

FOR U.S. SMALL BUSINESSES · 1-500 EMPLOYEES

The HR *Self-Service* Toolkit.



25 templates every small-business owner needs — the ones we pull most often from the AllMyHR Membership library.

A LETTER FROM ALLMYHR

Why we made this.

We built this toolkit because we kept hearing the same thing from small-business owners: *"I just need the templates. I'll fill them out myself."*

You're holding 25 of the most-used templates from AllMyHR's full Membership library. Hiring documents that keep you out of misclassification trouble. Onboarding paperwork that gets new employees productive faster. Performance and termination templates that protect you when an employee dispute escalates.

Customize them, sign them, send them. Each template is laid out so you can copy it into your own document, or print it directly. We've flagged the sections you should never change without legal review — like the at-will language and the wage-classification flags.

Two notes before you start:

- 1 State law varies.** A handbook policy that's compliant in Texas may not be in California. The notes throughout this toolkit flag where state-specific edits are typically needed. Our full Membership library handles state-specific variations automatically — this toolkit gives you national defaults.
- 2 Disclaimer:** These templates are provided for general informational purposes only and do not constitute legal or HR advice. Employment law varies by state and changes often. Review and customize each template for your business, and consult a qualified attorney or HR professional before use. AllMyHR makes no warranties as to accuracy or compliance and assumes no liability for use of these materials. Licensed for internal use only. © AllMyHR. All rights reserved.

— *The AllMyHR Team*

IN YOUR CORNER

You don't need to become an HR expert. You need one in your corner.

QUICK START

How to use this toolkit.

Four things to know before you fill in the first blank. Two minutes here saves an hour later.

01

Read the intro on each template

Every template opens with one or two sentences about *when to use it* — and just as importantly, when not to.

02

Replace the bracketed variables

Anything in [BRACKETS] is a placeholder for your company info. Find-and-replace is your friend.

03

Watch for the legal-sensitive flags

Sections marked with the amber footnote are clauses you should not edit without legal review. At-will language. Classification flags. Don't freelance these.

04

Adapt to your company

Retype each template into your own document, swapping in your company name, dates, and dollar figures. Keep the legal-flagged clauses verbatim.

Legend & symbols

[VARIABLE]

A field you fill in with your own data — company name, employee name, dates, dollar amounts.

REQUIRED

This template (or section) is legally required for employers in most U.S. states. Skip it at your peril.

DO NOT EDIT

Boilerplate that protects you in court. Talk to counsel before changing the wording.

STATE-SPECIFIC

Default language is national. CA, NY, IL, MA, WA typically need additional clauses.

01 HIRING & OFFER Offer Letter (Exempt & Non-Exempt)

REQUIRED

FLSA FLAG

Sent after a verbal offer to formalize compensation, classification, and start date before the candidate accepts.

REQUIRED FIELDS

Candidate name, position, classification (or), pay rate, start date, supervisor, at-will clause.

COMPLIANCE NOTES

FLSA classification is the legal trigger. CA, NY require offer letters in writing for any pay above thresholds.

OFFER OF EMPLOYMENT

Confidential — for the addressee only

[DATE]

[CANDIDATE_NAME]

[CANDIDATE_ADDRESS]

Dear [FIRST_NAME],

We are pleased to offer you the position of [JOB_TITLE] at [COMPANY_NAME], reporting to [SUPERVISOR_NAME]. Your start date will be [START_DATE].

1. Compensation & Classification

You will be classified as [EXEMPT / NON-EXEMPT] under the Fair Labor Standards Act. Your [ANNUAL_SALARY / HOURLY_RATE] is [\$AMOUNT], paid [BI-WEEKLY / SEMI-MONTHLY].

2. At-Will Employment

Your employment with [COMPANY_NAME] is **at-will**, meaning either you or the Company may terminate the employment relationship at any time, with or without cause or notice. Nothing in this letter constitutes a contract for a fixed term.

CANDIDATE SIGNATURE & DATE

HIRING MANAGER & DATE



Don't change the at-will clause. The wording above has been used in employment litigation for 30+ years. Removing or softening it weakens your defense in a wrongful-termination claim.

