

EMPLOYEE DOCUMENTATION QUICK GUIDE

Free manager reference

HRCM|HUMANRESOURCECAPITALMANAGEMENT

PROFESSIONAL HR TOOLS FOR GROWING BUSINESSES

01 HOW TO USE THIS RESOURCE

Clear documentation helps managers preserve facts, communicate expectations and make consistent decisions. Use this guide after meaningful performance, conduct or attendance conversations.

QUICK TIP

Write promptly while details are fresh. If you are uncertain about a serious complaint, protected leave, accommodation or termination issue, pause and seek qualified guidance.

Include these facts

- ☐ Date, time, location and people present
- ☐ The specific behavior, event or performance concern observed
- ☐ The policy, expectation or job requirement involved
- ☐ The employee response or explanation in their own words
- ☐ The agreed next step, support offered and follow-up date

Use objective language

- ☐ Describe what was seen, heard, recorded or measured
- ☐ Use specific dates, examples and measurable expectations
- ☐ Separate verified facts from assumptions or unconfirmed reports
- ☐ Apply the same documentation standard across comparable situations

Avoid these common mistakes

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| ☐ Labels, insults, diagnoses or comments about personality |
| ☐ Vague phrases such as "bad attitude" without examples |
| ☐ Exaggerated words such as "always" or "never" unless fully supported |
| ☐ Promises about outcomes that have not been approved |
| ☐ Deleting or changing earlier records instead of adding a dated update |

Before saving the record

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| ☐ Reread it as if an outside reviewer will see it |
| ☐ Confirm the language is factual, clear and professional |
| ☐ Check that the employee expectation and timeline are understandable |
| ☐ Store the record securely and share it only with authorized people |

Important: This resource provides general educational information and is not legal advice. Requirements may vary by location and business circumstances.