you manage your Handbook/Manual project. It provides an easy, flexible way to view, sort and manage the topics in your Employee Manual template. Each topic links directly to the help page in the resource center that corresponds with the specific topic/policy.

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Employee Handbook / Manual	Employee Handbook Acknowledgement Form	W	An important binding addendum to employment or independent contractor agreements whereby Staff (employees and contractors) in the presence of a witness, sign to acknowledge that they've read, understood, and will adhere to the conduct policies outlined in the Staff Policies section (ONLY) in your Employee Handbook or HR Manual.
Employee Handbook / Manual	INSTRUCTIONS. Employee Handbook Acknowledgement Form	W	The step-by-step Instructions Document shows HR staff how to execute the Agreement for 4 different scenarios.
Contracts & Agreements	Offer Form	W	Form that ensures that all information about a candidate and position is collected and summarized, so that HR has the information they need to process an employment offer and agreement.
Contracts & Agreements	Employment Agreement	W	A formal agreement that specifies the terms and conditions of the relationship between an employee and your company.
Contracts & Agreements	INSTRUCTIONS. Employment Agreement	W	Instructions for HR staff that accompany the Employment Agreement
Contracts & Agreements	Independent Contractor Agreement	W	A formal agreement that specifies the terms and conditions of the relationship between a contractor or consultant who is not an employee, and your company.
Contracts & Agreements	INSTRUCTIONS. Independent Contractor Agreement	W	Instructions for HR staff that accompany the Independent Contractor Agreement
Contracts & Agreements	Staff Policies Manual	W	Includes the main conduct policies you need to supplement your employment agreement and protect your company. The conduct policies are 'extracted' from the Employee Handbook to create a new manual that is signed off by an employee or an independent contractor when an offer is made.
Contracts & Agreements	Terms & Definitions Addendum	W	Rather than repeating the terms and definitions whenever capitalized formal terms are used throughout your Staff Policies Manual, it's recommend that they are listed alphabetically and defined in a separate document.

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Contracts & Agreements	Overtime Averaging Agreement	W	Where the Company is legally required to pay overtime rates for extra hours worked by employees per day or per week, this contract is signed by an employee that allows the Company to bypass overtime rates by entering into an Averaging Agreement with the employee to average their hours of work over a period of 1, 2, 3 or 4 weeks, without paying overtime rates.
Contracts & Agreements	INSTRUCTIONS. Overtime Averaging Agreement	W	Instructions for HR Staff that accompany the Averaging Agreement
Contracts & Agreements	Front Desk Service Agreement	W	Used by businesses that care about customer service. Contractual Agreement that includes a guide and protocols to be followed by staff who provide front line & reception services. Used to educate staff on the protocol & service levels required for performing front line & reception duties, and to obtain signed confirmation of their understanding and abiding of the Agreement.
Contracts & Agreements	INSTRUCTIONS. Front Desk Service Agreement	W	Instructions for HR Staff that accompany the Front Desk Service Agreement
Contracts & Agreements	Termination Calculation & Authorization Form	E	Form that calculates termination payments required and provides authorization to terminate an employee.
Contracts & Agreements	INSTRUCTIONS. Termination Calculation & Authorization Form	W	Instructions for HR staff that accompany the Termination Authorization Form
Contracts & Agreements	Termination letter and Release	W	The termination letter communicates and outlines the details relating to an involuntary termination. A release is a legal agreement that protects your company from the risk of future legal action
Contracts & Agreements	INSTRUCTIONS. Termination letter and Release	W	Instructions for HR staff that accompany the Termination Letter & Release
Contracts & Agreements	Non-Disclosure Agreement for Exploratory Discussions	W	Agreement to be used to protect the interests of your company in situations where company-confidential information may be shared during exploratory discussions with prospective candidates.
Contracts & Agreements	INSTRUCTIONS. Non-disclosure Agreement for Exploratory Discussions	W	Instructions for Managers & HR that accompany the Non-Disclosure Agreement for Exploratory Discussions

