

ABC Favorite Assignment: Documentation



CONTACT INFO OF PRESENTER

OCTOBER 25, 2013



Documentation Assignment



- What is documentation?
- When is it used?
- Why is it important?



Teach Types of documentation



- **Performance reviews** —regular intervals
- **Documentation of problems**—
 - Performance management: Put onto “coaching”
 - Behavior—document using progressive disciplinary system with paper trail
- Documentation of major **successes**
 - Letters of appreciation
 - Special awards, designations, accomplishments



Teach Students How to Document



- Know your audience/s & purposes of message
- Tell the story: explain the problem & its context and impact accurately and objectively
- Document while details are recent vs. than after the fact
- Avoid jargon and easily misunderstood terms
- Make it clear that the employee received notice and an opportunity to improve AND more investigation coming
- Make it clear that the employee received warning information (orally & in writing)



More documentation requirements



- Keep message consistent with policy handbooks, labor contracts, etc.
- Follow any precedents carefully and think twice before setting new precedents
- Carefully review the legal and motivational impact of content
- Consider who needs to receive this message, both from a To: and a CC status
- Use a subject line that will help to open the message quickly and code it for future retrieval
- Use headings or formatting to emphasize key ideas.



Options for students to document details



- Sexual harassment scenario via Hot Seat videos
- Stage an incident of insubordination to boss
- Stage an incident where co-worker is threatened



Provide Rubric for Exercise

Documentation Exercise Rubric Elements	Pts. possible	Pts. received
Formats the message clearly in memo to Randall Keene from supervisor Bill Schule. Your name is listed as HR manager. Abbe Wilsby is co-worker of Keene. 1 inch top and side margins. SS with DS between paragraphs. Emphasizes key points.	6	
First paragraph emphasizes purpose of the documentation (why it is being sent) and the context of the situation.	6	
Middle section of message provides accurate details of past interactions between Abbe and Randall. Relevant facts only without emotion/bias. Refers to attached evidence.	6	
Ending clearly explains to Randall what the expectations are of the organization and what the next steps will be.	6	
Clear, concise sentence construction with no editing errors.	6	
Total points	30	
Comments:		



Provide relevant ?' s for case analysis:

- What info would you put in the permanent file?
What level of detail is needed?
- What are the short-term and long-term problems?
- What are the legal & ethical implications?
- Where is the line between consensual relationships and sexual harassment / hostile environment?