

HR STARTER PACK

Essential templates and implementation tools for growing South African employers

Practical South African employer resource • July 2026

How to use this pack

Adapt each template to the employer, role, industry, bargaining council and actual working arrangement. The pack supports HR administration; it is not a substitute for matter-specific legal advice.

Pack contents

- HR setup checklist
- Employee information form
- New employee onboarding checklist
- Job description template
- Probation review form
- Leave application form
- Performance improvement plan
- Disciplinary record checklist
- Employee exit checklist
- Monthly HR control sheet

1. HR setup checklist

- ☐ Confirm applicable legislation, bargaining council and sector requirements.
- ☐ Prepare role-specific contracts and written particulars.
- ☐ Create a secure employee file for each employee.
- ☐ Adopt and communicate workplace policies and disciplinary rules.
- ☐ Set payroll cut-off, leave and attendance procedures.
- ☐ Register and maintain UIF, COIDA and employer records as applicable.
- ☐ Assess Employment Equity status and reporting obligations.
- ☐ Create probation, performance and expiry-date reminders.

2. Employee information form

Full names and surname: _____

Preferred name: _____

ID/passport number: _____

Residential address: _____

Mobile number and email: _____

Emergency contact and relationship: _____

Bank name, account number and branch code: _____

Income tax number: _____

Job title, department and manager: _____

Start date, pay frequency and basic remuneration: _____

3. New employee onboarding checklist

Action	Responsible	Date	Complete
Signed contract received			☐
ID and banking proof verified			☐
Tax and payroll information captured			☐
Job description discussed			☐
Policies issued and acknowledged			☐
Systems and equipment issued			☐
Health and safety induction completed			☐
Probation review dates scheduled			☐

4. Job description template

Job title: _____

Department: _____

Reports to: _____

Role purpose: _____

Key responsibilities: _____

Decision-making authority: _____

Minimum requirements: _____

Performance measures: _____

Working conditions: _____

5. Probation review form

Employee: _____

Position: _____

Review date: _____

Reviewer: _____

Probation period: _____

Assessment area	Meets	Needs support	Comments
Quality of work	☐	☐	
Productivity	☐	☐	
Attendance	☐	☐	
Conduct	☐	☐	
Role knowledge	☐	☐	
Communication	☐	☐	
Teamwork	☐	☐	

Agreed support and actions

Training, guidance or resources: _____

Next review date: _____

Outcome: _____

6. Leave application form

Employee: _____

Type of leave: _____

First day: _____

Last day: _____

Working days requested: _____

Reason/supporting document: _____

Manager decision: _____

Payroll instruction: _____

7. Performance improvement plan

Performance gap	Required standard	Support/action	Review date

Employee comments: _____

Final review outcome: _____

8. Disciplinary record checklist

- ☐ Applicable workplace rule identified
- ☐ Allegation and dates recorded
- ☐ Evidence and witnesses identified
- ☐ Employee given reasonable notice
- ☐ Right to representation explained
- ☐ Meeting/hearing minutes retained
- ☐ Mitigating and aggravating factors considered
- ☐ Outcome and reasons recorded
- ☐ Employee received outcome
- ☐ Warning validity and follow-up date captured

9. Employee exit checklist

- ☐ Written resignation or termination outcome filed
- ☐ Final working date and notice confirmed
- ☐ Leave and final payroll inputs approved
- ☐ Company property returned
- ☐ System access removed
- ☐ Confidential information secured
- ☐ UI19/certificate of service prepared where applicable
- ☐ Employee file closed and retained securely

10. Monthly HR control sheet

Control	Status	Owner	Due date
New starters and contracts	☐		
Probation reviews	☐		
Fixed-term expiries	☐		
Leave and absenteeism	☐		
Warnings and performance plans	☐		
Payroll changes	☐		
Training actions	☐		
EE/COIDA/UIF actions	☐		

Important: Apply fair reasons and fair procedures. Refer high-risk dismissals, incapacity, retrenchment, discrimination and CCMA matters for specialist advice where required.