

# 10 STEPS for Consistent & Thorough Documentation

When an employee issue arises, follow these steps to capture the right information in the right way:

- 1** Act on the issue in a timely manner ... don't put it off.
- 2** Check to see if the employee has had similar issues in the past. Understand how similar issues have been handled with other employees.
- 3** Discuss the issue with the employee in a private setting.
- 4** Explain how the behavior or poor performance impacts the employee's job.
- 5** Review relevant company policies. Provide copies to the employee.
- 6** Explain the consequences—both current and potential for future violations.
- 7** Ask if the employee has any questions or if there is anything else of which you need to be aware.
- 8** Following the conversation, document the issue, your conversation and the resolution. Include:
  - Your name
  - Employee's full name
  - Names of any other persons involved (or present during conversation)
  - Date of conversation and date of the incident
  - Summary of issue and resolution/remediation
  - List any documentation provided to the employee.
- 9** In some situations, you may want to provide a copy to the employee.
- 10** Follow-up to make sure the issue has been resolved.

While you can't prevent every employee relations issue, you can change how you respond. HR Acuity is the only technology platform specifically built for employee relations and investigations management. HR Acuity's SaaS technology empowers you with built-in intelligence, templates and reporting so you can conduct best practice, fair investigations; uncover trends and patterns through forward-looking data and analytics; and provide trusted, consistent experiences for your people.



HRACUITY

hracuity.com | info@hracuity.com