



CRESTWARD
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Employee Performance Documentation

Result:

A complete and inclusive compilation of a documents, media, communication, and evidence to support a leadership decision to provide disciplinary actions or termination to an employee.

Materials Needed:

Computer, File or Note Storage System

Position with overall accountability:

Human Resources Director

Reporting Positions:

Steps

1. Create a single space where all the information can be stored and referenced at a later date.
 - a. Options:
 - i. A single file folder secured in a locked cabinet
 - ii. A digital folder on your computer
 - iii. A database tool such as Evernote or OneNote
2. Create a List of all things that you could potentially document
 - a. Examples include:
 - i. Email Conversations
 - ii. Conversations with other employees
 - iii. Performance evaluations
 - iv. Court Records
 - v. Past documented performance problems
3. Create a single running documented timeline with “entries” and attachments (See Example Below)
 - a.

11/8/17 10:45AM

Observing Person (s): John Smith

I witnessed Mr. Jones using his work issued computer during his shift to make personal online purchases for approximately 1 hour.

11/10/17 1:00PM

Observing Person (s): John Smith

I received an email from Mr. Jones stating that he would be late to work due to a personal issue. See Attached Email.

- b. All the data and information that you create needs to be centered around a single timeline of events



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- c. This should be in chronological order for the oldest items at the back to the newest items at the front (or bottom of the document)
 - d. Supporting documents or information should be attached to each “entry” into the folder or system
 - e. Ensure you record everything about each entry possible to not only record the information but to make sure you have enough background to remember the situation. Some good examples are:
 - i. Time/Date
 - ii. Location
 - iii. Names of People Present
 - f. Document items immediately or as soon as possible, do not wait for days to enter as the details will be easily lost.
 - g. PRO-TIP: Ensure any statements are phrased objectively as possible, and that no personal feelings or emotions are detectable in the documentation of the employees actions.
4. If possible document ALL interactions and events with the employee, rather than just negative ones. This can help establish patterns and objectivity.

Standards

1. A complete compilation of relevant employee documents
2. Documents are placed in an easy to access system
3. Content is located in a secure and controlled access location