The Good, the Bad, and the Ugly: How Strong is your Documentation?

Sometimes bad documentation is worse than no documentation.

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Angie Williams, PHR-CA
Moderator

Rebecca Ward
Marketing Writer
(303) 219-7802
rward@kpaonline.com
Presenter

Angie Williams
Senior HR Client Advocate
(303) 219-7835
awilliams@kpaonline.com
Questions

If you have questions during the presentation, please submit them using the “Questions” feature.

Questions will be answered at the end of the webinar.
HR Catch Phrase

Document!
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Topics

1. Why to Document?
2. When to Document?
3. How to Document?
Why We Document

• To Set Expectations
• Create Clear Consequences
• Defending Actions
• Memories Fade
• Changes in Staff
When to Document

• Injury or Accident
• Performance Appraisals
• Disciplinary Action/PIP
• Terminations
  • Progressive
  • Immediate
How to Document

• Timing

• Content for Disciplinary Action
  • The employer’s expectation.
  • How the employee has failed to meet that expectation.
  • Prior counseling or discipline.
  • The employer’s expectations for the employee going forward.
  • The consequences of the employee’s failure to make the requisite improvement.

• Content and Word Choice
  • Common Mistakes
Common Mistakes

1) Using labels without providing behavioral examples
2) Using words that sound like “proxies” or bias for retaliation
3) Focusing on the employee’s intent (as opposed to results)
4) Focusing on the perceived cause of the performance issue rather than the problem itself
5) Using absolutes that aren’t credible
6) Hedging so much that the employer seems uncertain of the basis for its own decision
Common Mistakes

7) Including too much detail
8) Using technical rather than plain language
9) Unclear consequence for lack of improvement
10) Using labels that may create liability
11) Not being honest about the level of performance
Questions
Contact Us

Angie Williams
Senior HR Consultant
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awilliams@kpaonline.com