

## What's Required In A Blue Folder

Employee File Contents (link to [http://www.med.umich.edu/umhshr/doc/Emp\\_File\\_Contents\\_0308.pdf](http://www.med.umich.edu/umhshr/doc/Emp_File_Contents_0308.pdf) )

Front Label – The Blue Folder requires a label on the front which includes the Employee Name, their University Date of Hire, their current Job Title and their current Job Code

Front Label Template (link to

[http://www.med.umich.edu/umhshr/doc/Blue\\_Folder\\_Front\\_Label\\_Template.doc](http://www.med.umich.edu/umhshr/doc/Blue_Folder_Front_Label_Template.doc) )

Job Description – Job descriptions must be current, accurately reflect the duties of the position and match the performance evaluation. Patient care descriptions must include the population(s) served. The description can be one inclusive document or a combination of the following:

- University Classification Descriptions
  - Non-Nursing Patient Care Services Career Family Job Descriptions (link to: [http://www.med.umich.edu/umhshr/Job%20Descriptions/Pt\\_Care\\_Svcs\\_Job\\_Descriptions.pdf](http://www.med.umich.edu/umhshr/Job%20Descriptions/Pt_Care_Svcs_Job_Descriptions.pdf) )
  - IUOE, Nursing POAM, Trades and Temporary Career Family Job Classification Descriptions (link to: <http://www.hr.umich.edu/complclass/descriptions/index.html> )
- Career Navigator Description (link to <http://careernavigator.umjobs.org/> )
- Departmental job specific description
- Description of tasks, duties and responsibilities

Additional Resources:

Developing a Position Description (link to

<http://www.hr.umich.edu/empserv/department/empse1/devpd.html#write> 0

License/Certification/Registration – There are two types of documentation which may be maintained under this tab – PSV and non-PSV.

Non-PSV documentation is evidenced when a license, certificate or registration is required to perform a non-patient care job. The blue folder should hold either the actual license, certificate or registration or the template indicating that it can be found in MLearning .

PSV documentation is evidenced for certain patient care jobs which The Joint Commission requires the license, certificate or registration to be verified with institution that issued it. All jobs requiring verification from the primary source are listed on the PSV Matrix (link to <http://www.med.umich.edu/umhshr/doc/PSV%20Matrix.xls> ). PSV credentials may be verified by printing documentation from the primary source's web site or by phoning them and completing the Telephone Verification Form.

PSV Matrix (link to <http://www.med.umich.edu/umhshr/doc/PSV%20Matrix.xls> )

PSV Telephone Verification Form (link to <http://www.med.umich.edu/umhshr/doc/telephone-verification-form.pdf> )

Mlearning non-PSV Lic/Cert/Reg Template (link to

[http://www.med.umich.edu/umhshr/doc/MLearn\\_Non\\_PSV\\_Lic\\_Cert\\_Reg\\_Template.doc](http://www.med.umich.edu/umhshr/doc/MLearn_Non_PSV_Lic_Cert_Reg_Template.doc) )

Licensure Policy (link to <http://www.med.umich.edu/i/policies/umh/04-06-040.htm> )

Orientation Documentation – All staff hired after 1/1/1993 must have an orientation document in their blue folder. Documents may be either the institutional orientation checklist or a departmental checklist. An orientation documentation waiver, a document indicating a hire date prior to 1/1/1993, is an acceptable replacement to orientation documents.

Orientation Checklist (link to [http://www.med.umich.edu/umhshr/doc/Orientation\\_Checklist.pdf](http://www.med.umich.edu/umhshr/doc/Orientation_Checklist.pdf))

Orientation Documentation Waiver Template (link to

[http://www.med.umich.edu/umhshr/doc/Orient\\_Waiver\\_Template\\_DOH%20Prior\\_to\\_1993.doc](http://www.med.umich.edu/umhshr/doc/Orient_Waiver_Template_DOH%20Prior_to_1993.doc))

Performance Evaluation & Improvement Plans – all UMHS employees must have a performance evaluation annually. Evaluations must match the job description and include job specific expectations and a development plan. The last 3 years of the employee's evaluation documents are kept in the blue folder.

Staff Evaluation Form (link to <http://www.med.umich.edu/umhshr/doc/staff-perform-eval-form.doc> )

Leadership Evaluation Form (link to [http://www.med.umich.edu/umhshr/doc/Leadership\\_Perform\\_Eval-Form.doc](http://www.med.umich.edu/umhshr/doc/Leadership_Perform_Eval-Form.doc) )

Nursing Evaluation Forms (link to <http://www.med.umich.edu/umhshr/supervisor/performance-planning.html#eval> )

Performance Expectations & Competencies (link to <http://www.med.umich.edu/umhshr/doc/PerfExpect&Comp.pdf> )

Writing Job-Specific Expectations (link to <http://www.med.umich.edu/umhshr/supervisor/specific-expectations.html> )

Manage Competency Data Entry Instructions (link to document attached)

Manage Competency Report Instructions (link to document attached)

Performance Management System Policy (link to <http://www.med.umich.edu/i/policies/umh/04-06-020.htm> )

Mandatories/Institutional Competency Assessments – All UMHS staff must complete institutional competency assessments (UMHS Mandatories) including Critical Incident Review, Fire Safety, Patient Safety and UMHS Compliance on an annual basis. The blue folder may contain the completion documentation at the end of each module or, if completed in Mlearning, the Mlearning Mandatories Template. The last 3 years documentation are kept in the blue folder.

Mlearning Mandatories Template (link to [http://www.med.umich.edu/umhshr/doc/MLearning\\_Mandatories\\_Template.doc](http://www.med.umich.edu/umhshr/doc/MLearning_Mandatories_Template.doc) )

Competency Assessments – Departmental competency assessments are included in the blue folder or in Mlearning. The last 3 years documentation are kept in the blue folder.

Mlearning Departmental Competency Assessments Template (link to [http://www.med.umich.edu/umhshr/doc/MLearning\\_Dept\\_Competency\\_Assessment\\_Template.doc](http://www.med.umich.edu/umhshr/doc/MLearning_Dept_Competency_Assessment_Template.doc) )

Ongoing Education Documentation - Documentation of ongoing education is required for all UMHS employees. This can include formal classes, training, in-services, workshops, discussion groups, attendance at Employee Forums, participation in Quality Improvement Brown Bag Sessions, attendance at informational staff meetings, job specific videos watched or books read, online learning modules and self-study quizzes, demonstrations, precepting and mentoring. If there are examples in MLearning, place the MLearning Ongoing Educational Template in the blue folder. Keep only the last 3 fiscal years documentation in folder.

Mlearning Ongoing Education Template (link to [http://www.med.umich.edu/umhshr/doc/MLearning\\_Ongoing\\_Educ\\_Template.doc](http://www.med.umich.edu/umhshr/doc/MLearning_Ongoing_Educ_Template.doc) )