

HOW TO CREATE A PERSONNEL FILE

STEP1

- •Choose a folder that will accommodate the growth of your company
- •You will need section dividers, and a red one to keep medical records separate
- •Place records in date order with the oldest at the bottom

STEP2

- •The first section should contain the employee's personal information. Use the employee information form. This form should be audited annually, and updated when necessary
- •You should have the employees emergency contact details in this section
- •You can keep the annual holiday booking form in this section too

STEP3

- •The next section should contain the job application forms and CVs.
- •Also in this section you should place contracts of employment, offer letters, and verification documents such as: references, copies of immigation check documents, copies of driving licence and insurance documents.
- Keep information about confirmation of promotions, changes to job roles in this section.

STEP4

•This section should contains forms and documents that the employee had to sign for. For example, issue of PPE, induction form, acknowledgement of handbook

STEP5

- •This section should contain the employee appraisal and review forms, training documents, including certificates and awards.
- Also insert any disciplinaries and grievances documents in this section

STEP6

- •In this last section label the red divider private and confidential to be read by authorised personnel only
- •Keep all medical and sensitive personal data in this section: including, pre-employment medical questionnaires, sick notes and medical records, and return to work forms

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