



HRxaminer

*Examining practical HR issues business owners
and managers encounter every day*

The Details Are In The Documentation



We all know that we're supposed to "document document document" all of our concerns with our employees and all the corrective discussions we have with them. As we prepare for employee performance reviews and on-going employee feedback, it's also important to have written documentation and notes regarding their successes across the year.

How well are you doing documenting your employees' strengths and opportunities?

Our objective in reviewing employees is to make them more successful in performing their jobs. Making corrective discussions motivational and success-focused isn't always easy, but it's key to getting the results that we need – for the employee, our teams and the organization.

When giving corrective feedback and writing a corrective document, many of us tend to gloss over the details of the message. We tend to think that if the written corrective message is too long, that it's overwhelming to the employee. My perspective is the more detail we give the employee the better the chance that the employee understands the issue and fixes it...or not. If the employee doesn't address the issue, then we have sufficient documentation for further disciplinary action up including dismissal. If the employee makes the necessary change, then we can celebrate the success.

Here are some documentation tips:

- When giving an employee verbal feedback regarding performance or policy issues, document the details of the discussion you had, including the date and time the discussion took place, and who participated.
- Be thorough in describing the incident and/or problems, not just the solution.
- For example, regarding an employee with a repetitive tardiness problem, don't merely write: "It is our expectation that you arrive to work on time."
- Instead, list all the dates the employee was late and how late they arrived to work as evidence of the excessive tardiness. Include parts of your attendance policy that states that excessive tardiness is grounds for corrective action, and then detail your expectations, including what time the employee is required to arrive at work.
- If the employee also is "chatty" when they arrive at work and loses even more time socializing before they get to their desk, I

HR Mastery 2018

It's time to sign up for the **2018 HR Mastery Group!** That's where I facilitate a small group of HR professionals who meet monthly for one year to discuss key HR topics, interact with guest speakers and grow our HR skills and knowledge.

For one annual fee you receive the following:

- HRx hotline – Free access to me throughout the year for phone consultations related to any HR question or issue you may encounter
- 2-hour monthly meetings, with custom selected topics based on your group's interests
- Email and phone access to your HR Mastery team
- Laughter, support and practical information you can use immediately

If you're interested and want more detailed information, please email me at Arlene@ArleneVernon.com or call me at 952.996.0975.

Supervising Smart Series 2018

As we wrap up the 2017 Supervising Smart programs, it's time to tell you about what's planned for 2018. I'm continuing the monthly series of 2-hour supervisory training sessions. They're held from 10:00 am – Noon the 4th Tuesday of each month, except for the 3rd week in December.

We have a new location for 2018: Hamline University Minneapolis Campus in the West End area of St. Louis Park.

If you sign up for all 12 sessions, the cost is \$700 (you can swap attendees). Or you can sign up for individual sessions at \$70 each. I'll be sending out a link for registration in December. But if you want to reserve your spot, call or email me. The group will be limited to 50 attendees.

Here's the schedule:

would include that you consider “on time” to be at their desk working, not just arriving to the office as scheduled.

- Vague documentation can hurt your attempts to defend an unemployment claim or a wrongful termination claim. So, be sure to include that continued policy violations are grounds for further disciplinary action including dismissal.
- Then when the unemployment judge asks, “Did the employee know that this behavior was grounds for termination?” you can answer “yes” and have the evidence to prove it.

If you are providing the employee with a written warning or disciplinary document, be sure to have the employee sign the document acknowledging their receipt. They don’t have to agree with the content, just that the discussion occurred. If they refuse to sign, you (and any other managerial witness to the discussion) should write, sign and date a note that the meeting occurred but the employee refused to sign.

Sometimes your employee discussions are more casual and you don’t come to the meeting with a written document. My recommendation in those cases is to send a follow up email or memo to the employee recapping the discussion and the expectations. That way you have the paper trail you need.

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1/23/18: It’s All About Me: Understanding My Leadership Skills

2/27/18: Successful Orientation and Onboarding

3/27/18: Employment Law for Managers

4/24/18: Effective Decision Making

5/22/18: Managing Change

6/26/18: Values and Redefining the Culture

7/24/18: Everyday Management Do's and Don'ts

8/28/18: Assertiveness: Finding the Balance

9/25/18: Effective Interviews: From Screening to Hire

10/23/18: Collaboration

11/27/18: Creativity / Creative Thinking

12/18/18: Professionalism and Ethics

I hope to see you there!

Announcement

I’ve recently introduced a new website. Check it out at www.HRxcellence.com and let me know your thoughts!

About Arlene Vernon

Arlene has provided HR consulting and management training services to over 500 organizations since starting HRx, Inc. in 1992.

If you’re seeking a hands-on, practical HRxpert to assist your organization with employee relations, policy development, strategic HR activities or fun/doable management training, call on Arlene – Your HRxpert.

If you’re planning a conference, seminar or special event, Arlene specializes in keynotes, seminars and workshops to meet your talent management needs. And if you’re seeking a more lively entertaining activity, Arlene’s custom songs and musical-inspirational keynote may be perfect for your organization!

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