
Follow the Paper Trail: Navigating Employee Documentation



First, Document this...



Objectives

Improve Employee Performance

Remove or Separate Unsatisfactory Employees



Importance of Documentation

Improves understanding and documents history

Provides clarity

Cumulative documentation reveals patterns

Assists memory

Improves decision making

Proves communication

Proves fair treatment



Obstacles to Documentation

Morale

Time

Lack of Skill

Fear of Retaliation



Timing of Documentation

Sooner rather than later

Whenever the employer wants to communicate clearly with the employee

When policies and/or procedures are not followed

When performance does not meet expectations

Anytime there is a problem of any kind

How to Document:

Communicate clearly

Rely on facts and observations

Do not use inflammatory language

Write in first person, be direct and to the point

Always use the full date of documentation including year, do not backdate if you document after the fact

Create the documentation close in time to the event

How to: cont.

Make directives (next steps) clear and precise

Treat all employees alike

Avoid writing when angry, write for the public

Avoid spelling and grammar errors





DAYS INN

**WELCOME FREE WIFE
CO NTL BREAKFAST
INDOOR POOL & HOT TUB
HBO ISPN CNN**



I'M GOIN
2
COLLAGE
~~~~~

Let's eat grandma!



Let's eat, grandma!

**PUNCTUATION
SAVES LIVES!**

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MISSPELLING

It Still Matters. A Lot.

DemotivateUs.com



To share or not to share...

Share with employee if

- It could impact their evaluation - mid or end of year

- It will be reported to next supervisor in chain of command

- Or is continual

Should be communicated within ten working days to employee

Then what?

Document receipt by the employee - What if they refuse to sign?

Give the employee an opportunity to respond in writing - can be on the documentation you have prepared or another piece of paper

Correct misunderstandings or misstatements

Refer the employee to specific policies, rules and regulations

Leave a record that other supervisors will understand

All the Pieces of the Puzzle...



Your documentation should contain:

Facts

Policies

Directives/expectations

Solutions/assistance

Action

Activity



What type of document is right?

Memo to File: Minor problems, redirect, refresh memory, make your own system, usually not shared with employee

Specific Incident: Serious enough to require a conference, employee acknowledges receipt, invite employee response, may be reflected in evaluation

Summary Memoranda: Outline conferences regarding several incidents, employee acknowledges receipt, invite employee response, may be reflected in evaluation

Formal Evaluation: Be honest, provide accurate performance feedback

Delivery...

Emails

Conference/Meeting



The Power of Positive

Sometimes, the most powerful documentation you can write is ...POSITIVE!

High - Five: Pass it on



Now Document this...



A black clapperboard with a white and black striped top bar. The clapperboard has fields for TITLE, DIRECTOR, CAMERA, DATE, SCENE, and TAKE.

DATE	SCENE	TAKE

Questions?

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