

*Webinar on*

# **Do's and Don'ts of Documenting Employee Performance, Behavior and Discipline**

# Learning Objectives

- Why document employee actions?*
- Documentation's role in investigations & lawsuits*
- Analyzing discipline issues*
- Documentation best practices & guidelines*
- Use of subjective terminology vs. objective terminology when documenting issues*
- Documentation errors & pitfalls*
- Good, bad, and ugly documentation examples*
- Role of the formal appraisal process*
- Conducting employee discussions*



- *Handling employee rebuttals*
- *Tactics for providing effective feedback*
- *Document retention guidelines*
- *Contradicting previous documentation*
- *Consequences for not correcting issues*



In the world of human resources and employment, documentation regarding an employee's performance (whether positive or negative) can make or break your ability to discipline, terminate, or fairly promote, reward, and recognize employees.

**PRESENTED BY:**

*Diane L. Dee, President, and Founder of Advantage HR Consulting, LLC is a senior Human Resources professional with over 25 years of experience in the HR arena. Diane's background includes experience in HR consulting, training, and administration in corporate, government, consulting and pro bono environments.*

On-Demand Webinar

Duration : 75 Minutes

Price: \$200

# Webinar Description

Documentation is a crucial component of proper decision making with respect to an employee's improvement or failure to improve performance, the need to take unfavorable action such as discipline or termination, proof that an employee deserves an available promotion or opportunity over other employees who are also eligible, justifying salary increases or decreases, or why the employee received no raise at all.

Maintaining these records allows the employer and employee to preserve a written history of the happenings and discussions that occurred around a specific event. Documentation of the employment relationship provides a written record that may be necessary to support such actions as employee promotion, employee pay raises and disciplinary action—including employment termination. In the event of a lawsuit, complete and thorough documentation protects the employer's interests. The documentation can support management's actions in terminating an unsuccessful employee. It also can prove that the employee was terminated for reasons that are legal as opposed to others such as illegal discrimination.



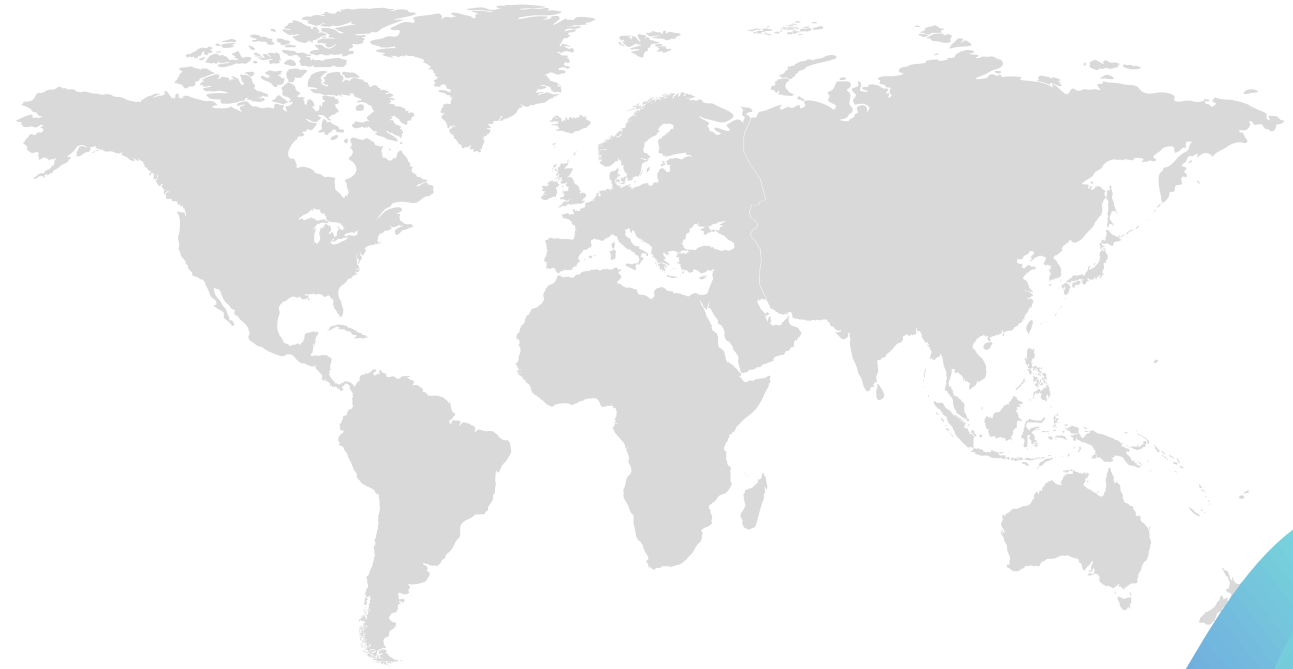
Additionally, proper documentation provides evidence that performance issues were discussed with the employee in a timely and concise fashion. Documentation offers a history of the employee's improvement or failure to improve performance over time. It is chronological and a precise description of the employee's and manager's actions and events as they occur.

