

**SAN BERNARDINO COUNTY
PROBATION DEPARTMENT PROCEDURE**

Inter-Bureau Procedure #99-07-75 Supervisor's Employee Desk Files

Authority: Raymond B. Wingerd, Chief Probation Officer

Supervisors shall maintain a working desk employee file for all employees under their supervision. The purpose of the file is to maintain information, which will assist in the effective supervision of employees.

The file may contain copies of information contained in the employee's general personnel file. The Supervisors Employee Desk file may include material written by the supervisor such as *Memos of Conference* and *Letters of Instruction*, the most recent work performance evaluations, ~~corrective action memorandums~~, work improvement plans, and memos or notes regarding positive events that have occurred since the employee came under his/her supervision. Only medical information related to work restrictions, work accommodations, or medication(s), which may effect the employees work performance are to be retained in this file.

Additionally, information notes or material on pending actions such as attendance records, or information documenting work performance may be retained in this file.

The supervisor's employee desk file is a personnel file. It may be viewed by the employee upon request (Administrative Services Bureau Procedure #98-05-32), and may be discoverable in legal administrative proceedings.

Upon transfer of the supervisor or employee, a summary of the contents of the employee desk personnel file should be put in a "Summary Memo" for use by the new supervisor and the documents contained within that file shall be destroyed and the summary memo sent to the employee's department personnel file.

Issued by: _____
P. Joseph Lenz, Deputy Chief Probation Officer

Date: July 26, 1999

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July 5, 2001

Policy Reference(s): 2 & 3