



DOCUMENTATION, GETTING IT RIGHT

On several occasions over the past year, I was told that my documentation was not good enough to support disciplinary action. I am frustrated. What are the most important issues in documentation for supervisors?



Great question! You may have heard repeatedly “the facts” and details--what, where, when, and who--are the critical elements of documentation.” To be avoided are your opinions, analysis, and psychological appraisal of the worker.

Less discussed, however, is the timeliness of documentation, and the lag time between the incident and when you write it. You may be busy, but as more time passes between an event and documentation, the less accurate that documentation will be. The elapsed time before writing means it is more likely documentation will contain judgments and overtones of your emotional memory and

judgments regarding the incident & personalities involved.

Human memory records & retains precisely how we feel and emotionally respond. Statistics, facts, and precise behaviors are often shaped, constructed, and re-invented by our strong emotional memory over time.

Immediately recording your observations following this simple outline of ‘facts’ is a good start:

- Precise words spoken:
- Precise behavior – body movement:
- Effect on productivity quantity:
- Effect on productivity quality:
- Observed, negative impact(s) on team spirit caused by the above:

Leadership Orientation Training - Session B

Thursday, June 29, 2023
8:30 am – 11:00 am (Virtual)

CONTACT US TODAY:

Please contact our office by calling 800-779-6125 or e-mailing (info@connectionseap.com) for more information or register online:

www.connectionseap.com

ATTENTION: SUPERVISORS, MANAGERS, ADMINISTRATORS:

Session A: “Leadership Orientation to the EAP”, is always available on the website. Please check your wallet cards or contact your HR department for your username and password.

Website Information – Webinars are available in the Work/Life Services site. Log in on Connections website go to Employee or Leadership Resources tab to access webinars, continue to scroll down on the Work/Life Services opening page. (All webinars are archived for later viewing.)

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