The absence or lack of solid documentation is the single most common mistake employers make when documenting issues of employee performance, behavior, and discipline. Not properly documenting can hurt employers in unemployment compensation disputes, workers' compensation cases and other legal matters. Good records, on the other hand, can mean the difference between winning and losing a lawsuit.



# Who Should Attend ?

*Senior Management*  
*HR Professionals*  
*Learning and Development Professionals*  
*Operations Professionals*  
*Managers & Supervisors*  
*Project Managers*  
*Team Leaders*



# Why Should You Attend ?

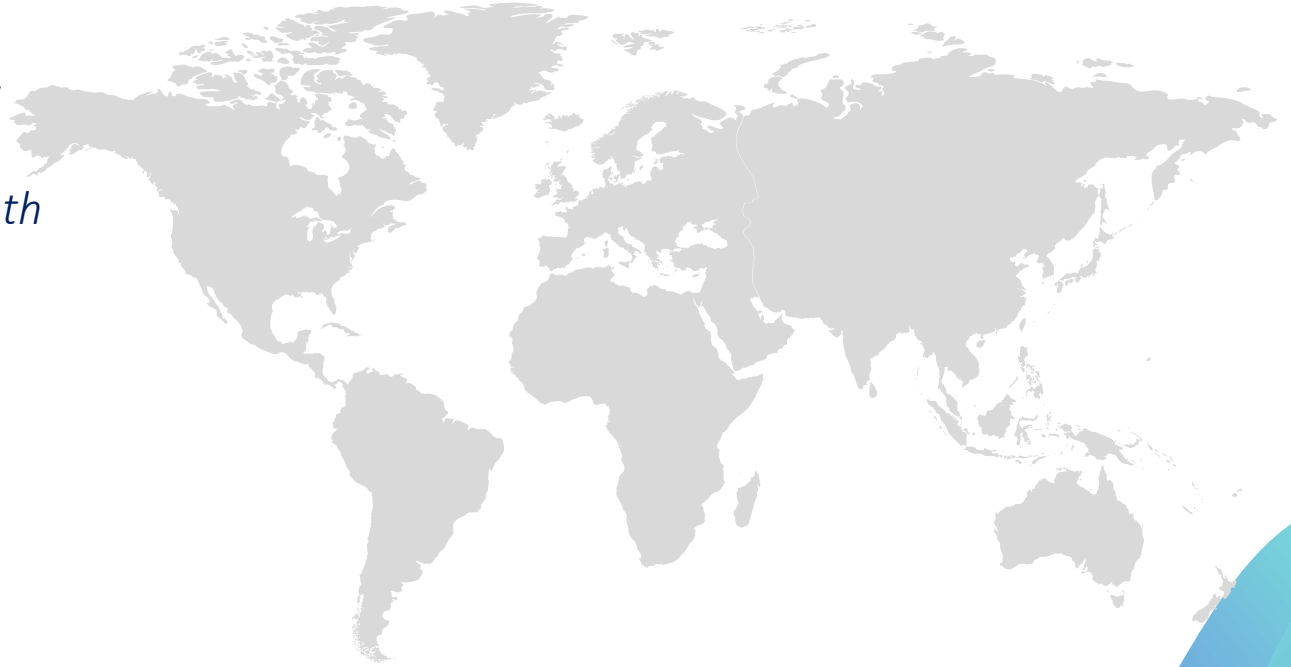
*In the world of human resources and employment, documentation regarding an employee's performance (whether positive or negative) can make or break your ability to discipline, terminate, or fairly promote, reward, and recognize employees.*

*Documentation is essential for managers and HR staff because employers need to make a serious effort to record all events in the employment history of their employees. Proper documentation of employee behavior and performance is critical because memories aren't perfect. Remembering a specific performance issue involving one of a hundred employees which occurred weeks or months years ago isn't easy. Moreover, because the unfortunate reality is that we live in an increasingly litigious society, an employee may deny that the performance issue ever happened and leaves the employer in a "he said, she said" situation when trying to justify a personnel decision.*





*This webinar will provide participants with the information needed to thoroughly document employee performance, behavior, and disciplinary actions. It's important to know the dos and don'ts of documenting to minimize the stress level for both employees and their managers. Participants will learn what documentation the employer must produce, how to store documentation and the importance of knowing your organization's policy on record retention and know where to store the documentation.*



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