

Guidelines & Templates for Performance Management Documentation

Sample documentation:

Written Summary of a Verbal Disciplinary Discussion
Written Warning
Termination Letters
Administrative Leave Letter
Performance Improvement Plan (PIP)

Progressive discipline is an opportunity to educate the employee and to promote successful performance. The goal of any disciplinary action is to improve performance and/or behavior. Policies related to performance management can be found at <http://policies.emory.edu/> under Employee Relations.

Elements of a Termination Letter

1. Inform the employee s/he is being terminated, effective when and why.
2. Specify when s/he received warning(s) for that/those failure(s)/violation(s).
3. Conclude with,
Your final check will include payment for any unused hours of vacation leave up to a maximum of 240 hours that you have accrued. You may contact (name), Benefits Specialist, name, at (phone number) to discuss your benefits options.

When applicable and employee is leaving the workplace immediately or receiving the termination letter at home:

You may contact me at phone number to arrange a time to return your keys/equipment/etc. and collect any personal items left in your workplace.

Optional for cases of inability:

Employee name, this has not been an easy decision and I sincerely wish you success in finding another position that will be a better match for your skills.

4. Signature and date lines for the employee to sign.

Sample: Termination Letter

Department Header

Date

Employee name & home/office address

Mr/Ms XXX,

- (attendance) Your employment with Emory University is terminated effective date, due to your repeated tardiness and absences. This was discussed with you repeatedly over the last six months and most recently you received a written warning on date. In that warning I reminded you of our policies and departmental rules regarding attendance.
- (performance) Your employment with Emory University is terminated effective date, due to repeated failure to perform. When you were hired into your current position, you were provided the Job Description. During your orientation, the duties you would be expected to perform were explained to you. Since then you have been provided periodic training as well as additional instruction at your request. However, there have been continued deficiencies in your performance and failure to follow directives. This was discussed with you numerous times and the Performance Improvement Plan provided to you on date has not resulted in improvement. *(for inability, see example below)*
- (communication/behavior) Your employment with Emory University is terminated effective date, due to your inappropriate behavior and communication. As was discussed with you numerous times in meetings and a written warning on date, loud, disrespectful and crude language in the workplace, particularly in public spaces in front of students and customers, is unacceptable. You were warned that another such incident could result in termination yet, you exhibited this behavior again today in the department entryway.
- (policy violation) Your employment with Emory University is terminated effective date, due to repeated failure to notify your supervisor adequately in advance of a planned absence. I have reviewed with you the leave request procedure for this department several times and provided you a written warning on date. However, on date you told your supervisor that you would not be at work the next day due to an appointment, providing less than 24 hours notice. You were told that you could not be absent because schedules could not be adjusted at such late notice. However, you failed to report to work the next day. This is a violation of both the Vacation Leave Policy, 4.100 and the Standards of Conduct Policy, 4.62 and you are not eligible for rehire.

Your final check will include payment for any unused hours of vacation leave to a maximum of 240 hours that you have accrued. You may contact (name), Benefits Specialist, name, at (phone number) to discuss your benefits options.

Sincerely,

Supervisor

By my signature below, I hereby acknowledge that I received a copy of this notice of discipline. My signature does not necessarily indicate agreement with the contents.

Employee Name

Date

cc.: xxxxxxx
 xxxxxxx