HR Toolkit™
FOR SMALL BUSINESS & HR CONSULTANTS

Date completed/revised: DD/MM/YYYY

Position Details

Title	Accountant
Reports To	Insert title, not individual's name
Department	Finance
Position Status	☐ Employee ☐ Contractor ☐ Consultant ☐ Full-Time ☐ Part-Time ☐ On-going ☐ Term Term End Date (if applicable): DD/MM/YYYY
Eligible for Benefits	☐ Yes ☐ No Comments if applicable
Overtime Exemption Status	☐ Exempt ☐ Non-Exempt
Variable Compensation	☐ Bonus ☐ Commission ☐ Shift Premium ☐ Car Allowance ☐ Not applicable
Hours per Week	Insert actual expected hours of work per week, excluding breaks or lunch/week
Location	
Job Classification	CUSTOMIZER: If classifications have been established, insert job categories. Below shows an example. Otherwise, delete this row ☐ Clerical ☐ Administrator ☐ Coordinator ☐ Manager ☐ Director ☐ VP
Salary Range	Insert salary range, or insert: "As per Job Classification"
Direct Reports	As of DD/MM/YYYY but subject to change, position is responsible for Insert number direct reports, as follows: ♦ Title. Insert additional bullets as required ☐ Not Applicable

Document #: **JD-HR-4304-M-1.0**

Document Owner: HR

Last Updated: <insert date>

This template is included in the ConnectsUs HR™ Toolkits.

FOR SMALL BUSINESS

FOR HR CONSULTANTS

Set up your HR Department	Create HR for Clients
A complete HR Toolkit for small business to create and maintain your HR fundamentals.	HR Toolkit for Small Business, but made for HR consultants with the following differences:

Set up your HR Department

A complete HR Toolkit for small business to create and maintain your HR fundamentals.

Create your HR materials

- 260+ premium templates to create contracts, employee manuals, forms, spreadsheets and manager guides

- Download your HR folders

- Identify your HR priorities

- 22 HR topics

- Create HR intranet

Support your HR Function

- COVID-19 Portal

- Legislation Portal

- Remote Workforce Portal

- Mental Health Portal

- Diversity & Inclusion Portal

- Weekly updates, email notifications

- Help & support. With real humans!

Create HR for Clients

HR Toolkit for Small Business, but made for HR consultants with the following differences:

- Special licensing for use with clients

- Additional module + additional download of pre-assembled folders and templates to create your own master HR toolkit to re-use for new clients

- Pricing.

e.   Handles monthly, quarterly and annual closings.

f.   Ensures timely bank payments.

g.   Manages balance sheets and profit/loss statements.

h.   Audits financial transactions and documents.

i.   Reinforces financial data confidentiality and conducts database backups when necessary.

j.   Computes taxes and prepares tax returns.

k.   Resolves accounting discrepancies.

l.   Determines payroll requirements; maintains payroll data; processes monthly payrolls.

m.   Interacts with internal and external auditors when completing audits.

n.   Complies with financial policies and regulations.

o.   Maintains the implementation of accounting and accounting control procedures.

p.   Recommends, develops and maintains financial data bases, computer software systems, and manual filing systems.

2.   **Managing Employees** Example 20%

a.   Explains billing and accounting policies to staff, vendors, and clients.

b.   Assists in hiring and training junior accounting staff.

c.   Plans work and delegates clerical functions.

d.   Supervises the input and handling of financial data and reports for the Company's automated financial systems.

e.   Writes performance reviews, recommending certain action plans for employee development.

3.   **Insert high-level responsibility   Example 20%**

a.   List key tasks associated with that responsibility

b.

c.

d.

Job-Related Technical Skills

Skills	Proficient	Experience with	Familiar with
Corporate tax accounting	x		
Risk management		x	

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- Adheres to procedures and standards.
- Possesses a strong ability to focus on tasks and priorities amidst continuous distractions.

MANAGING WORK

- Establishes a course of action for others to accomplish specific goals.
- Communicates objectives and goals.
- Plans assignments, staffing, and resources.
- Identifies priorities, critical paths, and deadlines.
- Schedules meetings, projects, and tasks.
- Establishes process and procedures.
- Coordinates and adjusts work plans.
- Uses planning, tracking, or time management tools.
- Develops and/or adheres to budget.

BEHAVE ETHICALLY / WITH INTEGRITY

- 'Walks the talk' and ensures that own behavior and that of others is consistent with Company values and beliefs.
- Takes pride in being trustworthy, open, honest and direct.
- Acts on values when it's not popular or easy to do so.
- Is prepared to take a stand on issues based on doing the right thing for the Company.
- Admits mistakes.

DECISION MAKING

- Identifies purposes and objectives, assesses situations, and makes decisions while exhibiting judgment and a realistic understanding of issues.
- When appropriate, involves others in the process.
- Uses reason even when dealing with emotional topics.
- Provides rationale for decision. Evaluates results.

TEAMWORK / COLLABORATION

- Works cooperatively and effectively with others to set goals, resolve problems, and make decisions.
- Promotes collaboration and interaction.
- Works effectively with people with different abilities and perspectives.
- Resolves conflict quickly and lets it go.

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Acknowledgement

Accepted and agreed to by:

EMPLOYEE

Employee Name	
Signature	Date

MANAGER APPROVAL

Manager Name	Manager Title
Signature	Date

NEXT LEVEL APPROVAL

All job descriptions require approval by CUSTOMIZER: Insert approval position level 1. Example: Department VP, or delete this section if not applicable.

Name	Title
Signature	Date

HR APPROVAL

All positions require review and approval by HR CUSTOMIZER: Insert HR approval level. Example: HR Manager, or delete this section if not applicable.

Name	Title
Signature	Date

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