

# MANAGING YOUR CAREER

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Keeping Track  
of Important Documents

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A guide by  safely filed

If you're like most of us, you probably spend much more time working for your employer than managing your career. With the daily pressures of "getting things done," those little things that can help you advance at your current employer or find a better job somewhere else get put on the back burner.

Keeping control of your own employment records is important, but even more important is having access to those documents you need if you lost your job.

If you were terminated, company policy may not give you time to collect all those documents. Information that could be critical to getting a new job, like the phone number of that customer who really liked you and told you that if you ever wanted to leave your current employer he has a place for you, could be lost. How about the non-confidential details about a project you worked on that you were really proud of.

Wouldn't it be useful to have one place where you can easily put all those career documents? One place where you wouldn't forget where you put them. One place where all those papers that are really important wouldn't get lost among a pile of bills and junk mail, lost in a filing cabinet or box or buried somewhere in your hard drive. One place that only you have control over.

While you certainly need to comply with the law and your employer's rules and procedures, here's a checklist of some of the documents you may need to prepare and save, or simply collect to make sure you protect your career and reputation. Print this list out. As you collect the documents on the checklist, do the following:

- Upload the documents to your personal SafelyFiled account, and
- Use SafelyFiled to record the location of any originals, and
- Give certain people (like your spouse) access to your account so they will be able to find the originals if for some reason you aren't able to, and
- Check them off the list.

Remember that you'll need to revisit this list occasionally to update those documents you need to retain. Also remember that we have other checklists to deal with the non-work aspects of your life.

## Key Education Documents

The following are documents we tend to lose track of over the years. Put them in your account whenever you run across them.

- Diplomas
- Transcripts
- Certificates of completion of job-related classes
- Certificates of expertise (e.g. Microsoft Certification)
- Graduate and Undergraduate Theses
- Summary of impressive class assignments and projects
- Teacher recommendations
- Examples of your school work (e.g. if you write for a living, a paper on which you got an "A")
- Honor society membership certificates
- School awards
- Newspaper articles about you

## Work-related Documents

As we said earlier, don't violate any laws or any company policy. But having the following documents in a safe place and readily available may help you exercise your rights in the event of a job loss or disciplinary action, help you negotiate a raise or promotion or help you find another job if you need one. Go back to this checklist periodically. Just because you saved and checked off a letter of commendation or a company announcement, doesn't mean there won't be new ones to save.

- Original job offers
- Employment contracts and any addenda
- Performance evaluations
- Letters of commendation or discipline
- Copies of emails of commendation or discipline
- Your notes (dated) on any oral commendation or disciplinary action or discussion
- Short notes  
So you don't forget about projects you've managed/participated in
- Copies of client/customer emails or letters congratulating you personally on your performance
- Company marketing and PR materials that mention you
- Company newsletters that mention you or a project you've worked on
- Company employee policies and procedures
- Company announcements regarding employee benefits or programs
- Company announcements regarding financial results
- Company awards
- Company publications that feature you or a project you worked on
- The phone number and email address of the client who offered you a job
- Your notes (dated) on any possible harassment or discrimination

## Your Career and Compensation History

We tend to change employers a lot more now than we did in the past. Sometimes that summer internship you had 7 years ago and didn't think much about may be the key to a new career.

- ❑ Copies of your W2s and 1099s
- ❑ Your old resumes
- ❑ Your current resume
- ❑ Old job offer letters / emails
- ❑ A list of important projects you've worked on
- ❑ Letters of recommendation
- ❑ Names, titles, phone numbers and email addresses of former bosses
- ❑ Names, titles, phone numbers and email addresses of respected fellow employees
- ❑ Reminders to yourself about work-related organizations you've joined
- ❑ Reminders to yourself about work-related charitable activities (Like United Way or big Brothers / Big Sisters)
- ❑ Membership certificates in professional associations

## Work-related Financial Documents

If your employer reimbursed you for work-related expenses, your employer can deduct those expenses and you don't have to pay income taxes on the amount of the reimbursement. However, if your employer misplaced your expense reports, the IRS could claim that because there were no receipts to support the deductions, you could be taxed on the reimbursements. Don't rely on your employer to retain these records. Keep your own copies in a safe place.

You should also keep track of your work-related benefits. Benefits change over the years and you may want to keep track of not just the current year, but the documents your company sends you every year. Sometimes plans change and you may have benefits under both an old plan and a new plan.

If you leave your employer that doesn't mean that you leave behind everything. You may still be entitled to some benefits.

Hold onto at least the following documents:

- ❑ Receipts for expenses incurred for work
- ❑ Copies of expense reports submitted
- ❑ Every annual explanation of company benefits
- ❑ Deferred compensation documents
- ❑ Bonus documents
- ❑ Pension plan reports and documents
- ❑ 401k plan reports and documents
- ❑ Life, health, disability and dental insurance benefit documents
- ❑ Child care and elder care benefit documents
- ❑ Company manuals and procedures for severance packages
- ❑ Your exit package documents
- ❑ Severance package documents
- ❑ COBRA documents

## Outside of Work Activities

Many of us are generous and help charitable organizations simply out of the goodness of our hearts. Though we might keep track of financial donations for tax purposes, we often forget about the committees, activities and projects where we've donated our time. Your activities and interests outside of work, whether they are for a charitable organization or a sports or art club become important when looking for a new job or even a new career. Keep track of them.

- Certificates of appreciation
- Letters of thanks
- Membership certificates
- Press clippings where you are mentioned
- Notes on projects you've participated in
- Notes on any committees or projects you've managed
- Notes on fund raising activities
- Names and contact information for people you've met when working on an activity

## A Few Other Documents That May Be Important

Sometimes we undertake activities at the request of our employer that are independent from our employer. Sometimes we do work for other entities at the request of our employer, or even on our own. Sometimes we sit on a board of directors and could be liable for the actions of others. Consider these documents:

- ❑ Any written or email request to undertake those activities
- ❑ Any agreements relating to these activities
- ❑ Copies of certificates of insurance (Directors and Officers Workers Comp, Auto and General Liability, etc.)
- ❑ Copies of legal opinions regarding any potentially controversial actions
- ❑ Your short notes regarding these activities
- ❑ The names and contact information of the people you've worked with on these activities

## Reminder

The network of friends and coworkers you develop over the years is extremely important to your career. Don't simply back up your contact information on your hard drive, but keep a copy of it securely in the cloud.