



advantage



IN THIS ISSUE

HR Records Management: Foundations.....	2
Employee Recognition.....	3
Salary Surveys Are A Must!.....	5
OFCCP Contractor Registration Deadline	6
Feds Are Out Front.....	7

IN EVERY ISSUE

Employee Spotlight.....	8
HR Links	8
Whatever the Question	9
HR by the Numbers	10
Thoughts to Think About.....	11
Events Calendar	12
On My Soapbox	15

HR Records Management: Foundations

Anna Lee, SHRM-SCP, IPMA-SCP

Using best business practices to ensure your human resources records are organized and properly retained is part of the foundation for a well-managed organization. Employee records are a vital part of tracking the life cycle of an employee, when were they hired, what position/ positions they have held, what is their compensation and additional benefits they received. Documentation and correct records management will provide you, the employer, a basis for your employee/employer relationship. Here are key factors to establish an effective records management system, compliant with all of the state and federal guidelines.

Below are a few considerations to get you started.

What should be documented? Create Templates or Forms.

- Anything that needs to be consistently managed.
- Anything that will be needed for future processes.
- Anything required by state or federal law, including those things that can be challenged in the future.

User experience

- Who will initiate the use of a document?
- Who will review/approve?
- Where will it be stored?
- How long will it be stored?

Don't forget all of this information does not get stored in the same file and, in most cases, the access will be different depending on the contents.

Each employee should have at least three separate files.
These are:

Employee Personnel File

This is the main personnel file an employer maintains for each employee. The personnel file stores the employment history of each employee and does not store medical (including benefits) or payroll information. The contents of this file are typically available to employees through supervised review, electronic security access, or a full copy reproduction.



Medical File

This is the file where you will store all information and processes related to medical conditions (mental or physical) such as Family and Medical Leave, Americans with Disabilities Act, and additional leaves or benefits provided based on medical status. This file will contain all documentation about process gone through to arrive at benefit eligibility and tracking. This file is typically only accessible by the employer's designated administrator(s) and is not accessible to the employee or supervisor. It is important to understand this is the employer's record of medical related events and may be compelled during a claim against the employer.

Payroll File

Employee access to the employee payroll file is less restrictive than access to either the medical or the personnel file. The payroll file holds information about salary, benefits selection, pay rate changes, garnishments, and other legal documentation that affects an employee's paycheck. Various accounting and Human Resources staff access the information in the payroll file. Employees may have access to this through an electronic portal(s).



In addition, each organization will want to maintain an I-9 Forms File for all employees. This is because of the access rights of various government agencies to review these forms. It would be difficult to maintain the organization's confidentiality/security requirements of the other employee information if these forms are stored elsewhere.

For more information on HR Records Management, please visit our website at: www.hranswers.com

We offer online workshops that are interactive and provide a great way to bring all of these steps in creating an HR Records Management System that will enhance your organization. We look forward to seeing you soon!

Employee Recognition

In today's workforce, recognizing employee behavior is a critical component of an organizations culture, productivity, and employee engagement. Appreciation goes beyond feeling good! When employees are happy, organizations see a 37% increase in sales, 31% jump in productivity, and a 19% hike in accuracy (Gallop). The three main drivers of happy employees include: strong sense of community, recognition and appreciation, and positive relationships with their managers.

So how do you recognize your employees? Let us count the ways:

- Employees nominate peers for award(s)
- Listen to your staff with surveys and take action
- Recognize effort not just results
- Offer a surprise day off
- Invite employees to represent you at events
- Give employees a stretch project
- Involve everyone in long term planning
- Make a charitable donation in their name
- Celebrate Employee Appreciation Day on March 4th
- Share a virtual meal or have a coffee mug competition
- Update team headshots
- End of the week superlatives
- Use your current communication tools or organization chat for celebrations or some form of public recognition
- Send thank you cards with meaningful words and specific recognition (you can use these ideas):



May you be proud of the work you do the person you are and the difference you make.

Thank you for being an essential part of our team. Happy Employee Appreciation Day!

A great employee is like a four-leaf clover, hard to find and lucky to have.

Because of you... We're moving in the right direction, THANK YOU SO MUCH! for your hard work and dedication. It's greatly appreciated.

We appreciate your hard work, thank you! - you are an important part of the team!

