



September



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At AssetHR we talk about effective management in three basic steps; hire smart, manage well, and fire fair. Everything about a great working experience starts with the hiring process. Senior Consultant, Mary Blank Tillman, will help us recognize that even during times when you aren't hiring much or often, you do well to understand and follow solid principles.

Coming in September:

AssetHR E-Newsletter

Dear AssetHR Friends,

HR for Managers

[HR: Employee Personnel Files - Part 2](#)
[What information should be kept in an employee's personnel file?](#)



In the August E-News we spoke of handling an employee's request to see the contents of their personnel file, also commonly referred to as their employee file. This month we direct attention to the contents of an employee file. As a general rule of thumb, only keep information in the file that can legally be the basis for an employment-related decision. Employment decisions include hiring, firing, promotion, demotion, layoff, training opportunities, and all other actions taken regarding employees. Since employment decisions cannot be made on the basis of protected class (age, gender, sexual orientation, color, race, creed, national origin, religion, veteran status, disability), keep all equal employment opportunity records separate from the employee file (this also supports keeping such information private).

Examples of items appropriately kept in employee files include:

- o *Hiring documents:* Application, resume, testing reports, interview notes, background checks, correspondence, employment contract/agreement
- o *Performance documents:* Evaluation/review forms,

Management Avenue: Compensation Strategies

The most successful organizations don't make impromptu salary decisions. Rather the company views the entire compensation package for an employee and connects the value of the employee, through the compensation package, to achievement of their business objectives.

Partner Spotlight:

Mary Blank Tillman, has offered her expertise to senior leaders across a variety of industry providing solutions to the management challenge of effective employee engagement - which starts at the very beginning, with the hiring process. With her emphasis on effective hiring practices, you will find Mary an energetic speaker and discussion facilitator. Join us for this important conversation!

disciplinary action forms, training, job description, promotions or recognition items, exit interviews, termination checklist

- o *Policy items:* Signed acknowledgment of employee handbook or specific policy statements, time off requests
- o *Company issued equipment:* Technology tools (computer, cell phone, etc), Vehicles
- o *Payroll items:* Pay rate changes, timecards, direct deposit forms, W4 withholding form, copies of year end W2's
- o *Safety items:* OSHA required reports of injury, Worker's compensation correspondence
- o *Insurance products:* Enrollment forms or applications for medical, dental, long-term disability, vision plan, and related correspondence
- o *Retirement savings:* 401k enrollments and related correspondence/documents
- o *Emergency contact information*

In order to ensure privacy and security, keep in a separate file the following:

- o *Health Information (HIPAA):* Doctor reports, FMLA requests/correspondence/reports
- o *Credit check info as learned through a background check*
- o *Equal Employment Opportunity forms*
- o *INS Form I-9*

Lead-er-ship

Increasing Your Awareness of Effectively Leading Your Own Ship

The leadership learning services division of AssetHR is titled Relevant Movement. Why that title? Because over the years that we have been involved in our own learning and training others, we've come to understand that "movement" in our careers needs to have purpose. We recognize that it is critical for each of us to have a keen awareness of why we act the way we do in certain situations. Understanding our self-motivation is a key step in directing our performance to be both efficient and effective. We pull it together like this "when you have *motive* to *take action* your movement is relevant." In other words, that movement is important to you. What has been the purpose behind your "movement" this past month?



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