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|  |  | **Blue Ridge Fire District**  **Policy and Procedure** | | |  | General Order Number  **E303** | |  |
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|  | Subject:  **Personnel Records** | | | Effective Date:  **April 1, 2015** | | | Total Pages:  **3** |  |
| Board Approval Date:  **March 21, 2015** | | | Rescinds: |  |
|  | Application:  **All District Personnel** | | *Signed into effect as authorized by the Board of Directors*  John Banning, Fire Chief | | | | |  |
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1. **PURPOSE**

To establish standards by which information contained in personnel records shall be managed to achieve accuracy, privacy, and legal compliance.

1. **SCOPE**

This policy applies to all employees of the District.

1. **POLICY**

It is the policy of the District to maintain all employee files according to all Federal and State record keeping requirements, as well as the following guidelines.

1. **GUIDELINES**
2. **Changes** – All changes of address, telephone number, family status (i.e., birth, adoption, marriage, death, divorce, and legal separation) shall be reported to the Administration Office within one week. An employee’s income tax status may be affected by these changes.
3. **Personnel File Access** – Access to personnel files shall be restricted to the Fire Chief or his designated representative. District Board members access will be limited to the same rights as the public.
4. **Information Requests and Employment References** – Requests for information from one employee files received from outside the District, including request for references on former employees, shall be directed to the Fire Chief or a designated representative.

Note: Supervisors and other employees may provide letters of references for current or former employees. However, the Fire Chief or his designated representative shall approve all letters that are signed as representative of the Blue Ridge Fire District prior to distribution.

1. **PROCEDURE**
2. **Telephone Inquiries** – Information shall be verified by the Supervisor or the Fire Chief via telephone, but shall be limited to the following:

* Date of hire
* Date of termination
* Most recent position held

Note: No other person is authorized to provide information via a telephone inquiry, unless previously authorized by the Fire Chief.

1. **Written Inquires** – If the request for information is in writing and signed by the employee or former employee, salary information may be verified in addition to the items set forth in Guideline V above. This verification shall be in writing from the Fire Chief. A copy shall be retained in the employee’s personnel file.
2. **Reference with Written Approval** – With written approval from the current or former employee, salary, job chronology, and performance information may be released in writing only. This may be explained to separating employees in the exit interview.
3. **Examination of an Employee File** – Inspection of an employee’s personnel file may be accomplished at reasonable times during office hours under the following conditions:
4. **Employee** – Upon request by an employee and in the presence of the Fire Chief or designee, the employee may inspect the personnel file. Employees have the right to obtain copies of any documents in the file that are signed by the employee as a condition of initial or continued employment.
5. **Government Inquires** – The District shall cooperate with Federal, State and local governmental agencies investigating an employee if the investigators furnish proper identification and proof of legal authority to investigate. The investigation shall be permitted on the District premises, but the investigator shall not be allowed to remove or reproduce this information without consent from the Fire Chief and the District’s legal counsel.
6. **File Retention** – The permanent or “central” file containing all employee information shall be maintained in the Administration Office. Originals of personnel records shall be maintained for a period of five years after an employee’s separation date. Supervisors may maintain a “local” file with information relating to performance, emergency contact, certifications, etc. This file may be transferred to the new supervisor in the event of an employee transfer. See documentation removal from employee files for additional timelines.
7. **Medical Files** – All medical files shall be maintained separate from the employee personnel files.
8. **Content** – Medical files shall contain any information related to one’s medical or physical condition including but not limited to such items as: physical condition including but not limited to such items as: Physical Examination results, PSPRS Medical Review, Workers’ Compensation reports, Drug Screen results, and Hazardous Material Exposure reports.
9. **Access** – Access to the medical files shall be restricted to the Fire Chief or designee.
10. **Release of Information –** Medical information shall be released only upon written authorization of the employee or upon proper request from other persons or agencies that have legal rights to the information.
11. **Reports to the District**

Every appointment, transfer, promotion, demotion, dismissal or other change in the status of employees in both the classified and exempt services will be reported to the Fire Chief, in writing, utilizing the personnel action form.

1. The District will provide adequate forms for making any written report, which may be generally stipulated in any of these policies and procedures. If no form exist a written memo or letter may be substituted.
2. Completion of training schools, professional, technical courses and other like training will be noted, certified, and inserted in the personnel folder of each employee of the District.
3. Personnel folders will be utilized by the Chief in making assignments, reassignments, transfers, promotions, demotions, dismissals, or other personnel actions.