

Greenville Unitarian Universalist Fellowship Policy

Title: Personnel Files Storage

Previously Revised: May 6, 2014

Approved by the Personnel Committee: April 27, 2017

Approved by Board of Trustees: May 10, 2017

Personnel records are separated into three types of files—a general personnel file, a confidential personnel file and a performance evaluation file.

Maintaining records in separate files allows managers, employees and auditors to see the information they need to make decisions, yet does not allow inappropriate access.

All of these files are kept in locked cabinets or drawers in a locked office. With one exception *, access to these files is limited to the following: current members of the Personnel committee, current Board of Trustees' President and President Elect, the current Fellowship Administrator and an employee's own files . *Current supervisors/managers are not allowed access to the confidential file.

1. General Personnel File – Common personnel matters are kept in this file. These include resume, application, offer letter, W-4 forms, notices of change of name or address, phone or e-mail, background checks, policy manual acknowledgments, temporary agency documents (if applicable), training records, etc. No personal health information of any kind is kept in this file. Salary and wage updates are filed digitally in PowerChurch: payroll module to which the CFO will grant access as appropriate.

2. Confidential File – The following are kept in this file: Employment Eligibility Verification (I-9 forms), employee benefits and health information and workers' compensation records. The I-9 forms are stored separately from the other files, preferably in a binder marked *Employment Eligibility Verification* and arranged chronologically by date of hire.

3. Performance Management File - Performance evaluations and corrective action plans are kept in this file.

At no time are personnel files, or parts thereof, to be removed from the Fellowship Office, altered or destroyed. Photocopying or taking pictures of their contents or parts thereof is not allowed.