

The HR Toolkit

3 Essential Workplace Documents

Real documents from the BSB40420 Certificate IV in Human Resource Management. Each one comes two ways: a worked Orion Consulting sample so you can see what good looks like, and a blank template you can use at work today.

You do not simply study HR. You produce the documents the work depends on. This toolkit is a sample of that experience.

Applied Capability Education (ACE™)

Vanguard Business Education builds every qualification on Applied Capability Education (ACE™): you create real workplace documents before you finish, not just read about them. This toolkit lets you experience that now.

HOW TO USE THIS TOOLKIT

Three documents, two formats each

Each document below appears twice. First as a worked sample set inside Orion Consulting, the simulated workplace you train in. Then as a blank template you can copy and use in your own workplace straight away.

Position Description	Defines a role: its purpose, duties and the person you are looking for. The starting point of every recruitment process.
Onboarding Checklist	Tracks everything a new starter needs across their first weeks, so nothing is missed and the start feels organised.
Performance Development Plan	Turns a performance conversation into agreed goals, actions and support, with dates to review progress.

A note on the samples: Orion Consulting is a fictional company used for training. Names, roles and details are illustrative.

DOCUMENT 1

Position Description

Used in Cluster 1 to attract and define a role. Below: a worked Orion sample, then a blank template.

WORKED SAMPLE · ORION CONSULTING

Position title	HR Assistant
Department	People and Culture
Reports to	Natalie Singh, HR Manager
Employment type	Full time, ongoing
Position purpose	Support recruitment, onboarding and HR administration so the People and Culture team runs smoothly and employee records stay accurate.
Key responsibilities	Prepare position information and job ads; schedule interviews; assist with candidate assessment; maintain employee records in the HR system; support onboarding of new starters.
Selection criteria	Strong organisation and attention to detail; clear written communication; comfort with HR systems and basic digital tools; a discreet, professional approach to confidential information.
Qualifications	BSB40420 Certificate IV in Human Resource Management or equivalent experience considered.

BLANK TEMPLATE · USE THIS AT WORK

Position title	
Department	
Reports to	
Employment type	
Position purpose	
Key responsibilities	
Selection criteria	
Qualifications	

DOCUMENT 2

Onboarding Checklist

Used in Cluster 1 to give every new starter an organised, consistent first few weeks. Below: a worked Orion sample, then a blank template.

WORKED SAMPLE · ORION CONSULTING (NEW STARTER: HR ASSISTANT)

Done	Task	Owner / by when
<input type="checkbox"/>	Send welcome email and first-day details	HR · before day 1
<input type="checkbox"/>	Set up workstation, logins and HR system access	IT · before day 1
<input type="checkbox"/>	Prepare employment paperwork and tax/super forms	HR · day 1
<input type="checkbox"/>	Office and team introductions	Manager · day 1
<input type="checkbox"/>	Walk through role, expectations and first tasks	Natalie Singh · week 1
<input type="checkbox"/>	Confirm completion of compliance and WHS induction	HR · week 1
<input type="checkbox"/>	Schedule 30-day check-in	Manager · week 1

BLANK TEMPLATE · USE THIS AT WORK

Done	Task	Owner / by when
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		
<input type="checkbox"/>		

DOCUMENT 3

Performance Development Plan

Used in Cluster 2 to turn a performance conversation into agreed goals and support. Below: a worked Orion sample, then a blank template.

WORKED SAMPLE · ORION CONSULTING

Employee	Michael Lin
Role	HR Coordinator
Manager	Natalie Singh, HR Manager
Review period	1 July 2026 to 31 December 2026

Development goal	Actions and support	Review by
Lead the end-to-end onboarding process independently	Shadow two onboardings, then run one with manager review; complete HR system training module	30 Sep 2026
Strengthen confidence in performance conversations	Attend internal coaching session; co-facilitate one review with HR Manager	30 Nov 2026

BLANK TEMPLATE · USE THIS AT WORK

Employee	
Role	
Manager	
Review period	

Development goal	Actions and support	Review by

YOUR NEXT STEP

From sample to portfolio

You have just seen three of the documents you build in the qualification. The full course takes you through the entire employee lifecycle, from recruitment and onboarding to performance, employee relations, compliance, and a workforce improvement project, producing a complete People and Culture Portfolio along the way.

Ready to build the full portfolio?

These three documents are a sample of the People and Culture Portfolio you build in the BSB40420 Certificate IV in Human Resource Management. The course is delivered 100% online, with practical workplace-style assessment, flexible self-paced study and SmartCoach™ support.

Explore the Certificate IV in HR →

or visit vanguardbusinesseducation.edu.au/certificate-iv-in-human-resource-management-bsb40420