Your excellence drives our success! THANK YOU

- Highlight employees on your social media - craft your post to show your gratitude! Then hop onto Twitter, Facebook, LinkedIn, Instagram, or the platform of your choice to share your appreciation for your teammates using one of these meaningful hashtags.



#employeeappreciationday
 #yourock
 #teamworkmakesthedreamwork
 #gratefulforyou
 #younailedit
 #thanks
 #workhero
 #youearnedit

Reminder: Don't post photos of your coworkers or tag them without permission. Generally, make sure everyone is comfortable with whatever you share on social media — it's good digital etiquette and there are some laws about this.

Salary Surveys Are A Must

Laurie Grenya, SPHR

Your organization's employees are its greatest asset. How do we know? Because most of your revenue is spent on employees. Organizations spend between 65 and 85 percent of gross revenues on employee salaries and benefits combined. Knowing if you are paying too little or too much is imperative to fiscally appropriate decision making about pay and benefits. So, how do you know if you've got it right? Analyzing the comparable through use of third-party surveys or outside assistance is the first step.

Three Keys to Success

Using Good Data - Salary surveys published by objective third parties will include a list of participating companies, survey job summaries, and methodology without charge. Data published should include "total" compensation, retirement plan information, bonuses, incentives, and base salary. A good survey may also include additional discretionary benefits such as Paid Time Off, vacation, and insurances. A comprehensive data set ensures a thorough understanding of pay and other trends.

Correlation of Information – Salary Survey data is not enough. It must be correlated with the compensation philosophy and pay practices of your organization. There is no rule or law that

dictates how the market should be measured. Each organization must make this choice. Do you want to lead, lag, or meet the market? Why? How frequently will you measure the market? How will changes be implemented? These are all questions best answered in the organization's pay philosophy and practice policies and no two organization are exactly alike. So, please don't copy something from the internet. This task requires discussion, drafting, and thinking through the impacts.

Communication of Results – Management staff within an organization should be trained, assigned, and held accountable to explaining and supporting the organization's pay philosophy and policy, and not only when it will create smiles. As the economics change over time each organization will react and sometimes in ways that lead to difficult conversations.

If you would like to hear more about this topic join us on [May 18th for Compensation Fundamentals: Part I](#) or June 16th for Compensation Fundamentals: Part II. Better yet, join us for both!

Complete Registration for OFCCP Contractor Portal By March 30, 2022

The Office of Federal Contract Compliance Programs (OFCCP) urges covered federal contractors to register for OFCCP's Contractor Portal. Covered federal contractors and subcontractors must use this portal to certify, on an annual basis, whether they have developed and maintained an affirmative action program (AAP) for each establishment and/or functional unit, as applicable.

Registration for the Contractor Portal began February 1, 2022. We strongly encourage you to complete registration by March 30, 2022, to avoid any delays with certification.

Registered users will be able to begin certifying their compliance on March 31, 2022, and existing contractors must complete certification by June 30, 2022. New contractors have 120 days to develop their AAP(s) and must register and certify compliance through the Contractor Portal within 90 days of developing their AAP(s).

Registration Resources:

- [User Guide](#)
- [Updated Frequently Asked Questions](#)

Please visit the [Contractor Portal Landing Page](#) and contact the [Contractor Portal Technical Help Desk](#) with any questions.



Feds Are Out Front

The federal government is leading the way on employing a diverse and older workforce. The U.S. Equal Employment Opportunity Commission (EEOC) recently issued a report on workers aged 40 and over in the federal workforce with details regarding pay disparities, the proportion of older workers on staff, complaints of age discrimination, and how this group compares to workers in the private sector.

The report by the EEOC's Office of Federal Operations found the federal government – the nation's largest employer with about two million workers – generally outperforms the private sector in diversity for this cohort of workers. For example, employees 40 and over had greater representation in the federal sector (72%) than in the non-federal civilian labor force (CLF) (54%) and was more diverse -- most race and national origin groups were represented in the federal government at rates equal to or greater than the CLF.

Researchers found disparities in aspects of the federal workforce 40 and over: men were a greater percentage than women and pay gaps existed between women and men and among different race and national origin groups. Also, the report found federal employees in this cohort on average earned more as they aged, with earnings peaking at the 65, suggesting labor is not undervalued with age.



