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EMPLOYEE PERSONNEL FILE BASICS



By Diane Shepler

Many small companies, for purposes of this writing, small refers to companies with 125 employees and under, do not have a Human Resource Department. The HR responsibilities generally land on someone in management, or sometimes even an employee in a clerical position, to contend with. In these cases, the most common basic mistakes are within the files. Oh, the dreaded employee personnel file. For some, the personnel file represents the catch-all file where every document, paper, note, etc., from the employee, finds its final resting place. For others, the personnel file is empty; simply a file folder with an employee's name and sometimes their hire date. And lastly, there are those instances where a personnel file is non-existent.

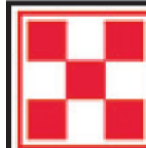
"So, what should a personnel file contain?" you ask. Glad you asked! Certain documents are required to be held within the personnel file such as an employee application and/or resume, W4, and Performance Appraisals of the employee. Additional items to be placed in the personnel file are awards and honors received by the employee, corrective and/or disciplinary actions, and employee emergency contact information.

Now that we have taken a look at what may be stored in the personnel file, let's look at some items that should not be contained in a personnel file. Documents of a medical nature should *not* be placed into the personnel file. A doctor's certificate, benefit enrollment forms containing medical information, disability-related docu-

mentation, medical and/or disability accommodation requests, completed Family Medical Leave forms, work-related injury or illness forms, are all examples of documents of a medical nature that should not be found in a personnel file. Additionally, any medical information pertaining to the employee's dependents should not be placed in the personnel file. A separate medical file is to be established for the storage of such documents of a medical nature.

Form I-9's should not be filed within the employee personnel file. Form I-9's should be maintained in a separate file. This file must be made available in the event of a USCIS inspection. Keeping these forms in a separate file protects your employee's privacy as well as keeping your personnel files out of the inspection avoiding additional questions or probing.

In the next article, we will explore the storage of and access to Employee Personnel and Medical Files.



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