

- Be accurate.
- Be objective. Document facts and behavior, not opinions or interpretations of the employee's behavior.
- Record direct observations of actions and results. Include hearsay only in special circumstances.
- Do not rely on memory. Write things down soon after they happen.
- Use the 5 W's – What happened? When did it happen? Where did it happen? Who was present? What action did you take?

**Verbs to Help Create Effective Documentation**

When you describe an employee's behavior in the workplace, it is important to use observable and measurable language in your documentation. For that reason, the following example verbs may be useful in creating written observations:

Apply	Demonstrate	Perform	State	Classify
Use	Compare	Construct	Explain	Locate
Match	Measure	Report	Summarize	Solve
Operate	Organize	Describe	Translate	Arrange

**Types of Documentation**

Documentation can be created in a number of formats. Some of the most common include but are not limited to:

- Desk notes
- E-mails
- Handwritten reminders
- Summaries of verbal reprimands
- Summaries of counseling meetings
- Written expectations
- Letters of counseling
- Letters of reprimand
- Performance Improvement Plans (PIPs)