

# THE MOST IMPORTANT DOCUMENTS TO PROTECT YOUR ORGANIZATION

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# I. Onboarding

- A. Application
- B. FCRA Waiver
- C. Bullard-Plawecki Waiver
- D. Background Investigation
- E. Job Description
- F. I-9

JOB DESCRIPTION	
JOB TITLE:	
WAGE / SALARY:	
<b>Position Summary:</b> <small>(A one sentence description of what the position does in your business)</small>	
<b>Essential Job Functions and Responsibilities:</b> <small>(List the major areas of responsibility covered by the position)</small>	
<b>Primary Objectives:</b> <small>(List the main goals and objectives of the position within the business)</small>	
<b>Job Requirements:</b> <small>(List the experience, skill, and education levels required to perform the job)</small>	
<b>Education and Experience:</b> Degree or equivalent experience: Years of experience: Specialized training in: Achieve efficiency: Other requirements/certifications:	
<b>Physical Demands:</b> <small>(List any physical demands that are representative of the physical requirements necessary for the employee to successfully perform the job.)</small>	
<b>Work Environment:</b> <small>(List some characteristics that are representative of the environment the employee will encounter on the job)</small>	
<b>Limitations and Disclaimer:</b>	
<small>This job description indicates in general the nature and levels of work, knowledge, skills, abilities and other essential functions (as covered under the Americans with Disabilities Act) expected of an incumbent. It is not designed to cover or contain a comprehensive listing of activities, duties or responsibilities required of an employee. An employee may be asked to perform other duties as required.</small>	

## II. Retention

- A. At Will Statements
- B. Employment Agreements
- C. Benefit Plan Descriptions
- D. SPD/Plan Documents
- E. Insurance Contracts
- F. Election Forms



## III. Managing the Relationship

- A. Handbooks
- B. Evaluations
- C. Disciplinary Reprimands
- D. Last Chance Agreements
- E. 360 Degree Evaluations



## IV. Protecting Business Assets

- A. Confidentiality Agreement
- B. Intellectual Property Agreement
- C. Non-Compete Agreement
- D. Expectations of Privacy and Monitoring
- E. Insurance



# V. Ending the Employment Relationship

- A. Status Change
- B. Communicating the Decision
- C. Release Documents
- D. Internal Communications
- E. Vendor Communications
- F. Customer Communications
- G. Response to Unemployment