**New employee records checklist**Use this checklist to make sure you’re capturing all the information you’ll need for
your employee records. All records must be kept for at least seven years.

**GENERAL INFORMATION**

|  |  |  |
| --- | --- | --- |
|  | **Mandatory** | **Details** |
|  | Y | Name |
|  | Y\* | Age *\*If under 20 years old, otherwise optional* |
|  | Y | Signed employment agreement, including any accompanying role description  |
|  | Y\* | Offer letter *\*Only if no signed employment agreement yet, otherwise optional* |
|  | Y\* | Visa showing eligibility to work in NZ *\*If relevant* |
|  | Y | Tax code declaration (IR330) |
|  | Y | Postal address |
|  | N | Other contact details |
|  | Y | Emergency contact details |
|  | N | Application form, CV |
|  | Y | Details of agreed wage payment method, such as 'by cash' or a bank account |
|  | Y | Employment start date |
|  | Y\* | Leave entitlement anniversary date \**This may differ from the anniversary of the start date due to closedown periods etc* |
|  | Y\* | Date of termination  |
|  | Y | Type of employment agreement - individual or collective |

|  |  |  |
| --- | --- | --- |
|  | **Mandatory** | **Details** |
|  | Y | Days worked |
|  | Y | Hours worked on those days (including public holidays) |
|  | Y | Days of employment in each pay period |
|  | Y\* | Hours worked doing different *roles \*Only if employee performs different roles for different remuneration* |
|  | Y | Wages paid in each pay period and method of calculation |
|  | Y | Dates and payment for holiday, sick or bereavement leave taken |
|  | Y | Dates and payment for public holidays worked and not worked (if paid for that day)  |
|  | Y | Dates of alternative holidays taken or to be taken, and payment for any alternative holidays paid out |
|  | Y | Day or part of a public holiday agreed to be transferred, including relevant dates (mandatory if applicable) |
|  | Y | Payment (including date of payment) and amount of annual holidays cashed-up in each entitlement year  |
|  | Y | Current entitlement to holiday leave |

**TIME WORKED, WAGES PAID, HOLIDAYS TAKEN AND OWED**