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Contracts & Agreements	Reference Check Request & Consent Script	W	An email script used to obtain reference provider names and written consent from candidates to conduct reference checks.
Contracts & Agreements	Training Reimbursement Agreement	W	Contractual agreement between your company and an employee embarking on a training initiative that exceeds a company-determined cost ceiling.
Contracts & Agreements	INSTRUCTIONS. Training Reimbursement Agreement	W	Instructions for HR Staff that accompany the Training Reimbursement Agreement
Contracts & Agreements	Delegate Confidentiality Agreement Script	W	Document that contains instructions and a script for a conduct agreement between a manager and administrative-level staff.
Open & Advertise a Position	Process Guide for Managers - Opening & Advertising a Position	W	Step-by-step process for stage 1 of recruiting & hiring process – opening & advertising a position. Tells staff who's responsible for each step, and provides point-and-click access to other ConnectsUs documents used in the process.
Open & Advertise a Position	Approval to Hire Form	W	Form that summarizes the details of a budgeted or replacement position that requires final approval before the search begins.
Open & Advertise a Position	INSTRUCTIONS. Approval to Hire Form	W	Instructions for Managers that accompany the Approval to Hire Form.
Open & Advertise a Position	Position Justification Form	W	Form used to summarize the business case that justifies additional staff, opening a new position and incurring unbudgeted expenses.
Open & Advertise a Position	INSTRUCTIONS. Position Justification Form	W	Instructions for Managers that accompany the Position Justification Form
Open & Advertise a Position	Position Information Checklist	W	Checklist for defining status of an open position and ensure hiring alternatives and costs have been explored before it's opened

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Open & Advertise a Position	INSTRUCTIONS. Position Information Checklist <small>Click on blue text to preview</small>	W	Instructions for Managers that accompany the Position Information Checklist
Open & Advertise a Position	Job Posting - Standard	W	Template is used when you need to create a job posting for a position below director level.
Open & Advertise a Position	INSTRUCTIONS. Job Posting - Standard	W	Instructions for Managers & HR that accompany the Job Posting - Standard
Open & Advertise a Position	Job Posting - Senior Position	W	Template is used when you need to create a job posting for a senior-level position.
Open & Advertise a Position	INSTRUCTIONS. Job Posting - Senior Position	W	Instructions for Managers & HR that accompany the Job Posting - Senior Position
Open & Advertise a Position	Job Posting - Creative	W	Template is used when you need to create a unique or creative job ad that stands out from the rest.
Open & Advertise a Position	INSTRUCTIONS. Job Posting - Creative	W	Instructions for Managers & HR that accompany the Job Posting - Creative
Open & Advertise a Position	Job Openings Spreadsheet	E	Spreadsheet that will help your company organize and track open positions.
Open & Advertise a Position	INSTRUCTIONS. Job Openings Spreadsheet	W	Instructions for HR Staff that accompany the Job Openings Spreadsheet
Open & Advertise a Position	Head Hunters & Recruiting Agencies Guide	W	Reference guide for HR on how to decide when to use external vs. internal recruiting resources to fill a position

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Tracking Applicants	Process Guide for Managers - Tracking Applicants	W	Step-by-step process for stage 2 of recruiting & hiring process – tracking applicants. Tells staff who's responsible for each step, provides point-&-click access to other documents used in the process.
Tracking Applicants	HR Master Applicant Spreadsheet	E	Spreadsheet template for HR that will help your company track all applicants who apply for positions in your company or prospects that you've identified as top talent.
Tracking Applicants	INSTRUCTIONS. HR Master Applicant Spreadsheet	W	Instructions for HR Staff that accompany the HR Master Applicant Spreadsheet
Tracking Applicants	Reviewing Applications Guide	W	Guidelines and recommended procedures for reviewing, shortlisting, or disqualifying job applicants in a consistent manner
Tracking Applicants	Position Applicant Tracking Spreadsheet	E	Spreadsheet template to help managers track, rate and shortlist candidates who have applied for an open position
Tracking Applicants	INSTRUCTIONS. Position Applicant Tracking Spreadsheet	W	Instructions for HR Staff that accompany the Position Applicant Tracking Spreadsheet
Tracking Applicants	Sourcing Prospects Guide	W	Guide for all staff on how to approach and cultivate professional relationships with future employee prospects
Interviewing	Process Guide for Managers- Interviewing	W	Step-by-step process for stage 3 of the recruiting and hiring process – interviewing. It tells staff who's responsible for each step, and provides point-and-click access to other ConnectsUs documents used in the process.
Interviewing	Interviewing Guide	W	Guide to interviewing guidelines and procedures, legislated requirements, and information on how to prepare for and conduct various types of interviews
Interviewing	Interview Schedule Form	W	Form template for creating schedule of interviews and list of participants

