

Hannah Reed
HR Business Partner
Employer HR file

Date: 14 July 2026
Our Reference: IIWC/C49878A6
Document Type: Checklist

Informal Warning Checklist

1. TASK

- Hold the informal discussion with the employee to address concerns about punctuality and incomplete work.
- Clarify expected standards regarding arrival times and completion of patient correspondence.
- Document the key points discussed, the concerns raised, and agreed improvements.
- Set a review date to assess progress and provide feedback.
- Prepare and issue the formal informal warning record for the employee's file.
- Schedule and follow up on the review meeting by the agreed date.

Follow-up Action Plan



CHECKLIST DETAILS

Employee
Hannah Reed

Role
HR Business Partner

Case type
Issue Informal Warning

Reference
HRA-C49878A6



KEY DATES

Completed
14 July 2026

First review
22 April 2026

Action	Owner	Due Date	Evidence Required	Status
Review the informal warning record and confirm it reflects the agreed facts.	HR	22 April 2026	Completion note or supporting evidence	Open
Informal Warning Review is due on 22 April 2026.	HR	22 April 2026	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	22 April 2026	Completion note or supporting evidence	Open
Review the Issue Informal Warning record for missing facts, evidence, follow-up ownership or review safeguards before completion.	HR	22 April 2026	Completion note or supporting evidence	Open
Review the completed documents for factual accuracy before issue or filing.	HR	22 April 2026	Completion note or supporting evidence	Open
File the final documents in the employee's personnel record.	HR	22 April 2026	Completion note or supporting evidence	Open

Continued

Informal Warning Checklist

2. OWNER

Line Manager or HR Business Partner responsible for Hannah Reed.

3. PRIORITY

High priority to address performance promptly and minimise clinic disruption.

4. DUE DATE

Initial informal discussion completed on 25 March 2026.

Review meeting scheduled for 22 April 2026.

Formal record prepared by 14 July 2026.

5. EVIDENCE REQUIRED

Notes and summary from the informal discussion held on 25 March 2026.

Records of the two late starts and two incomplete patient correspondence instances, including any manager annotations on required rework.

Copy of the formal informal warning documentation for HR file.

Confirmation of the scheduled review meeting on 22 April 2026.

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Informal Warning Checklist

6. STATUS

Informal discussion held on 25 March 2026 to address punctuality and work performance concerns.

Formal record drafted and ready for filing as of 14 July 2026.

Review meeting scheduled but currently overdue as of 22 April 2026; action required to complete.

7. COMPLETION NOTES

Employer has followed policy by keeping the record factual and proportionate.

Ensure that before filing the formal informal warning, the record accurately reflects agreed facts and expectations.

Conduct the scheduled review promptly to evaluate improvement and next steps.

Advise checking internal policies and seeking specialist advice if there are protected-rights or dismissal risk considerations.

Maintain the employee's opportunity to respond and document further developments appropriately.