

USE OF PERSONNEL ACTION REPORT

1.0 Purpose

To provide an official method of reporting, appraising, authorizing, and recording personnel actions including, but not limited to, the following:

Appointments: Temporary, Probationary, Regular

End of Probation

Promotions

Resignation

Dismissal

Death

Other actions having to do with employee's job and/or performance

Disciplinary Actions: Letter of Reprimand, Suspension

Leave: Sick, Accident, Leave of Absence, Return to work, Family and Medical Leave

Salary Increase

Merit Bonus

Additional Duty Pay (Start/Stop)

Change of Address/Phone

2.0 Scope

The Personnel Action (PA) report is a very important document because it becomes a permanent record with reference to each employee's service with the City. Each report must be filled out accurately and completely, giving complete background and reasons for each action. The additional background information may be included as an attachment to the PA form.

3.0 Policy

3.1 The PA must precede the actual fulfillment of the recommended action in every case except for instances when the form is used to justify such actions as sick leave usage. Most reasons for personnel actions are self-explanatory. However, procedures for certain actions are set forth below for information and guidance.

Sick Leave: A PA must be submitted in each instance when an employee is absent from work 3 or more consecutive days because of illness. Under reason for action, a description of the time lost with a note from the attending physician must be indicated. If the leave will result in follow up visits to a health care professional within a 90-day period, the personnel action report should also contain the statement, "**This leave is considered Family and Medical Leave.**" Upon return to work, a medical release signed by the attending physician must be submitted with a PA. Any PA relating to medical or health information will be filed in a medical file maintained in the Human Resources Department and will not be kept in the employee's personnel file. Under special circumstances and with approval of the Director of Human Resources, the department head may require a signed doctor's note when an employee is absent from work for less than 3 days because of illness.

Accident Leave/Limited Duty: A PA must be submitted in each instance when an employee is absent from work 1 or more consecutive days because of a workers compensation injury or

- illness or if the employee is placed on limited duty. Under reason for action, a description of the time lost with a note from the attending physician must be indicated. Upon return to work or a release to limited duty, a medical release signed by the attending physician must be submitted with a PA. If the employee is on limited duty, another PA must be completed upon release to full duty and must be accompanied by a medical release.
- 3.2 The Human Resources Department will complete retirement fund and hospitalization information.
 - 3.3 Each PA should clearly state the “Reason for Action” in the appropriate space provided. For example, if an employee has completed probation, some reference should be given regarding the job performance evaluation report and a copy of the report **must** be attached to the PA.
 - 3.4 All PAs shall be routed to the Director of Human Resources for initial review. The Director of Human Resources shall obtain final approval from the City Manager.
 - 3.5 Upon approval, signed copies shall be distributed to the employee’s personnel jacket, Finance Department, department file and to the employee. The IT Department will receive copies of PA’s for newly hired or terminated employees. The PA will be considered a confidential document. However, the employee always has the right to review his/her own personnel file.

4.0 Distribution

- 4.1 Posting on the Employee Information Site, www.city.lf.org.



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