02

HIRING & OFFER · MISCLASSIFICATION RISK

REQUIRED

CA · NJ · MA

Independent Contractor Agreement

Use when engaging a 1099 worker for a defined scope. Misclassification is the single most expensive HR mistake a small business makes.

REQUIRED FIELDS

Contractor name, scope of work, deliverables, fee structure, IP ownership, indemnification, term & termination.

COMPLIANCE NOTES

CA's **AB5 / ABC test** assumes worker is an employee unless all three prongs are met. NJ & MA use ABC too. Default language assumes the IRS 20-factor test.

INDEPENDENT CONTRACTOR AGREEMENT

Effective [EFFECTIVE_DATE]

This Agreement is between [COMPANY_NAME] ("Company") and [CONTRACTOR_NAME] ("Contractor").

1. Scope of Work

Contractor agrees to provide the following services: [SCOPE_DESCRIPTION]. Deliverables are listed in **Exhibit A**.

2. Independent Contractor Status

Contractor is engaged as an independent contractor and not as an employee. Contractor: **(a)** controls the means and methods of performing the services; **(b)** uses Contractor's own equipment; **(c)** is free to provide services to other clients; and **(d)** is responsible for all taxes, insurance, and benefits.

3. Compensation

FEE STRUCTURE

[\$RATE / DELIVERABLE / RETAINER]

PAYMENT TERMS

Net [30] from invoice

TERM START

[START_DATE]

TERM END

[END_DATE / ONGOING]

4. Intellectual Property

All work product created under this Agreement is "work made for hire" and the property of [COMPANY_NAME].

CONTRACTOR SIGNATURE & DATE

COMPANY AUTHORIZED SIGNATORY

MORE HIRING TEMPLATES

Four more in this category.

Here's what each one is and when to reach for it. The full body of every template appears later in this PDF.

03 **REQUIRED**

Form I-9 (Employment Eligibility)

Federal form, due within 3 business days of start date. Audit penalties: \$281–\$2,789 per missing form.

DON'T EDIT · FEDERAL FORM

04 **REQUIRED**

Form W-4 (Tax Withholding)

Federal form. Most states have a parallel state W-4 (CA DE 4, NY IT-2104, etc.) — included in state appendix.

STATE-SPECIFIC VARIANTS

05

Background Check Authorization

FCRA-compliant authorization. Stand-alone document — FCRA *requires* this not be combined with the application.

FCRA · STAND-ALONE DOCUMENT

06

Reference Check Form

Standardized questions to ask former employers. Keeps your hiring process defensible if a candidate is later terminated.

OPTIONAL · BEST PRACTICE

COMPLIANCE NOTE

Hiring is the most-audited HR function. The DOL, EEOC, ICE, and state agencies all have a stake. Get the paperwork right the first time.

07 ONBOARDING & FIRST 90 DAYS 30/60/90-Day Onboarding Checklist

OPTIONAL

Structured plan that gets a new hire productive faster — and gives you a paper trail if performance issues surface in their first quarter.

REQUIRED FIELDS

Hire name, start date, supervisor, role-specific milestones at the 30, 60, and 90-day marks.

WHEN TO USE

Every salaried hire. Hourly hires in roles with a learning curve. Skip for short-term seasonal roles.

30 / 60 / 90-DAY PLAN

For [EMPLOYEE_NAME] · Start [START_DATE]

Day 1–30 · Onboarding

- Complete I-9, W-4, direct deposit, benefits enrollment
- Read employee handbook; sign acknowledgment (Template 12)
- Meet team, supervisor 1:1s scheduled weekly
- Shadow [BUDDY_NAME] on core workflow

Day 31–60 · Ramp

- Take ownership of [PRIMARY_RESPONSIBILITY]
- Mid-point review with supervisor — written feedback recorded
- Complete required compliance training (harassment, safety, security)

Day 61–90 · Independence

- Operate [PRIMARY_RESPONSIBILITY] without supervision
- Set first-quarter goals using performance review template (Template 17)
- End-of-introductory-period review — pass / coach / part ways decision documented

EMPLOYEE ACKNOWLEDGMENT

SUPERVISOR & DATE

ONBOARDING TEMPLATES

Five more for the first 90 days.