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Interviewing	Non-Disclosure Agreement for Exploratory Discussions	W	Agreement to be used to protect the interests of your company in situations where company-confidential information may be shared during exploratory discussions with prospective candidates.
Interviewing	INSTRUCTIONS. Non-disclosure Agreement for Exploratory Discussions	W	Instructions for Managers & HR that accompany the Non-Disclosure Agreement for Exploratory Discussions
Interviewing	Delegate Confidentiality Agreement Script	W	Document that contains instructions and a script for a conduct agreement between a manager and administrative-level staff.
Interviewing	Phone Interview Questionnaire	W	Questionnaire template for conducting telephone screen interviews
Interviewing	INSTRUCTIONS. Phone Interview Questionnaire	W	Instructions for Managers that accompany the Phone Interview Questionnaire
Interviewing	Interview Questions	W	Comprehensive list of over 225 categorized example interview questions
Interviewing	Q&A Style Panel Interview Questionnaire	W	Template for conducting in-person, question and answer (Q & A)-style interviews
Interviewing	INSTRUCTIONS. Q&A Style Panel Interview Questionnaire	W	Instructions for Managers that accompany the Q&A Style Panel Interview Questionnaire
Interviewing	Presentation Style Panel Interview Questionnaire	W	Template for conducting in-person, presentation-style interviews
Interviewing	INSTRUCTIONS. Presentation Style Panel Interview Questionnaire	W	Instructions for Managers that accompany the Presentation Style Panel Interview Questionnaire
Interviewing	Brochure for Interviewed Candidates	W	Marketing-style brochure, typically distributed to final-stage interview candidates, that summarizes the benefits of working at your company

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Interviewing	External Candidate Regrets Scripts	W	Scripts for sending regrets to candidates to help you communicate to external applicants that they will not be proceeding further in the interview process.
Interviewing	Internal Candidate Regrets Scripts	W	Scripts for communicating to internal applicants that they will not be proceeding further in the interview process
Checking References & Hiring	Process Guide for Managers - Checking References & Hiring	W	Step-by-step process for stage 4 of the recruiting and hiring process – reference checking and hiring. It tells staff who's responsible for each step, and provides point-and-click access to other documents used in the process.
Checking References & Hiring	Reference Checking Guide	W	Guide to checking references to verify information about a candidate with a third party
Checking References & Hiring	Reference Check Request & Consent Script	W	Template for an email script used to obtain reference provider names and written consent from candidates to conduct reference checks.
Checking References & Hiring	Reference Check Questions	W	Comprehensive list of sample questions for use in conducting reference checks
Checking References & Hiring	Reference Check Form	W	Form template and script for checking references on prospective candidates
Checking References & Hiring	INSTRUCTIONS. Reference Check Form	W	Instructions for Managers & HR that accompany the Reference Check Form
Checking References & Hiring	Recruiting & Hiring Overview Guide	W	Overview of company's recruiting and hiring process

