Progressive Discipline Checklist Template

Follow these steps in exercising progressive discipline with an employee:

Before the Meeting

- [ ] Arrange to meet with the employee privately. Do not discipline an employee in public or in front of other workers.
- [ ] Review your notes and files about the specific incident or problem and any past discipline taken, either verbal or written.

During the Meeting

- [ ] Explain why you've called the meeting if the employee doesn't know already.
- [ ] State the problem in terms of actual performance and desired performance.
- [ ] Review your progressive discipline policy/program with the employee, and explain what steps have been taken already and what the next step is.
- [ ] Give the employee a chance to respond, explain and defend his or her actions.
- [ ] Acknowledge the employee's story and include it in your notes of the session.
- [ ] Tell the employee that you expect his or her behaviour to change. Give specific examples and suggestions.
- [ ] Indicate your confidence in the employee's ability and willingness to change the behaviour.
- [ ] Have the employee repeat back to you or otherwise confirm that he or she understands the problem and is clear on what changes are expected.
- [ ] Explain to the employee that you will write a memo summarising the session as documentation.
- [ ] Reassure the employee that you value his or her work and that you want to work with the employee to make sure that he or she can continue to work at HiFlex Physio.

After the Meeting

- [ ] Using your notes from the session, write a summary of the conversation.
- [ ] If a written warning has been issued, be sure to give the employee the opportunity to sign any documentation for the file.
- [ ] Give the employee a copy of the document no later than the end of the day following the conversation.
- [ ] Monitor the employee’s behaviour and performance to make sure that the problem has been corrected.