

Written Warning – Copy for Personnel File

Employee Name: _____

Job Title: _____

Meeting Date: _____

People Present: _____, _____ (title)

_____, _____ (title)

_____, _____ (title)

[List name(s) as needed]

Summary of Areas of Concern:

[List major/key areas, including date(s) as applicable]

Expectations:

[Describe expectation(s), reference job description or duties, include remedial steps and/or timeline/deadline for improvement if applicable, etc.]

Further Action:

If [describe issue] continues, that could lead to further disciplinary action pursuant to our Personnel Policy and Procedures. We want [Employee Name] to succeed. We hope this has clarified and reinforced our expectations.

I provided a copy of this written warning to [Employee Name] on [date].

Name: _____ Date: _____

Title: _____

[Witness, if applicable]

Name: _____ Date: _____

Verbal Warning – Copy for Personnel File

Employee Name: _____

Job Title: _____

Meeting Date: _____

People Present: _____, _____ (title)

_____, _____ (title)

_____, _____ (title)

[List name(s) as needed]

Summary of Areas of Concern:

[List major/key areas]

Summary of Conversation:

[Recap conversation: describe expectation, timeline/deadline for improvement, etc.]

Plan/Outcome:

If [describe issue] continues, that could lead to further disciplinary action. I explained to [Employee Name] that we want [Employee Name] to succeed. We hope this conversation will clarify and reinforce our expectations.

I reviewed the above expectations with [Employee Name] on _____, 2022.

Name: _____ Date: _____

RECOMMENDATIONS FOR MAINTAINING PERSONNEL FILES (COUNTY PAID EMPLOYEES)

County Employees

Official Personnel File

Advertised Job Announcement
Resume / Application Materials
Letter of Intent / Contract Letter
W-4's (Copy)
Hire Documentation
Current Position Description
Performance Appraisals
Discipline Letters
Recognition/Commendations
Resignation Letter
Retirement Documents

Benefits File

Health Insurance Signup/Documentation
Life Insurance Signup/Documentation
Any other benefits/insurance forms

Medical/Confidential File*

Worker's Comp
Medical Leave
FMLA
Doctor notes, etc.

Supervisor File

Performance Documentation

Payroll File

Timesheets
Leave Requests
W-4's (Original)

** Should be in separate file and separate location from all personnel files.*

*** All I-9 Forms for all employees should be held in one file separate from all personnel files.*