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Performance - Probationary Periods	Process Guide for Managers - Probationary Period	W	Step-by-step process for managers of the probationary period process, and explains who's responsible for each step.
Performance - Probationary Periods	Probationary Period Review Form	W	Form template for defining position success factors and setting performance expectations for new or transferred employee
Performance - Probationary Periods	INSTRUCTIONS. Probationary Period Review Form	W	Instructions for Managers that accompany the Probationary Period Review Form
Performance - Probationary Periods	Probation Completion Letter	W	Letter template for Managers to provide formal, written confirmation of successful completion of a probationary period
Performance - Probationary Periods	INSTRUCTIONS. Probation Completion Letter	W	Instructions for Managers that accompany the Probation Completion Letter
Performance - Probationary Periods	Probation Extension Letter	W	Letter template for Managers to provide formal, written notification of probationary period extension
Performance - Probationary Periods	INSTRUCTIONS. Probation Extension Letter	W	Instructions for Managers that accompany the Probation Extension Letter
Performance - Probationary Periods	Extended Probation Completion Letter	W	Letter template for Managers to provide formal, written confirmation of successful completion of a probationary period that had been extended
Performance - Probationary Periods	INSTRUCTIONS. Extended Probation Completion Letter	W	Instructions for Managers that accompany the Extended Probation Completion Letter
Performance - Performance Reviews	Process Guide for Managers - Performance Reviews	W	Step-by-step process for the performance review process, tells managers who's responsible for each step, and provides point-and-click access to other documents used in the process.

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Performance - Performance Reviews	Annual Performance Review Form	W	Form template for use conducting formal annual performance reviews
Performance - Performance Reviews	INSTRUCTIONS. Annual Performance Review Form	W	Instructions for Managers & Staff that accompany the Annual Performance Review Form
Performance - Performance Reviews	Interim Performance Review Form	W	Condensed performance review form for reviews that occur outside the regular annual review cycle
Performance - Performance Reviews	INSTRUCTIONS. Interim Performance Review Form	W	Instructions for Managers and Staff that accompany the Interim Performance Review Form
Performance - PIP	Process Guide for Managers - Performance Improvement Plans	W	Step-by-step process for the performance improvement plan process, tells staff who's responsible for each step, and provides point-and-click access to other documents used in the process.
Performance - PIP	Performance Improvement Plan Form	W	Form template for managers to document and track the Performance Improvement Plan for a direct report
Performance - PIP	INSTRUCTIONS. Performance Improvement Plan Form	W	Instructions for Managers that accompany the Performance Improvement Plan Form
Performance - Involuntary Terminations	Process Guide for Managers - Involuntary Terminations	W	Step-by-step process for conducting an involuntary termination, including who's responsible for each step. It also provides point-and-click access to other documents used in the process.
Performance - Involuntary Terminations	Performance Management Overview Guide	W	Guide for managers with direct reports. Provides overview information and guidelines regarding performance management

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Job Evaluation	Job Activity Log	E	Spreadsheet template used by all staff to record individual job activities and time spent on each activity over a period of time
Job Evaluation	INSTRUCTIONS. Job Activity Log	W	Instructions for Managers & Staff that accompany the Job Activity Log
Job Evaluation	List of Competencies	W	Guide that provides a 'menu' of categorized behavioral competencies and success traits
Job Evaluation	Job Procedures Form	W	Form template that will help your company capture and record the responsibilities and tasks in a position, as well as how to do each one.
Job Evaluation	INSTRUCTIONS. Job Procedures Form	W	Instructions for Managers & Staff that accompany the Job Procedures Form
Job Evaluation	Job Description Form	W	Form template for creating consistently structured job descriptions
Job Evaluation	INSTRUCTIONS. Job Description Form	W	Instructions for Managers & Staff that accompany the Job Description Form
Compensation	Contractor Rate Calculation Form	E	Spreadsheet used by HR or Managers for calculating contractor rates

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Compensation	INSTRUCTIONS. Contractor Rate Calculation Form	W	Instructions for Managers & HR that accompany the Contractor Rate Calculation Form
Compensation	Annual Salary Review Spreadsheet	E	Spreadsheet used by HR to review base salaries and determine increases or adjustments
Compensation	INSTRUCTIONS. Annual Salary Review Spreadsheet	W	Instructions for HR Staff that accompany the Annual Salary Review Spreadsheet
Compensation	Short-Term Incentive Plan	W	Description of the company incentive plan
Compensation	Salary or Title Change Confirmation Letter Script	W	Script for a letter to confirm a change in an employee's salary or position title.
Compensation	Process Guide for HR - Annual Salary Reviews	W	Step-by-step process for conducting annual salary reviews, tells staff who's responsible for each step, and provides point-and-click access to other documents used in the process.
Compensation	Request & Justification for Compensation Adjustment Form	W	Form for HR to propose and justify a compensation adjustment for an employee
Compensation	INSTRUCTIONS. Request & Justification for Compensation Adjustment Form	W	Instructions for HR Staff that accompany the Request & Justification for Compensation Adjustment Form
Compensation	Short-Term Incentive Plan Calculation Spreadsheet	E	Spreadsheet used by HR for calculating short-term incentive plan/bonus plan payouts
Compensation	INSTRUCTIONS. Short-Term Incentive Plan Calculation Spreadsheet	W	Instructions for HR Staff that accompany the Short-Term Incentive Plan Calculation Spreadsheet
Compensation	Staffing Costs Calculation Spreadsheet	E	Spreadsheet used by HR to record, calculate, and report on all staff-related costs