“It’s an established fact of life that more older Americans are working longer, and in larger numbers than ever before,” said Dexter Brooks, associate director of the EEOC’s Office of Federal Operations. “The fact that more mature workers are contributing their experience and talents to their employers is good for the country. It also means the EEOC must continue to be vigilant in protecting their rights, and it behooves us to track and analyze of the situation of older employees in every sector to see what lessons may be learned.”

The study supports President Biden’s [Executive Order on Diversity, Equity, Inclusion, and Accessibility in the Federal Workforce](#), which calls for the federal workforce to be a model employer. The order includes “individuals who belong to communities that may face employment barriers based on older age” as a potentially underserved group needing attention.

For more information on age discrimination, the federal website can be helpful. It is located at <https://www.eeoc.gov/age-discrimination>.



employee spotlight

Rachelle H.

“If you’ve ever heard someone ask me what my favorite part of my work is, you’d hear this: It’s the work, the company, the people, and the clients. I absolutely believe in the work we do, and providing this kind of service to the various types of organizations we serve is a privilege. I believe it takes us all to be successful, and I’m happy to pitch in where I’m needed.”



Operations Specialist

WHERE YOU CAN FIND ME AT HRA

- Accounting
- Advantage Plan Program
- Marketing, Social Media, and Website
- Data and Information Management

FUN FACTS ABOUT RACHELLE

She spent seven years studying American Sign Language prior to graduating from high school. She has had four different roles with HRA since joining the organization in 2017.



hr links

If your organization is looking to revamp your performance management system, you want to analyze your current program and are looking for some guidance on creating a new effective performance management program, we thought some of these resources might be helpful for you - feel free to check them out. Of course, you can always reach out to us for assistance too – we’d be more than happy to help you.

1. *Performance management guidebook:* docsend.com/view/mi7668s3frmwszw2
2. *100+ review questions:* docsend.com/view/ynyzguwzh3kiv2my
3. *Designing performance management - panel discussion at the Hacking HR conference:* www.youtube.com/watch?v=zXX6E7BlIRs
4. *Giving 2x better feedback:* open.spotify.com/episode/7e63HVfYeVfKOdw9YUaI6b



whatever the question

Best Advice You Have Been Given

In a recent issue of HR Magazine, they asked HR professionals to share the most meaningful advice they had ever been given and how it changed the way they did their jobs.

We like this question and want to extend it to each of you and hear how you would answer the question. But before you give us your answer, here's the short version of what was in the article.

- Stand up to bullies
- Study the business
- Welcome feedback from others
- Consider others' perspectives
- Lend a helping hand
- Find a champion
- Maintain your morals
- Always be prepared
- Be honest
- Search for inspiration

Now let's hear from you. Send us your answers at info@hranswers.com and use the subject line "best advice given".

Is there a question you would like us to answer?

Email the question to info@hranswers.com and include the subject "newsletter question". We will publish the answer in our next issue.



hr by the numbers

How employee experience affects customer service:

- 64% of 1003 US workers surveyed believe employee experience directly impacts their ability to serve customers.
- 70% said their feelings about their day-to-day work experience negatively or positively impacts their productivity.
- 38% reported their organizations place a great deal of importance on employee experience and satisfaction.

If customer service is a topic, and you would like some of your staff members to learn more about or focus on we have a webinar next month on April 28th. [Register here](#).



Kazoohr reports:

- 60% of employees agree if given a choice between similar jobs, the option with stronger professional development wins – even against higher pay.
- 45% of employees report more training would make them more willing to remain in their current roles.
- When organizations have strong internal mobility, their employees stay [2X longer](#).



According to Gallop, workers who have weekly performance chats with their managers are:

- **5.2x** more likely to strongly agree they receive meaningful feedback
- **3.2x** more likely to strongly agree they are motivated to do outstanding work
- **2.7x** more likely to be engaged at work
- **81%** of employees report working harder when their manager recognizes them
- **50%** of workers would stay in their jobs longer if they were recognized more often
- **82%** of employees say they're happier when they're recognized at work



Ethics. With employees working remotely and not observed as they might otherwise would be - is it having an impact on conduct in your organization?

- In 2020, 30% of 3,320 U.S. employees surveyed said they felt pressured to compromise their workplace's ethics, according to the [2021 Global Business Ethics Survey Report](#) by the Ethics & Compliance Initiative. That was 14 percentage points higher than in the organization's 2017 survey.

