

A woman with curly hair is smiling and talking to a man in an office setting. She is wearing a light green shirt and has a black beaded bracelet on her wrist. The man is wearing a light blue shirt. The background is blurred, showing office equipment and windows. A large graphic of two overlapping curved lines, one teal and one orange, is on the right side of the image.

Defendable Documentation

October 14, 2020



Agenda

- 1 Why Documentation
- 2 Preventing the Need to Document
- 3 Documentation Do's
- 4 Documentation Don'ts
- 5 Documenting Disciplinary Actions
- 6 Q&A

Instructions for Submitting Questions with GoToWebinar



- When you launched GoToWebinar, a control panel and a screen share window opened up



- In the control panel, there is a dropdown section entitled, “Questions”



- Open up that section and type your question into the dialog box and hit enter. **If you are a client, please put “CLIENT” in your question**



- Please note that you will not see the questions or comments of others



- We will try to answer all the questions within the allotted time; however, if you did not get your question answered or if you come up with a question after the webinar ended, please contact webinarHRhelp@Vensure.com

Our Panelist



Robin Paggi
Training and Development Specialist

1

Why Document

Why Document

Prevent and Defend Discrimination

Prevent and Defend Wrongful Termination

Exceptions to At-Will Employment

Court Cases

2

Preventing the Need to Document



Preventing the Need to Document

- Apply Rules and Standards Equally
- Give Consistent Signals
- Don't Delay Decisions
- Give Clear Instructions
- Hear Out Employees Before Taking Action
- Avoid Making Decisions on Feelings
- Explain Decisions to Affected Employees
- Keep Communication Channels Clear
- Train Supervisors
- Keep Accurate Records

3

Documentation Do's

Documentation Do's



Candid



Specific



Objective



Timely



Consistent



Balanced



Helpful



Keep Third Parties In Mind

4

Documentation Don'ts

Documentation Don'ts



Abbreviate



Editorialize



Characterize



Manage Employees Through Mail



Forget to Memorialize Verbal Warnings

5

Documenting Disciplinary Actions

Documenting Disciplinary Actions

- Verbal Warnings
- Written Warnings
- Performance Improvement Plans
- Suspensions
- Terminations



6

Q&A



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**Thank You for
Your Time**