These are the documents that get a new hire productive — and that protect you if the relationship goes sideways early.

#	TEMPLATE	WHEN TO USE	STATUS
08	Direct Deposit Authorization	Day 1 of any new hire.	Required
09	Emergency Contact & Beneficiary Form	Day 1. Update annually.	Required
10	Confidentiality & NDA Agreement	Roles with access to customer or financial data.	Best practice
11	Equipment & Asset Receipt	Whenever you issue a laptop, phone, key, or vehicle.	Best practice
12	Handbook Acknowledgment Receipt	End of week one. Re-sign on every handbook update.	Required

! **The Handbook Acknowledgment (12) is the keystone document.** Without a signed acknowledgment, every policy in your handbook is theoretical. With it, you have a documented chain that the employee was on notice. Re-collect signatures on every material update.

13 Annual Performance Review

PERFORMANCE & COACHING

RECOMMENDED

Once-yearly written evaluation. The single most important document if you ever need to defend a termination decision in court.

REQUIRED FIELDS

Goals (set at start of period), 1-5 ratings on each goal, narrative summary, next-period goals, signatures from both employee and manager.

COMPLIANCE NOTES

Be specific. "Exceeds expectations" with no examples is worse than no review at all if you're later sued.

ANNUAL PERFORMANCE REVIEW

Review Period [START_DATE] — [END_DATE]

EMPLOYEE

[EMPLOYEE_NAME]

TITLE

[JOB_TITLE]

REVIEWER

[MANAGER_NAME]

DATE OF REVIEW

[REVIEW_DATE]

Goal-by-goal evaluation

For each goal set at the start of the period, mark the rating and provide one to three sentences of specific evidence.

GOAL	RATING 1-5	SPECIFIC EVIDENCE
<u>[Goal 1]</u>	—	_____
<u>[Goal 2]</u>	—	_____
<u>[Goal 3]</u>	—	_____

Next-period goals

Set [3-5] SMART goals for the next review cycle. These are the benchmark you'll evaluate against next year.

EMPLOYEE · I HAVE READ AND DISCUSSED THIS REVIEW

MANAGER & DATE

PERFORMANCE & COACHING

Documenting the path.

When performance issues surface, written documentation is the difference between a defensible termination and an expensive lawsuit. These four templates create the paper trail.

14

Verbal Warning Documentation

You delivered the warning verbally. Now document it in writing. Without this, the warning legally didn't happen.

15

Written Warning

Step two of progressive discipline. Specifies the issue, the standard, and the consequence of further violation. Employee signs to acknowledge receipt — not agreement.

16

Performance Improvement Plan (PIP)

30, 60, or 90-day formal plan with measurable benchmarks. The legal pre-cursor to a performance-based termination in most cases.

17

Quarterly 1:1 & Goal-Setting Form

Lighter than the annual review. Use quarterly to keep goals current and surface issues before they require formal discipline.



Progressive discipline isn't the law — but it's almost always the right call. "We had a problem with their work for a year and finally fired them" loses in front of a jury. "We documented three escalating warnings, a 60-day PIP, and a final review showing missed benchmarks" wins.

18 SEPARATION & TERMINATION · HIGH-RISK

Termination Letter (For Cause)

REQUIRED

LEGAL REVIEW

The single highest-risk document in this toolkit. Used to document an involuntary separation tied to performance, conduct, or policy violation.

REQUIRED FIELDS

Employee name, last day, reason category (cause / performance / restructuring), final pay terms, COBRA notice trigger, return-of-property checklist.

COMPLIANCE NOTES

Final pay timing varies by state — CA requires **same day**, NY within 7 days, TX next regular payday. State appendix lists all 50.

NOTICE OF TERMINATION OF EMPLOYMENT

Confidential personnel record

[DATE]

Dear [EMPLOYEE_FIRST_NAME],

This letter confirms that your employment with [COMPANY_NAME] is terminated effective [LAST_DAY_DATE].

1. Reason for termination

Your employment is being terminated due to [SPECIFIC_REASON: performance / policy violation / conduct]. This decision follows the documented progressive discipline reflected in your file dated [WARNING_DATES].

