# Counseling Checklist for Supervisors

Good planning and follow-up can help you avoid many common pitfalls in counseling. This checklist can help guide you when preparing to counsel an employee. (Resource: [EAP Overview for Supervisors)](https://oer.ny.gov/system/files/documents/2022/07/eap-rack-card-for-supervisors.pdf)

❏ Does the employee know what is supposed to be done, and by when?

❏ Does the employee have:

* the information needed to do the job?
* the skills needed to do the job?
* the resources needed to do the job?
* the necessary training to do the job?

❏ Have I adequately defined the job performance expectations?

❏ Have I discussed concerns with the employee prior to considering counseling as a course of action?

❏ Does the problem have an adverse effect on:

* the employee?
* the co-workers/team? the unit?
* the agency?
* myself as a supervisor?

❏ Are any obstacles beyond the employee’s control getting in the way?

❏ Have I been inadvertently rewarding poor performance by my silence or behavior?

❏ Is anyone else exhibiting the same problem?

❏ Is there a pattern with this employee?

❏ Have I contacted the Office of Human Resources for guidance?