

Omar Nazir
Customer Success Manager
Employer HR file

Date: 14 July 2026
Our Reference: FWWC/9BC837D2
Document Type: Checklist

First Written Warning Checklist

1. TASK

Verify factual accuracy of the recorded findings prior to issuing the warning.

Confirm adherence to HRHeaven QA Sample Employer’s disciplinary procedure and consider obtaining legal or specialist HR advice due to high risk level.

Prepare the written First Written Warning letter outlining the findings from the 18 March 2025 hearing.

Include clear, measurable expectations and support arrangements for Omar Nazir.

Detail the appeal process accurately as per company policy.

Schedule the First Written Warning Review meeting for 14 July 2026.

File all final documents securely in Omar Nazir's personnel record.

Follow-up Action Plan



CHECKLIST DETAILS

Employee
Omar Nazir

Role
Customer Success Manager

Case type
Issue First Written Warning

Reference
HRA-9BC837D2



KEY DATES

Completed
14 July 2026

Action	Owner	Due Date	Evidence Required	Status
Review the first written warning record and confirm it reflects the agreed facts.	HR	To be confirmed	Completion note or supporting evidence	Open
First Written Warning Review is due on 14 July 2026.	HR	To be confirmed	Completion note or supporting evidence	Open
Prompt the employer to keep the record factual, check their procedure, preserve the employee's opportunity to respond and obtain specialist advice for protected-rights or dismissal risks.	HR	To be confirmed	Completion note or supporting evidence	Open
Review the Issue First Written Warning record for missing facts, evidence, follow-up ownership or review safeguards before completion.	HR	To be confirmed	Completion note or supporting evidence	Open
Review the completed documents for factual accuracy before issue or filing.	HR	To be confirmed	Completion note or supporting evidence	Open
File the final documents in the employee's personnel record.	HR	To be confirmed	Completion note or supporting evidence	Open

Continued

First Written Warning Checklist

2. OWNER

HR Manager or designated disciplinary officer responsible for drafting and issuing the First Written Warning.

Line Manager to monitor Omar Nazir's progress and provide coaching support.

HR Department to facilitate adherence to appeal process and documentation.

Employee's direct manager to conduct weekly 30-minute time-blocking coaching sessions.

HR to schedule review meeting and record outcomes.

Line Manager to confirm completion of report-writing course is arranged and tracked.

3. PRIORITY

High priority: Ensuring all recorded facts and findings are accurate and that the discipline process follows best practice to mitigate risk.

High priority: Issuance of the First Written Warning letter in a timely and clear manner.

Medium priority: Completion of employee support and training measures within six weeks.

Medium priority: Scheduling and conducting the 12-week review meeting with clear progress metrics.

High priority: Proper documentation and filing for potential future proceedings or appeals.

Continued

First Written Warning Checklist

4. DUE DATE

Finalise and issue First Written Warning letter by 14 July 2026.

Employee to complete report-writing course by approximately 25 August 2026 (within 6 weeks of warning).

Weekly coaching sessions to be scheduled and commence immediately after warning issuance.

Conduct First Written Warning Review meeting on 14 July 2026 (same date as warning issuance noted, ensure review date is correctly assigned per company process).

Employee appeal submissions to be allowed within 10 working days from date of warning letter.

Appeal hearing to be arranged within 15 working days following appeal submission.

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First Written Warning Checklist

5. EVIDENCE REQUIRED

Documented findings from the 18 March 2025 hearing regarding CRM notes and missed deadlines.

Summary of client complaint linked to incomplete handover and audit findings.

Formal First Written Warning letter addressed to Omar Nazir including expectations, support and appeal information.

Confirmation of enrolment or completion of formal report-writing course by Omar Nazir.

Record of weekly coaching sessions conducted with the employee.

Minutes and outcome of the 12-week review meeting following the warning.

Appeal correspondence and hearing notes if applicable.

Ensure evidence documents are checked against source materials before filing and issuance.

6. STATUS

In progress – checklist created and ready for review by HR and line management.

Pending completion of final fact check before letter issuance.

Awaiting completion of employee training and coaching sessions.

Scheduled: First Written Warning Review and associated follow-up actions.

Open: Employee appeal window and process.

Continued

First Written Warning Checklist

7. COMPLETION NOTES

Confirm all relevant facts from 18 March 2025 hearing have been accurately reflected in documentation.

Verify all support and expectation measures are communicated clearly and scheduled.

Ensure adherence to appeal rights and process to maintain procedural fairness.

Maintain neutrality and procedural fairness; avoid prejudging further outcomes or sanctions.

Review all documents before filing to ensure accuracy and completeness.

Maintain confidentiality and security of all personnel records.