**Manager Summary Report**

**Instructions: Fill out the information below to establish the rationale for your recommended next steps related to a performance or conduct issue(s) with an employee. This summary will be reviewed by your ELR Senior Representative to assist you with determining potential next steps in corrective action.**

**Date(s) of incident(s)/issue(s):**

**Date(s) you become aware of the incident(s)/issue(s):**

**Date(s) you began reviewing the incident(s)/issue(s):**

**Date(s) you concluded your review of the incident(s)/issue(s):**

**Employee’s name:**  **Employee title:**

**Employee department:** **Employee date of hire:**

1. **Describe the issue(s). Include details such as witness names, descriptions of incident(s), location, specific date(s)/times of incident(s):**

|  |
| --- |
|  |

1. **Please describe any evidence that exists which proves and/or disproves the issue(s)? This may include items such as written documentation (including e-mail) or video/audio recordings:**

|  |
| --- |
|  |

1. **What date(s) did you speak with the employee about the issue(s)? Share their response below.**

|  |
| --- |
|  |

1. **Describe the impact this/these issue(s) had on the department or other employees/individuals?**

|  |
| --- |
|  |

1. **Outline the policies/procedures/laws violated and/or that apply to this/these issue(s). Attach the policy/procedure and appropriate corresponding policy acknowledgement forms/handbooks.**

|  |
| --- |
|  |

1. **Provide the date(s)/time(s) of prior notice, coaching, or warning(s) the employee received regarding the issue(s).**

|  |
| --- |
|  |

1. **Do you recommend proceeding with corrective action? Y/N**

**Manager Name:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ **Date:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Manager Signature:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_