



PERSONNEL FILE DOCUMENTATION FOR:

Name:

**HIRE INFORMATION & DOCUMENTATION**

<i>Hire Date:</i>	<i>Office:</i>
<i>Title:</i>	<i>Department:</i>
<i>Hire Wage:</i>	<i>Manager:</i>
<i>Other:</i>	<i>Supervisor:</i>

Archive copies of your engagement:

- Cover letter
- Resume
- References
  
- Offer letter/email from the employer
- Your acceptance letter/email
- Job description
- Employment contract
  
- Job ad
- Your completed application
- Copy of the thank you note you wrote after your interview
  
- Policies, handbooks, expectations, and procedures
- Receipts that you have read/received polices, handbooks, expectations, and procedures
- Employment checks (background, physical, drug/alcohol)
  
- Other: \_\_\_\_\_
- Other: \_\_\_\_\_
- Other: \_\_\_\_\_

Thoughts/Comments:

Archive a copy of your processing for hire:

- Tax forms (e.g., W-9)
- Resume
- References given
  
- Pay and compensation information
- Wage garnishment
  
- Benefit enrollment
- Benefit id #s, cards, instructions
- Benefit coverages
- Benefit beneficiaries
  
- Other: \_\_\_\_\_
- Other: \_\_\_\_\_
- Other: \_\_\_\_\_

Thoughts/Comments:

PERSONAL PERSONNEL FILE

For Personal Use

CHANGE IN EMPLOYMENT INFORMATION

Change Date:	Office:
Change Action:	Department:
New Title:	Manager:
New Wage:	Supervisor:

NOTE: It is perfectly acceptable to request a letter that specifies changes to your employment:

Archive **wage change** information:

- \_\_\_\_\_ Ensure it shows the change date
- \_\_\_\_\_ Ensure it shows the change amount
- \_\_\_\_\_ Ensure it shows the change reason
- \_\_\_\_\_ Send a note to your supervisor that acknowledges the change; keep a copy

Archive **schedule change** information:

- \_\_\_\_\_ Ensure it shows the change date
- \_\_\_\_\_ Ensure it shows the change details
- \_\_\_\_\_ Ensure it shows the change reason
- \_\_\_\_\_ Send a note to your supervisor that acknowledges the change; keep a copy

Archive **contract change** information:

- \_\_\_\_\_ Ensure you have the most recent contract on file
- \_\_\_\_\_ Read it, and note important changes
- \_\_\_\_\_ Send a note to your supervisor that acknowledges the change; keep a copy

Archive **position change** information:

- \_\_\_\_\_ Ensure it shows the change action (promotion, demotion, transfer, other)
- \_\_\_\_\_ Ensure it shows the change reason
- \_\_\_\_\_ Ensure any other changes are detailed (wage, schedule, etc.)
- \_\_\_\_\_ Send a note to your former supervisor with professional thank yous; keep a copy
- \_\_\_\_\_ Send a note to your new that acknowledges with professional thank yous; keep a copy

Archive **termination** information:

- \_\_\_\_\_ Resignation or termination letter
- \_\_\_\_\_ Employer's acceptance of resignation letter
- \_\_\_\_\_ All termination documents (checklists, unemployment notice, etc.)
- \_\_\_\_\_ Application for unemployment and all follow-up communication

PERSONAL PERSONNEL FILE

For Personal Use

**TRAINING / EDUCATION / PROFESSIONAL DEVELOPMENT**

*Keep track of all training and a copy of any certificates; ensure your supervisor receives a copy.*

- \_\_\_\_\_ On the job training checklist
- \_\_\_\_\_ List of completed webinars
- \_\_\_\_\_ Certificates of completion and achievement
- \_\_\_\_\_ Performance improvement plans
- \_\_\_\_\_ Periodic acknowledgement of polices & training
- \_\_\_\_\_ Other: \_\_\_\_\_

Thoughts/Comments:

**PERFORMANCE INFORMATION**

*Keep a copy of any performance related information; ensure your supervisor receives a copy.*

- \_\_\_\_\_ Self-performance review (original to supervisor)
- \_\_\_\_\_ Final copy of performance review
- \_\_\_\_\_ Letter or email that complement your performance
- \_\_\_\_\_ Warnings and/or disciplinary action
- \_\_\_\_\_ Performance improvement plans
- \_\_\_\_\_ Grievances and complaints by you or against you
- \_\_\_\_\_ Other: \_\_\_\_\_

Thoughts/Comments:

**ATTENDANCE AND WELFARE INFORMATION**

*Keep a copy of any attendance and welfare information; ensure your supervisor receives a copy.*

- \_\_\_\_\_ Time off requests and responses
- \_\_\_\_\_ Worker's Comp documentation
- \_\_\_\_\_ FMLA/ADA documentation
- \_\_\_\_\_ Work-related medical information  
(WorkComp, FMLA, ADA, drug/alcohol, etc.)
- \_\_\_\_\_ Other: \_\_\_\_\_

Thoughts/Comments: