



The Organised Employer™

Employee File Planner

A practical step-by-step tool for organising employee records one file at a time

Employee files can become disorganised gradually as a business grows. Use this planner with one current employee file first. Review how it is organised, identify what needs attention and choose only the first three actions. Once the structure works, apply the same approach to the remaining files.

Important: Use initials or an internal employee reference on this planner. Do not add unnecessary confidential employee information.

1. Choose one employee file

Employee initials or internal reference	_____
Review date	_____
Person completing the review	_____
Current main file location	_____

Current file format: ☐ Digital ☐ Paper ☐ Paper and digital ☐ Not sure

Is there one clear employee-file structure? ☐ Yes ☐ No ☐ Not sure

Who currently has access? _____

Does everyone with access genuinely need it for their role? ☐ Yes ☐ No ☐ Not sure

One clear employee-file structure does not mean every record must sit in the same folder. Payroll, banking, health-related or other restricted information may be stored separately with tighter access controls while still being referenced through the employee-file structure.

2. Check the file structure

Mark each item Yes, Needs attention or Not sure.

File organisation check	Yes	Needs attention	Not sure
There is one clear main file location or structure	☐	☐	☐
The file or folder is clearly named	☐	☐	☐
Current records are easy to locate	☐	☐	☐
Drafts are separated from approved documents	☐	☐	☐
Older or superseded versions are separated from current documents	☐	☐	☐
File names make the contents easy to understand	☐	☐	☐
Dates or version numbers are used where helpful	☐	☐	☐
Documents issued to the employee are recorded where applicable	☐	☐	☐
Missing or uncertain items are listed in one place	☐	☐	☐
The file can be understood by another authorised person if needed	☐	☐	☐
The file contains only information relevant and necessary for its employment or administration purpose	☐	☐	☐

3. Review the main record areas

This section helps you review the organisation and current status of the record areas. It does not confirm that every legal requirement has been met.

Record area	In place and current	Missing	Not sure / review
Current contact information has been reviewed	☐	☐	☐
Emergency contact information has been reviewed	☐	☐	☐
Start date and employee reference information	☐	☐	☐
PPS number stored securely where required	☐	☐	☐
Bank details stored securely for payroll use	☐	☐	☐
Current written terms or employment contract	☐	☐	☐
Role, job information and current working arrangements	☐	☐	☐
Changes to role, pay or hours	☐	☐	☐
Document issue or acknowledgement record	☐	☐	☐
Starter information and approved payroll changes	☐	☐	☐
Leave and absence administration records	☐	☐	☐
Leaver and final-pay instructions, where relevant	☐	☐	☐

4. Check access and storage

Not every record needs to be equally accessible. PPS numbers, bank details, payroll information and health-related records may require tighter access controls than general employee paperwork.

Access and storage check	Yes	Needs attention	Not sure
Access is limited to authorised people	☐	☐	☐
Bank details and PPS information are stored securely	☐	☐	☐
Health-related or medical information has appropriately restricted access	☐	☐	☐
Documents are not stored in an openly accessible shared folder	☐	☐	☐
Paper files are stored securely	☐	☐	☐
Digital access can be removed when someone no longer needs it	☐	☐	☐
Important digital records are protected against accidental loss and can be recovered where necessary	☐	☐	☐
The employer has provided employees with privacy information explaining how their personal data is collected, used, stored and shared.	☐	☐	☐

Immediate access or storage issue identified: _____

First action needed: _____

5. Identify current and older versions

Document control check	Yes	Needs attention	Not sure
The current written terms or contract can be clearly identified	☐	☐	☐
Unsigned drafts are separated from approved documents	☐	☐	☐
Older versions are clearly marked or stored separately	☐	☐	☐
A document register or version-control log is used where helpful	☐	☐	☐
Older records are linked to an agreed retention and review process	☐	☐	☐
A review or disposal date can be assigned where appropriate	☐	☐	☐

Do not automatically destroy older employment records simply because they are no longer current. Separate them from working documents and handle them under the employer's agreed retention and review process. Different record types may have different retention requirements.

Documents that need a current version identified:

1. _____
2. _____
3. _____



6. Create the missing-item and review list

Record only the practical information needed to plan the next action.

Item or record area	Current status	Action required	Responsible person	Target date
	☐ Missing ☐ Review			
	☐ Missing ☐ Review			
	☐ Missing ☐ Review			
	☐ Missing ☐ Review			
	☐ Missing ☐ Review			
	☐ Missing ☐ Review			
	☐ Missing ☐ Review			

7. Choose the first three actions

Do not try to complete the whole list immediately. Choose the three actions that would make the file clearer, safer or easier to use.

Action 1

What needs to be done? _____

Who will complete it? _____ Target date: _____

Action 2

What needs to be done? _____

Who will complete it? _____ Target date: _____

Action 3

What needs to be done? _____

Who will complete it? _____ Target date: _____

8. Decide the next support step

- ☐ The file is mainly organised and only needs a small internal tidy-up.
- ☐ Some missing items can be located or completed internally.
- ☐ One or two individual forms or documents may need to be prepared.
- ☐ Several documents need to be reviewed, prepared or reorganised.
- ☐ A document register or repeatable filing structure would help.
- ☐ Several employee files need practical restructuring.
- ☐ Payroll and HR Administration Support or HR Document Support may be useful.
- ☐ I am not sure what should happen next.

9. Apply the structure to the next employee file

Folder or section structure to reuse: _____

File naming format to reuse: _____

Access restrictions to apply: _____

Documents or forms to standardise: _____

Next employee file to review: _____

Target review date: _____

What to do next

You do not need to organise every employee file in one evening. Start with one file, identify the first three actions and use what you learn to create a repeatable structure. If this planner shows the same gaps across several employees, the agreed folder structure and employee administration may be included as part of your payroll and HR administration setup and ongoing monthly support. HR Document Support may also suit businesses that manage payroll elsewhere. The package scope and price will be confirmed before work begins.

Monthly support covers the agreed employee-folder structure and approved payroll and employee documents within the selected package. Historic file rebuilds, large clean-up projects and documents outside the agreed allowance may be quoted separately.

ASK ABOUT PAYROLL AND EMPLOYEE ADMIN SUPPORT

If the same gaps appear across several employee files, the agreed folder structure and employee administration may be included within Payroll and HR Administration Support or HR Document Support. Scope and pricing are confirmed before work begins.

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Useful official information

[Workplace Relations Commission - Statutory Employment Records](#)

[Data Protection Commission - What is personal data?](#)

[Data Protection Commission - Principles of data protection](#)

Service boundary: Everyday Payroll & HR Support provides practical payroll administration, HR document preparation and employee-document organisation support only. It does not provide HR advice, legal advice, employment law advice, tax advice, pension advice, financial advice or regulated consultancy. Employers remain responsible for deciding what records must be held, approving documents, setting access permissions, applying appropriate retention and review periods, and obtaining professional advice where required.