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Compensation	INSTRUCTIONS. Staffing Costs Calculation Spreadsheet	W	Instructions for HR Staff that accompany the Staffing Costs Calculation Spreadsheet
Compensation	Salary Increase Decline Letter Script	W	Letter script for HR to deny or postpone a salary increase
Compensation	Bonus/Incentive Plan Payment Confirmation Letter Script	W	Letter script for HR to notify an employee of a bonus or incentive plan payment
Compensation	Employee Total Compensation Calculation Spreadsheet	E	Spreadsheet used by HR to calculate the value of total compensation per employee, including base salary, paid time off, statutory remittances, benefits, and additional cash compensation
Compensation	INSTRUCTIONS. Employee Total Compensation Calculation Spreadsheet	W	Instructions for HR Staff that accompany the Employee Total Compensation Calculation Spreadsheet
Employee Engagement	Recognition Award Nomination Form	W	Form for nominating colleagues to receive annual recognition awards
Employee Engagement	INSTRUCTIONS. Recognition Award Nomination Form	W	Instructions for staff that accompany the Recognition Award Nomination Form
Employee Engagement	Employee Survey Questionnaire	W	Template for an employee survey questionnaire to solicit feedback from employees about their work experience
Employee Engagement	INSTRUCTIONS. Employee Survey Questionnaire	W	Instructions for Staff that accompany the Employee Survey Questionnaire
Employee Engagement	Employee Feedback Form	W	Form for capturing employee feedback and/or questions

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Employee Engagement	INSTRUCTIONS. Employee Feedback Form	W	Instructions for Staff that accompany the Employee Feedback Form
Employee Engagement	Annual Social Events Plan	W	Template for planning and budgeting for annual company social events
Employee Engagement	INSTRUCTIONS. Annual Social Events Plan	W	Instructions for HR Staff and Social Committee members that accompany the Annual Social Events Plan
Training & Development	Skills Gap Assessment Form	W	Form for assessing the immediate training needs of new hires, or existing employees transferred or promoted into new positions
Training & Development	INSTRUCTIONS. Skills Gap Assessment Form	W	Instructions for Managers that accompany the Skills Gap Assessment Form
Training & Development	Conference or Training Report Form	W	Form for documenting participation in a conference or training activity
Training & Development	INSTRUCTIONS. Conference or Training Report Form	W	Instructions for Staff that accompany the Conference or Training Report Form
Training & Development	Training or Conference Pre-Approval Form	W	Form for approving staff participation in accredited courses, training, conferences, or other events
Training & Development	INSTRUCTIONS. Training or Conference Pre-Approval Form	W	Instructions for Staff that accompany the Training or Conference Pre-Approval Form
Training & Development	Training Reimbursement Agreement	W	Template for a contractual Agreement between your company and an employee embarking on a training initiative that exceeds a company-determined cost ceiling.