- More than half of top managers and almost 65% of middle managers said they felt pressured to compromise their organization's ethics, compared with just 12% of non-management employees
- Almost half of employees surveyed last year said they observed misconduct that violated their organization's ethics standards; 86 percent of them said they reported all or some of that behavior, up 17 percentage points from 2017.
- Retaliation has reached an all-time high, with almost 80% of respondents saying they experienced retaliation for reporting wrongdoing, up from 44% in 2017. Middle and top managers were far more likely than non-managers to say they experienced retaliation after reporting bad behavior.



thoughts to think about

"Appreciative words are the most powerful force for good on earth." ~George W. Crane

*"Opportunities are usually disguised by hard work, so most people don't recognize them."
~Ann Landers*

*"I am only one; but still I am one. I cannot do everything, but still I can do something."
~Helen Keller*

"You can't give what you don't have." ~Nataly Kogan

"You cannot escape the responsibility of tomorrow by evading it today." ~Abraham Lincoln

"There is little difference in people, but that little difference makes a big difference. The little difference is attitude. The big difference is whether it is positive or negative."

~W. Clement Stone

"Reflect upon your present blessings, of which every man has plenty; not on your past misfortunes, of which all have some. Charles Dickinson You cannot always control circumstances, but you can control your own thoughts." ~Charles E. Popplestone

calendar of events



02 Lunch Bunch: Managing Change



02 Technical Skills: HR Records Management

04 Employee Appreciation Day!

04 Supervisory Short: Emotional Intelligence



08 Technical Skills: Employee Leaves: Protected, Discretionary, Paid or Unpaid



10 Succession Planning: Retirements/Turnover—Are You Ready?

16 Ideas for Creating a Happy Workplace



17 Mental Health: Impact on Your Workplace

31 Soft Skills: Developing Your Influence



Collaborative Conversations
designed for people focused business leaders

FREE
Three-part series!

Self-Care for HR (well really anyone) *March 9th*

The Workplace Has Changed. Have Your Mental Health Benefits Kept Up? *April 6th*

Creating A Workplace Culture That Values Mental Health *May 25th*

[LEARN MORE](#)

calendar of events



- 01** Supervisory Short: Setting Expectations
-  **05** Technical Skills: Coaching Employees
- 06** HR Lunch Bunch: Coping with Interpersonal Conflict
-  **14** Creating a Culture of Belonging
-  **14** Auditing Oregon Pay Equity
-  **19** Prevent Employees from Becoming Plaintiffs
- 20** Foundations of Leadership
- 21** Workplace Violence
- 27** Mindfulness
- 27** Technical Skills: Performance Management
- 28** Soft Skills: Customer Service

Supervisory Success Series

Registration Now Open for
Fall Series | Begins August 25th

[REGISTER](#)

**GET YOUR
SPOT TODAY**



calendar of events



- 03** Interviewing for Culture
- 04** HR Lunch Bunch: Imagine Belonging at Work
- 05** Technical Skills: Corrective Action
- 06** Supervisory Short: Managing Change
- 17** Managing Remotely
- 18** Technical Skills: Compensation Fundamentals I: Market Analysis and Salary Surveys
- 19** Soft Skills: Communication

[REGISTER](#)

Visit our website for a list of upcoming conferences and events where you can see us!

[SEE MORE](#)



on my soapbox



For those of you who have been reading this for some time, you will know how much it means to me to say, “I finally got a surgery date to have my second hip replaced.” I am not sure there has been a person who was more excited to go to the hospital and have surgery. This operation was originally scheduled for November 2020, so I have been waiting for many months. The wait has taught me so much. I have had many lessons on patience, but this was a biggie. The wait was compounded by Covid because the hospital wasn’t taking any “elective surgeries.” We could have had a big and likely a heated discussion about how elective my surgery was since it has kept me from walking for five years. I have discovered walking, at least for me, is an “essential function.” For these five+ years I have been confined to a wheelchair so for me, this was essential surgery, not elective. But my ranting and raving wouldn’t have changed a thing so I just decided that I would wait until there wasn’t any other hurdle. That time has come thankfully!

