**PERFORMANCE DOCUMENTATION WORKSHEET - SAMPLE**

(To be used when documenting performance concerns)

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| Performance Concern/Incident/Policy Violation (specific behavior – give examples):  ***As discussed during our meeting, I have concerns about your repeated tardiness. You are required to be on time to work and complete your work shift. This is also a violation of department work rules and University attendance policy.*** |
| Describe the impact to department/organization/co-workers and your experience and interpretation of the behavior:  ***Your behavior has the potential of negatively impacting the department. When you are not on time, others have to complete your assign tasks, and it appears as though you do not take your job and/or assignments seriously.*** |
| Described the benefits of new desired behavior:  ***Being on time to work is a performance expectation. It improves department and employee morale and increases team productivity.*** |
| Plan to achieve desired behavior (involve employee):  ***If you require a flexible start and end time, or if you have personal issues preventing your from making it to work on time, please set up a time to meet with me to discuss how you can meet performance expectations.*** |
| Consequences if desired behavior is not achieved:  ***Your failure to meet the expectations outlined may result in further progressive disciplinary action, up to and including termination.*** |
| Date(s) for follow-up, if necessary:  ***30 days from today.*** |
| Additional comments:  ***If you are experiencing personal issues that are preventing you from meeting performance expectations, the Employee Assistance Program is available to help. They may be reached at*** [*www.feieap.com*](http://www.feieap.com)*., Username: SOWI and (866) 274-4723.* |

Employee signature (acknowledge receipt) Date

Supervisor signature Date

cc: Employee Department file

**VERBAL WARNING TEMPLATE**

DATE:

TO:

FROM:

Subject: Verbal Warning / Counseling

Dear (Employee Name),

This memo documents our conversation of \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_, regarding (*describe performance or issue*). During the meeting we spoke about\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ and agreed that going forward you will\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_.

This warning will be place in your employee file, and will be disregarded after 18 months, provided your performance/conduct… reaches and maintains a satisfactory level.

As we discussed, you need to show consistent improvement in (*be specific, whether it is absences/attendance, performance, team work, communication, etc.*) I expect you to (*describe how will this improvement look or be measured*).

To assist you through this process, I agreed to meet with you on a weekly basis for the next three months to provide feedback & guidance.

Please contact me if you have any questions.

Sincerely,

Supervisor’s Signature\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

By my signature below, I acknowledge that I received this verbal warning. My signature does not necessarily indicate agreement with the action taken.

Employee’s Signature\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Cc: Manager’s Name/Title

Human Resources

**SAMPLE WRITE UP – SECOND STEP IN FORMAL DISCIPLINARY PROCESS**

*Date*

*Employee Name*

*Position*

*Employee Name,*

This letter is to inform you that pursuant to the authority vested in me, you are hereby being issued a ***one (1) day suspension*** to begin on Date. You are being issued this suspension based on your continued disregard for the University of Wisconsin System work rules:

1. Failure to report promptly at the starting time of a shift or leaving before the scheduled quitting time of a shift without the specific approval of the supervisor.
2. Unexcused or excessive absenteeism.

3. Failure to notify the supervisor promptly of unanticipated absence or tardiness

**On date of meeting, I met with you along with *IF SOMEONE ELSE WAS PRESENT* to express concerns about your failure to follow the call-in procedures, as well as your inability to get to work on time. At the meeting, you were warned that any further violation of the work rules will result in further progressive disciplinary action.** On ***DATE VIOLATION OCCURRED***, you did not call until four and one-half hours after the start of your shift to report your absence. **This behavior is unacceptable.**

The importance of reporting to work on time and following proper call-in procedures has been stressed to you on numerous occasions. Your actions have placed an undue burden on your co-workers as they strive to provide our students, faculty, staff, and guests with a clean and orderly environment. ***THIS IS AN EXAMPLE. THIS WOULD BE TAILORED BASED ON YOUR SITUATION.***

EMPLOYEE NAME, you are advised that UW Parkside maintains an Employee Assistance Program for use by employees who may be experiencing personal problems which are affecting their work performance. You are encouraged to seek out this campus resource. You can reach the Employee Assistance Program (EAP) at (866) 274-4723 or [www.feieap.com](http://www.feieap.com), online password is SOWI.

Please be advised that any further violation of work rules will result in further disciplinary action, up to and including discharge. If you feel this action has been taken without just cause, you may exercise your right to appeal.

Sincerely,

Your Name

Title

Cc: Human Resources