Good Documentation

Be Accurate

The simplest error can call into question the validity of an entire report. Double-checking and reviewing is critical to eliminating documentation errors and ensuring accuracy. When necessary, any errors that are made should be crossed out with a single strikeout line and the correct information added. The person making the change should initial and date the correction. (This does not apply to electronic documentation.)

Don't spell-check and think that's all the review you need. For example, a supervisor had a document responding to an employee's claim that said, "The employee's claim is viable." Only in the last proofing did someone realize that the phrase should have been "The employee's claim is NOT viable."

Be Objective

All documentation should provide only the facts of what was observed and done; personal opinion should not be included. The drafter's bias or perspective may confuse the accuracy of the documentation.

Specifically, do not include the following in your documentation:

- Personal opinions.
- Rumors or speculation about the employee's personal life.
- Theories about why the employee behaves a certain way. (Don't practice psychiatry without a license.) For example, don't call an employee "crazy." Instead, document behaviors.
- Legal conclusions. (Don't practice law without a license.) For example, instead of saying, "Your conduct was sexual harassment." consider saying "We have concluded that you violated our sexual harassment policy." (which doesn't necessarily mean that the law has been violated), or "Your massaging Jane's shoulders on two occasions was inappropriate and must not be repeated." This makes for a better defense should the complainant sue for sexual harassment.
- Information about the employee's family, ethnic background, beliefs, or medical history.
- Your opinions about the employee's career prospects.
- Unsubstantiated accusations.
- Promises or threats.
- "Always" or "never." For example, "Mike is always late."