File by FIFO — Manager Training Guide

For Department Managers (HODs)

Welcome

As a department manager, you're responsible for addressing performance and conduct issues in your team. File by FIFO helps you do this correctly and consistently.

This guide covers everything you need to know to manage your team effectively.

Your Dashboard

When you log in, you'll see your manager dashboard with:

Quick Action Buttons (2x2 Grid)

Button	What It Does
Issue Warning	Start the disciplinary wizard
HR Meeting	Request a meeting with HR
Report Absence	Log an employee absence
Recognition	Acknowledge good work

Navigation Cards

- **Team Members** — View your direct reports
- **Follow-ups** — See upcoming review dates for previous warnings

Daily Quote

A motivational quote to start your day (refreshes daily).

Issuing a Warning: The 10 Phases

When you click **Issue Warning**, you'll go through 10 phases. Don't worry—the system guides you through each one.

Phase 1: Select Employee

What to do: Find and select the employee involved in the incident.

- Type their name in the search box
- Click to select them
- You'll see their current warning history

Tip: You can only see employees in your department.

Phase 2: Category & Recommendation

What to do: Choose the type of misconduct and review the system's recommendation.

- Select a category (e.g., "Attendance and Punctuality")
- The system analyzes the employee's history
- It recommends an appropriate warning level

The recommendation is based on: - Employee's existing warnings - South African labour law (LRA) - Progressive discipline principles

You can override the recommendation if there's a good reason (e.g., genuine emergency), but the system will record your decision.

Phase 3: Incident Details

What to do: Document exactly what happened.

- **When:** Date and time (auto-fills with current SA time)
- **Where:** Location/department
- **What:** Describe the incident factually

Good example: > "On 15 January 2026 at 08:45, the employee arrived 45 minutes late for their shift without prior notification."

Bad example: > "Employee is always late and doesn't care about the job."

Stick to facts, not opinions.

Phase 4: Employee Response

What to do: Record what the employee said.

This is crucial for fairness. The employee has a right to give their side.

Examples: > "The employee stated that their car broke down on the N1 and they couldn't find phone signal to call in."

"The employee acknowledged arriving late and apologized, stating it won't happen again."

"The employee declined to comment."

Tip: Record their words, not your interpretation.

Phase 5: Expected Standards

What to do: State clearly what is expected.

- Reference company policy if applicable
- Be specific and measurable

Good example: > "All employees are expected to arrive at their workstation by 08:00 as per the employment contract. If unavoidably delayed, employees must notify their supervisor before the start of the shift."

Phase 6: Improvement Plan

What to do: Get commitments from the employee.

- Click **Add Commitment**
- Enter what they're committing to do
- Set a timeline for each commitment
- Choose a follow-up review date

Example commitments: - "I will set my alarm 30 minutes earlier" — Timeline: Immediately - "I will keep my supervisor's number saved for emergencies" — Timeline: Today - "I will submit medical certificate for any sick leave" — Timeline: Within 3 days

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Phase 7: Review Documentation

What to do: Check everything is correct.

- Read through all the information
- Go back to edit any phase if needed
- Make sure dates, names, and details are accurate

This is your last chance to fix errors before signatures.

Phase 8: Script & PDF Review

What to do: Read the warning script to the employee.

1. Select the script language (employee's preferred language)
2. **Read the script aloud** to the employee
3. This ensures they understand the warning
4. Preview the PDF document

Why this matters: - Ensures the employee fully understands - Prevents "I didn't know" claims later - Shows good faith on your part

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Phase 9: Signatures

What to do: Collect all required signatures.

Order: 1. **Manager signs first** — You sign to confirm the warning is issued 2. **Show PDF to employee** — They see the document with your signature 3. **Employee signs** — They sign to acknowledge receipt 4. **Witness (optional)** — Add a witness signature if appropriate

If employee refuses to sign: - Note their refusal - Have a witness present - The witness signs to confirm the warning was issued

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Phase 10: Delivery

What to do: Choose how to deliver the warning document.

Method	When to Use
Email	Employee has email access
WhatsApp	Employee prefers WhatsApp (common for field workers)
Print	Physical copy needed for files
QR Code	Employee scans to access on their phone

Reporting an Absence

When an employee is absent without proper notification:

1. Click **Report Absence** on your dashboard
2. Select the employee
3. Choose the absence type:
   - Sick leave (with/without certificate)
   - Absent without leave (AWOL)
   - Late arrival
   - Left early
   - Family responsibility leave
   - Other
4. Enter the date(s)
5. Add any notes
6. Submit

HR receives a notification and can follow up.

Booking an HR Meeting

If you need HR's help with a complex situation:

1. Click **HR Meeting** on your dashboard
2. Select the employee (if applicable)
3. Describe the issue
4. Choose preferred meeting time
5. Submit

HR will contact you to arrange the meeting.

Viewing Your Team

Click **Team Members** to see:

- All employees in your department
- Their current warning status
- Basic contact information

You can view individual employee profiles, but you cannot edit their details—only HR can do that.

Common Mistakes to Avoid

Mistake 1: Skipping the Employee Response

Wrong: "They didn't say anything useful, so I left it blank."

Right: Record whatever they said, even if it's "Employee declined to comment" or "Employee stated they had no explanation."

Mistake 2: Using Emotional Language

Wrong: "This employee has a terrible attitude and doesn't respect anyone."

Right: "The employee responded to a work instruction by saying 'This is stupid' in front of three colleagues."

Mistake 3: Not Specifying Expectations

Wrong: "Employee needs to improve their performance."

Right: "Employee is expected to process a minimum of 15 customer orders per hour, as per the performance standards document dated 10 January 2026."

Mistake 4: Forgetting the Follow-Up

Wrong: Issue warning and forget about it.

Right: Set a realistic review date and actually follow up. The system will remind you.

Mistake 5: Treating All Misconduct the Same

Wrong: Jump straight to final warning for a first-time minor issue.

Right: Follow the system's recommendation based on: - Severity of the misconduct - Employee's previous history - Progressive discipline principles

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Quick Reference Card

Situation	What to Do
Employee late once	Verbal discussion, consider counselling
Employee late repeatedly	Issue Warning → Attendance category
Employee absent without notice	Report Absence → then follow up
Serious misconduct	Issue Warning → may warrant higher level
Need HR advice	HR Meeting → describe situation
Employee performing well	Recognition → acknowledge good work

Getting Help

- **In the app:** Click help icons for guidance
- **Email:** support@fifo.systems
- **Your HR team:** For complex situations

Summary

1. **Document immediately** — Issue warnings while details are fresh
2. **Follow the wizard** — Don't skip steps; the system is designed to protect you
3. **Be factual** — Stick to what happened, not opinions
4. **Record responses** — Always document what the employee said
5. **Set follow-ups** — Check that improvement actually happens

You're now ready to manage your team effectively!

Questions? Email support@fifo.systems