



**CITY OF MARSHFIELD, WISCONSIN
POLICIES AND PROCEDURES**

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CHAPTER: General Purpose and Objectives

SUBJECT: Personnel Records and Reports

POLICY NUMBER: 3.020

PAGES: 3

EFFECTIVE DATE: April 24, 1990

REVISION DATE: January 1, 2012

DEPARTMENT OF PRIMARY RESPONSIBILITY: City Administrator's Office

Special Notes: This policy/procedure manual does not in any way constitute an employment contract and the City of Marshfield reserves the right to amend this manual at any time subject only to approval by the Common Council.

PURPOSE:

The purposes of this policy are 1) to minimally define the personnel records and reports that are to be maintained by the City Administrator's Office; and 2) ensure that information about employees in the organization's personnel files is accurate, relevant, and safe from improper disclosure.

POLICY:

The City Administrator shall prescribe all personnel forms which hiring authorities will use to maintain proper employee records and to report all personnel actions and status changes.

The City Administrator shall prepare and maintain a record of all authorized City positions showing the position numbers, position titles, position status (filled, vacant) and the incumbent employees' names. From this data, a written report titled the "Position Control Status Report" will be provided to the Finance, Budget, and Personnel Committee on a monthly basis.

Necessary job-related and personal information about each employee will be retained in an Official Personnel File kept by the City of Marshfield. The contents of each file will include: basic identifying information (e.g. employee's name, address, and position title); completed employment applications or other hiring-related documents; notices of pay changes; information on benefit coverage; performance evaluations and information on other employment-related actions (e.g. promotions, training, disciplinary action, termination documents); medical forms and injury reports; and other job-related information deemed essential by management. Essential records of current and former employees will be retained indefinitely.

Current and former employees have the right to inspect and copy the information in their files. Individuals will be given access to their files only in the presence of a management official, and at a mutually convenient time during normal office hours. An employee desiring to inspect his/her personnel file shall make written application to the City Administrator's Office. An employee making such application will be notified of an appointment to inspect his/her file, with such appointment occurring within seven (7) work days of receipt of the request. An employee may inspect his/her personnel file two (2) times in any calendar year, unless the right to review is otherwise governed by the terms of a collective bargaining agreement.

The City of Marshfield reserves the right to withhold from inspection certain sensitive information, including third-party references; confidential management documents or plans; test documents, except cumulative total test scores; personal information about persons other than the employee, the disclosure of which would constitute a clearly unwarranted invasion of privacy; and information on security or criminal investigations, except when such restrictions are prohibited by law.

An employee involved in a current grievance against the employer may designate, in writing, the name of a representative to inspect those items in the personnel file that may have a bearing on the outcome of the grievance.

Internal access to a personnel file is limited to supervisors and managers who are considering the employee for promotion, transfer, or other personnel action, and to other management officials who have a legitimate, verifiable need to know specific information about the employee.

No personnel information will be disclosed to any party outside the organization unless the current or former employee provides a signed consent to release the information or such disclosure is required by applicable state statutes. The employer reserves the right to verify basic information (e.g. employment status or position title) without notifying the individual involved, and to cooperate with law enforcement, public safety, or medical officials who demonstrate a legitimate need to know specific information.

Employees who question the accuracy or completeness of information in their files should discuss their concerns with management. The employer will consider any

employee's objections and remove erroneous or improper information. Should disputed information be retained in the file, the employee may submit a brief written statement identifying the alleged errors or inaccuracies. The statement will remain in the file as long as the disputed information is retained.