

HR TOOLKIT FOR MANAGERS

Practical templates to guide performance management, employee relations, and onboarding.





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Performance Review Template

Employee Name: _____

Position: _____

Review Period: _____

Performance Criteria (1-5 Rating + Comments)

Job Knowledge and Skills

Quality of Work

Communication and Collaboration

Initiative and Problem-Solving

Goals Achieved

Overall Performance Summary

Manager Feedback and Next Steps

Employee Comments

Manager Signature

Employee Signature

Disciplinary Action Template

Employee Name: _____

Position: _____

Date of Incident: _____

Type of Action: Verbal Warning Written Warning Final Warning Termination

Description of Incident/Behavior

Policy/Expectation Violated

Corrective Action Required

Timeline for Improvement

Next Steps if Not Corrected

Manager Signature

Employee Signature

HR Signature
(if needed)



In-Person Onboarding Checklist

- **Pre-Day 1**

1. Prepare workstation and IT access
2. Send welcome email with schedule
3. Assign onboarding buddy/mentor

- **Day 1–Week 1**

1. Team introductions
2. Review company policies and culture
3. Initial role training
4. Check-in meetings scheduled

- **Week 2–30 Days**

1. Progress check-in
2. Assign first meaningful project
3. Collect feedback on onboarding experience

- **60–90Days**

1. Formal performance check-in
2. Discuss development goals
3. Ensure role clarity and integration



Virtual Onboarding Checklist

- **Pre-Day 1**

1. Ship laptop, headset, and other equipment (test shipping times)
2. Provide login credentials for email, collaboration tools (Slack, Teams, Zoom, etc.), and HR systems
3. Send a “Welcome Packet” with schedule, organization chart, and company values
4. Test accounts and access before the start date
5. Schedule an IT setup call

- **Day 1–Week 1**

1. Virtual welcome meeting with manager
2. Introduce team via video call (icebreaker included)
3. Review company culture, mission, and communication norms (async vs. sync)
4. Schedule short daily check-ins for the first week
5. Assign a “remote buddy” for questions and social connection

- **Week 2–30 Days**

1. Regular 1:1s (weekly or bi-weekly) with manager
2. Provide structured learning modules/training via LMS
3. Assign meaningful projects with clear expectations
4. Encourage participation in virtual team-building or social activities
5. Collect feedback on onboarding experience (survey or check-in)

- **60–90 Days**

1. Formal performance check-in via video call
2. Discuss career development goals
3. Encourage cross-team networking through virtual coffee chats
4. Revisit role clarity and workload

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