**Date completed/revised:** DD/MM/YYYY

# Position Details

| | |
|---|---|
| **Title** | Office Manager |
| **Reports To** | Insert title, not individual's name |
| **Department** | Administration |
| **Position Status** | ☐ Employee  ☐ Contractor  ☐ Consultant<br>☐ Full-Time  ☐ Part-Time  ☐ On-going<br>☐ 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<br>☐ 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<br>☐ Clerical  ☐ Administrator  ☐ Coordinator<br>☐ 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:<br>♦ Title. Insert additional bullets as required<br>☐ Not Applicable |

This template is included in the ConnectsUs HR™ Toolkits.

**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

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- Pricing.

a. Maintains and upkeeps office equipment by organizing repairs and upgrades.

b. Orders and maintains office supplies.

c. Coordinates with IT department to resolve computer and system problems.

d. Liaises with landlord, insurance providers, and security, maintenance service providers, IT services providers.

e. Follows up on maintenance agreements and contracts.

f. Administrative duties:

  i. Organizes appointments and meetings.

  ii. Maintains calendars and schedules.

  iii. Prepares and distributes correspondence.

  iv. Answers and directs incoming calls.

3. **Policies & Procedures  Example 20%**

a. Designs and implements improvements to existing procedures.

b. Communicates new and upgraded HR policies and procedures.

c. Ensures employee adherence to changes in policies and procedures.

4. **Bookkeeping  Example 20%**

a. Data entry.

b. Monitors and records expenses.

c. Follows up on overdue accounts.

d. Manages petty cash.

e. Processes accounts receivable and payable.

f. Overall responsibility for time and absences tracking.

g. Administers benefits.

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

a. List key tasks associated with that responsibility

b. 

c. 

d. 

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HRToolkit™
FOR SMALL BUSINESS



HRToolkit™
FOR HR CONSULTANTS

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| --- | --- |

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- Listens actively.

## PROBLEM SOLVING

- Assesses challenges to identify causes.
- Gathers and processes relevant information.
- Generates creative solutions and finds a way to make it work.
- Makes recommendations and/or resolves the situation.
- Acknowledges when one doesn't know something and takes steps to find the answer.

## PLANNING / ORGANIZATION SKILLS / TIME MANAGEMENT

- Establishes a realistic and systematic course of action for self and others to accomplish a specific goal.
- Sets the right priorities.
- Utilizes planning and/or time management tools.
- Monitors progress and makes necessary corrections.
- Controls interruptions.
- Accomplishes work in a timely manner.

## CRITICAL THINKING

- Uses methods of logical inquiry and reasoning.
- Recognizes the existence (or non-existence) of logical relationships in work.
- Tests conclusions and generalizations.
- Applies logical reasoning and considers why status quo or suggested solution won't work.
- Looks forward to understand the consequences of a situation.
- Makes connections between information and arguments.
- Analyzes how parts of a whole interact to produce outcomes in complex systems.

## DRIVE FOR RESULTS / TENACITY / BIAS FOR ACTION

- Strives for results and focuses on reaching goals.
- Overcomes obstacles, pressure, difficult situations, and conflicting priorities.
- Sets high performance standards for self and others.
- Is tenacious, persistent, and resourceful.
- Translates ideas into action and execution.
- Understands how to get work done through others.

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FOR SMALL BUSINESS



FOR HR CONSULTANTS

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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 | |