

## Beetle Guide: Post Corrective Action Meeting Checklist

Purpose: To help you stay informed, aware, organized and responsive.

### Gather Facts

- Review all documents, including corrective action forms, notes, or compliance-related references.

### Get Clarity

- Follow up the meeting in writing to confirm what you need to understand. – Clarity is your right!

### Documentation, Policies and Procedures

- Get a copy and review all relevant policies and procedures
- Get or create timelines, occurrences, participants and logs
- (If appropriate) get witness' contact information
- If you hold a license or certification (e.g., RN, CDL, A&P, security clearance) understand whether the corrective action could affect it and what steps you may need to take.
- Review the Appeal and/or Grievance processes
- (If appropriate) Review the Anti-Harassment and Anti Retaliation policies

### Communication

- Stay engaged with your manager to ensure alignment

### Maintain Professionalism

- Keep communication factual, calm and focused
- Limit discussions about the situation with colleagues unless necessary or required.  
**This includes social media platforms.**

### Self-Care

- Remember, being an employee is only part of the entire YOU. Take time to process those feelings and place them where they belong.