2. Final pay

Your final paycheck, including all earned wages and accrued [PTO / VACATION per state law], will be issued [BY_STATE_DEADLINE]. Direct deposit will continue using your existing instructions.

3. Benefits & COBRA

Health coverage ends [END_OF_MONTH / LAST_DAY]. You will receive a separate COBRA continuation notice from [BENEFITS_ADMIN] within 14 days.

4. Return of property

Please return all [COMPANY_NAME] property no later than [DATE]: laptop, phone, keys, badge, credit cards, customer files, and any documents containing confidential information.

SEPARATION TEMPLATES

The rest of the exit kit.

A clean separation produces three things: a final paycheck on the right deadline, a returned laptop, and a former employee who has no reason to call a lawyer. These four templates handle the first two.

#	TEMPLATE	WHEN TO USE	STATUS
19	Voluntary Resignation Acceptance	Employee gave notice. You acknowledge in writing.	Best practice
20	Severance Agreement & Release	Any termination where you offer pay in exchange for a release.	Legal Review
21	Final Pay & PTO Calculation Worksheet	Every separation. State-specific deadlines built in.	Required
22	Exit Interview Form	Voluntary resignations. Skip on for-cause terminations.	Optional

STATE-SPECIFIC FINAL PAY

CA: same day. NY: 7 days. TX, FL: next regular payday. Check your state's labor code for the exact deadline.

SEVERANCE RELEASES

If the employee is over 40, the OWBPA gives them 21 days to consider and 7 days to revoke. Don't shortcut this.

POLICIES & REQUIRED NOTICES

The last three.

National-default policy templates. State-specific clauses live in the appendix — CA, NY, IL, MA, and WA usually need additions.

23

Anti-Harassment & Anti-Discrimination Policy

Required by Title VII. Must include reporting procedure, anti-retaliation clause, and investigation commitment. CA, NY, IL, ME, DE, CT all require additional training and policy components.

DEFAULT: NATIONAL · ADD: STATE-SPECIFIC TRAINING REQUIREMENTS

REQUIRED

LEGAL REVIEW

24

PTO & Sick Leave Policy

Accrual rates, carryover rules, payout-on-separation behavior.

Sick leave is mandated in 18+ states — the default policy is the federal floor, not the ceiling.

DEFAULT: NATIONAL · ADD: CA, NY, NJ, MA, WA, OR, CO, AZ, MD, MI, NV, NM, RI, VT...

REQUIRED

STATE-SPECIFIC

25

Remote Work & BYOD Policy

Eligibility, equipment, expense reimbursement, security expectations, work-hours tracking for non-exempt remote workers. CA & IL require business-expense reimbursement — flagged in the body.

DEFAULT: NATIONAL · ADD: REIMBURSEMENT CLAUSES FOR CA, IL, MA, MT, ND, NH, PA, SD

RECOMMENDED

THAT'S ALL 25

The next page covers what to do when these aren't enough.

WHAT'S NEXT

You just got 25. There are *275 more.*

If this toolkit was useful, the full Professional Membership library is what you actually want — with state variations, training, and a handbook that updates itself.

	THIS TOOLKIT	PROFESSIONAL MEMBERSHIP POPULAR	ADVISOR-LED PLAN
Templates	25	300+	300+
Training courses	0	350+	350+
Auto-updating handbook	No	Yes	Yes
Compliance alerts	No	Monthly	Monthly
Live HR advisors (PHR/SHRM)	No	No	Yes
Cost	Free	\$24/month	\$1 trial → \$99/mo

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- ✓ Built in under an hour

350+ Training Courses

- ✓ Harassment, OSHA, safety, DEI & more
- ✓ One-click assign to person, team, or company
- ✓ Auto-tracking & certificates included

Compliance Portal

- ✓ 3,000+ federal, state & local laws tracked
- ✓ Proactive alerts when laws change
- ✓ Interactive compliance audits

BEFORE ALLMYHR

- ✗ 5+ disconnected tools
- ✗ Constant Googling
- ✗ Expensive lawyer calls
- ✗ Compliance anxiety

AFTER ALLMYHR

- ✓ 1 unified dashboard
- ✓ Expert on speed dial
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