In addition to patience, I have learned some new skills. I now know how to operate a picker-upper. And I have some suggestions for the folks that manufacture them. They ought to come in different lengths because the people who use them are of different heights. And they need to be able to pick something up from under something else. Because almost all things that are dropped find a home under a piece of furniture or a cabinet, or they roll under a bed. The picker-uppers are a big help but they are not the answer to everything. Having a broom with a long handle or some other similar tool is needed for the items that roll under the bed or something similar. I have also had to learn how to navigate in a wheelchair which requires some adroit maneuvering around furniture, walls, and things that a walking person would never crash into. I am sure that my kids don’t understand why I continue to collide with my shoe rack necessitating putting it back together and stacking up the shoes. I know why it happens, and honestly, I try to avoid it at the bottom of the bed. But somehow my chair catches the comforter, and that pulls on the shoe rack, which then collapses gushing shoes in every direction. Obviously, I still need to learn how to navigate my chair. Hopefully, I will have no time to learn that given that surgery is only two weeks away. What I will be concentrating on learning is how to walk again.

If you can’t walk, you must make do with asking people to assist you with some little tasks and some big ones. I already knew that I didn’t like asking others to help me. So, this was a harder lesson for me to learn. I still haven’t learned it all but have had no other choice to ask. My asking is wishy-washy. I stumble over the words, and I hear the change in the tone of my voice when I am asking for help. I sound much more like a little girl than an adult. I think that is because I am asking for help and a little girl would do that, but adults (in my mind) would do it for themselves. Psychoanalyzing oneself is a risky business because if you can figure out why you do something, then you must do something about it. I am still working on that, but I have learned that most people will assist you if it is something they can do and if your ask is not too hard. I appreciate people who ask me if there is some way they can help if they see me struggling. I have learned how to let others help me which was a big deal!! I still am uncomfortable with that,

but I don't think I show it and I am often relieved that someone else can do something that I am just not able to do.

I have learned a lot about peoples' understanding about dealing with people who are disabled. I have been in conversation with someone who bends down to talk with so that our heads are on the same level which makes for a better conversation. I have talked with folks who say, "Just a minute...let me get a chair." This also works well for a feeling of mutuality for both of us. I have experienced the person saying "hello" and then scanning the room for someone to talk with that is their full height. Because I am lower, I am not worth a conversation (at least that is how it feels). I have learned how to deal with that and tell myself "They don't know me well enough for me to take this personally. So, it is not about me; it is about their lack of sensitivity to people who are disabled." Once I learned that mental thought, I was much less offended or hurt by their actions.

And mostly, I have learned what it is like to be disabled. What challenges are there? How do I get a file out of the top drawer of a four-door filing cabinet? How do I put dishes away on the top self? How do I carry things when one hand must operate the wheelchair? And so many more... Since I can't bend over to pick things up, how do I pick up the things that are too heavy for the picker-upper? How do I get a package on my porch into the house? And maybe the best way to describe it is, how do I do all the things in everyday life in a world that was made for people who are five feet or taller? I will carry that learning with me after surgery. I will learn how to walk again, but I won't be the same person I was, because I have "walked" in the shoes of people who are disabled. I learned how much it means to someone on crutches, someone in a wheelchair, someone to struggles to speak, or someone who is deaf if someone demonstrates that it doesn't minimize their value and is sensitive to how best to interact with them.

The things I have learned couldn't be learned any other way. You could tell me what it is like, but that can't be substituted for experiencing a disability. In many ways I am appreciative of the opportunity to learn these things. But I am also anxious to have surgery so I can learn to walk again. I will carry my new lessons with me and hope to be a more sensitive person.

Judy Clark, Principal and Founder

To see more of Judy's writing and read the history of HRA Answers, [visit our website](#).

Editor: Deborah Jeffries, SHRM-CP, PHR, CPC: **Advantage** is published monthly and is designed to provide information on regulations, HR practices, and management ideas and concerns. The intended audience is managers, supervisors, business owners, human resources professionals and labor relations professionals. If you have questions about the content, an opinion about the information, or questions about your subscription, please call us at 503-885-9815 or email us at info@hranswers.com

Information and advice offered through **Advantage** should not be construed as legal opinion. The material contained herein will not apply to all circumstances or to all organizations. Use it as a resource and reference. Should you feel legal advice is required, please consult with your legal counsel.