

Documentation

Supervisor Training Series Presented by ICRMP

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Welcome!



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- Bachelor of Science in Psychology
- SHRM-CP, CIWCS, CPHR
- Telecommunications, Manufacturing, Staffing, Marketing, Construction
- Idaho Department of Labor, Micron, MHAB

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If it's not in writing...it didn't happen.

Incorrect documentation is often worse than no documentation

~Bertrand Meyer~

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How does it benefit me?

- Provides supervisors with a record
- Provides future supervisors with a record
- Documentation belongs to the employer
- Send the right message to employees

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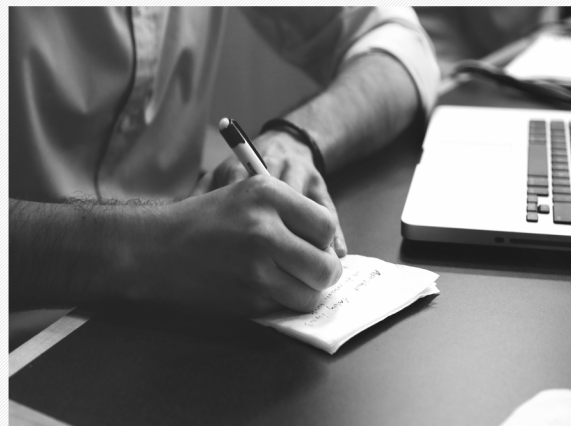
How does it benefit your organization?

- Courts like documentation
- Agencies like documentation
 - EEOC
 - DOL
 - IHRC

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Ingredients for good documentation

- Names
- Dates & times
- Situation / Setting
- Behavior
- Consequences



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Adding the Details

- Explain it to outsiders
- Stick to the facts
- Reference past incidents
- Anticipate criticism
- Timing

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Examples

- The employee was under the influence of alcohol and was sent for “for cause testing”
- The employee smelled like alcohol, and was unsteady on his feet, leaning on the desk to stand up straight.
- The employee is lazy and insubordinate.
- The employee did not complete the annual report by the agreed upon deadline. When asked why, she stated “It’s not really my job, you are just pawning your work off on me”

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Other language I love to see

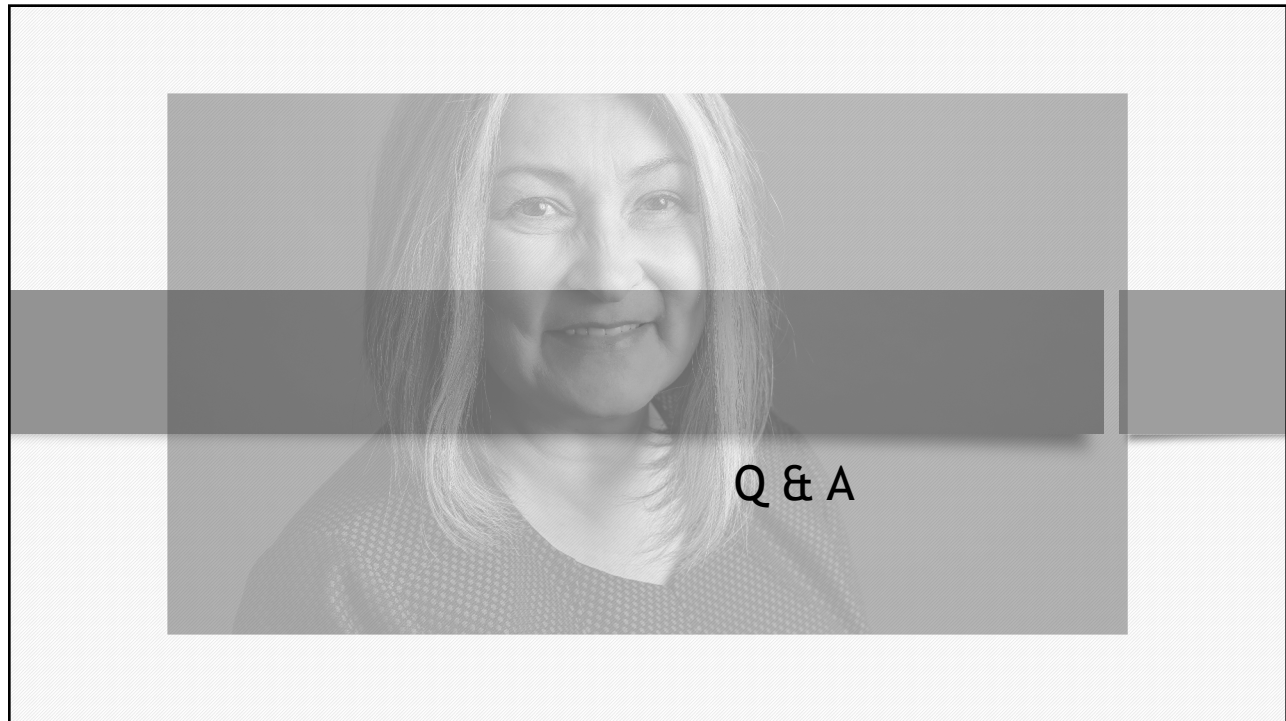
- The employee has agreed to immediate and sustained improvement
- The employee understands that any further incident will result in further disciplinary action up to and including termination of employment
- The employee understand that this behavior negatively impacts ...
- The employee has been re-trained on ... see attached...

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A Balance Approach

- Employee does a good job answering the phone.
- 8/3 Employee did a great job on the helpline. She had a very angry person on the phone who received notice. She was able to de-escalate the situation by being calm and engaging. We will look at having employee mentor others on the helpline.

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More Supervisor Training

- Coaching / Development
- Documentation
- Managing Difficult Employees
- Disciplinary Action
- Reviews
- Performance Management
- Handling Complaints
- Termination
- How to Conduct a Legal Interview

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Contact

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