
Tool 12-15

Recordkeeping

BASIC NOTES ON RECORDKEEPING

- ♦ Although the human resources department might have a complete file on each employee, it's important for you to keep your own employee files too.

These files can include

- ♦ job description and revisions
 - ♦ résumés
 - ♦ performance discussion notes
 - ♦ notes on achievements
 - ♦ certificates of courses completed
 - ♦ compliments from customers, other employees, managers
 - ♦ training records
 - ♦ communications
 - ♦ corrective action goals and deadlines.
- ♦ Employee records and files should be reviewed before annual performance appraisals to remind you of employee activities throughout the year.
 - ♦ Ensure that employee files are not easily accessible to other employees or visitors.
 - ♦ Check with your human resources department for the specific regulations concerning your employee files. Although there are laws regarding how long many records must be kept, there are also regulations concerning the destruction of past employee files. Get the latest information and review your files to ensure compliance.

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Recordkeeping

- ♦ Review your filing systems and discard outdated information every year. Filing systems become overloaded and less useful when valuable information is mixed in with obsolete or unimportant records.
 - ♦ Use the same organization system for your paper files and your computer files. This helps you recall the location of information more easily.
 - ♦ Take time to regularly sort records and paper in your inbox and office. Ask yourself whether you need to
 - ♦ act on it
 - ♦ delegate it
 - ♦ file it
 - ♦ toss it.
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