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Training & Development	INSTRUCTIONS. Training Reimbursement Agreement	W	Instructions for HR Staff that accompany the Training Reimbursement Agreement
Training & Development	Course Completion and Reimbursement Form	W	Form for staff in your company to submit their final marks for accredited courses and receive approval for reimbursement.
Training & Development	INSTRUCTIONS. Course Completion and Reimbursement Form	W	Instructions for Managers that accompany the Course Completion and Reimbursement Form
HR Administration	Relocation Assistance Guide	W	Reference guide for HR staff, used to outline company policy regarding relocation assistance, including eligibility for reimbursements and allowances.
HR Administration	Employment Confirmation Letter Script	W	Letter script used to confirm a staff member's employment with your company.
HR Administration	Employee Reference Letter Scripts	W	Series of scripts for creating an employee reference letter.
Orientation & Onboarding	New Hire Preparation Guide for Administrators	W	Step-by-step process for bringing a new hire on board, and provides your administrative staff with point-and-click access to the documents needed for each step.
Orientation & Onboarding	Process Guide for HR & Managers - New Hire Preparation	W	Step-by-step process for new hire preparation, tells staff who's responsible for each step, and provides point-and-click access to other documents used in the process.
Orientation & Onboarding	Orientation Presentation	PPT	Presentation template used for orientation of new hires

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Office Administration	Travel Authorization & Cash Advance Request Form	W	Form for estimating travel costs, obtaining approval prior to travel, and requesting cash advances
Office Administration	INSTRUCTIONS. Travel Authorization & Cash Advance Request Form	W	Instructions for Staff that accompany the Travel Authorization & Cash Advance Request Form
Office Administration	Trip Report Form	W	Form used to document and report on the outcomes of a business trip.
Office Administration	INSRUCTIONS. Trip Report Form	W	Instructions for Staff that accompany the Trip Report Form
Office Administration	Expense Report Form	E	Spreadsheet form for submitting requests for reimbursement of work-related expenses
Office Administration	INSTRUCTIONS. Expense Report Form	W	Instructions for Staff that accompany the Expense Report Form
Office Administration	Annual Budget Process Guide	W	Guide for managers outlining the budgeting process and guidelines
Office Administration	Meeting Planner Form	W	Form for planning and documenting formal meetings
Office Administration	INSTRUCTIONS. Meeting Planner Form	W	Instructions for Staff that accompany the Meeting Planner Form
Office Administration	Business Card Order Form	W	Form for requesting and authorizing an order for staff business cards

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Office Administration	INSTRUCTIONS. Business Card Order Form	W	Instructions for Administrators that accompany the Business Card Order Form
Office Administration	Fax Template	W	Cover page used to ensure consistent use of company brand and standard formatting when sending company faxes
Office Administration	INSTRUCTIONS. Fax Template	W	Instructions for Staff that accompany the Fax Template
Office Administration	Employment Application Form	W	Print-ready application form that allows walk-in applicants to apply for positions in the company
Office Administration	INSTRUCTIONS. Employment Application Form	W	Instructions for HR Staff that accompany the Employment Application Form
Staff Departures	Exit Interview Form	W	List of exit interview questions and accompanying instructions for conducting exit interviews and soliciting feedback from employees who are leaving your company.
Staff Departures	INSTRUCTIONS. Exit Interview Form	W	Instructions for HR Staff that accompany the Exit Interview Form
Staff Departures	Staff Departure Checklist	W	Checklist that describes and assigns the steps to be followed when an employee leaves your company.
Staff Departures	INSTRUCTIONS. Staff Departure Checklist	W	Instructions for Staff that accompany the Staff Departure Checklist

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Staff Directory and Organizational Chart	Staff Profile Form	W	Form used to help colleagues learn more about each other and the skills each person has to offer
Staff Directory and Organizational Chart	INSTRUCTIONS. Staff Profile Form	W	Instructions for Staff that accompany the EXAMPLE. Staff Profile Form
Staff Directory and Organizational Chart	Staff & Telephone Directory	W	Company directory listing staff names and contact information, with a link to each staff member's personal profile
Staff Directory and Organizational Chart	INSTRUCTIONS. Staff & Telephone Directory	W	Instructions for Managers that accompany the Staff & Telephone Directory
Staff Directory and Organizational Chart	Administrative Staff Directory	W	Company directory listing all company administrative assistants and areas of responsibility, including back-up
Staff Directory and Organizational Chart	INSTRUCTIONS. Administrative Staff Directory	W	Instructions for Administrators that accompany the Administrative Staff Directory
ConnectsUs Resource	ConnectsUs Style Guide	W	Reference guide that lists text styles used in ConnectsUs Word documents.