



Manager Documentation Quick Guide

What to Document. What to Avoid. How to Protect Yourself and the Business.

Most employee issues don't escalate because of what happened.

They escalate because nothing was documented, or it was poorly documented.

Good documentation:

- Protects managers from personal liability
- Protects the company from legal exposure
- Creates clarity and fairness for employees
- Prevents "he said / she said" situations

This guide gives managers a simple, safe framework, without legal jargon or HR overwhelm.

When Managers Should Document

Document when an issue involves patterns, performance, behavior, or risk.

- ✓ Repeated performance issues
- ✓ Missed deadlines or quality problems
- ✓ Attendance or punctuality patterns
- ✓ Behavioral concerns (tone, professionalism, conduct)
- ✓ Policy reminders after verbal coaching
- ✓ Follow-ups after feedback conversations
- ✓ Any issue that *might* be questioned later

Rule of thumb: If you'd want to remember this clearly 6 months from now, write it down.




When Managers Should Not Document (Yet)

- ✗ First-time, minor issues resolved immediately
- ✗ One-off misunderstandings with no impact
- ✗ Emotional reactions without facts
- ✗ Medical details, diagnoses, or assumptions
- ✗ Anything involving protected disclosures (loop in HR instead)

Not every issue needs formal documentation; but patterns always do.

The “Facts, Not Feelings” Rule

Documentation must be objective, factual, and specific.

 What to Include	 What Not to Include	 Where to Store It
<ul style="list-style-type: none">• Date, time, and participants in the discussion• Summary of the issue (what happened, what was discussed)• Expectations set (specific goals, timelines, or changes agreed upon)• Support offered (resources, training, check-ins)• Follow-up plan (when and how you'll review progress)	<ul style="list-style-type: none">• Personal opinions (“lazy,” “unmotivated”)• Emotional language (“disappointed,” “frustrated”)• Speculation about intent	<ul style="list-style-type: none">• A private manager log or HR-approved documentation tool• Shared folder or personnel file (for formal documentation)• Avoid texting or informal apps that aren't part of company systems

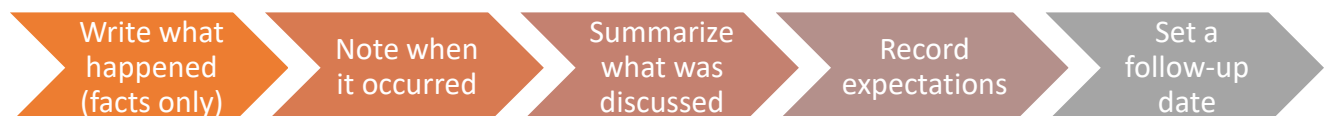
Sample Language

“On April 12, I met with Alex regarding missed client deadlines. We discussed time management challenges and agreed to weekly check-ins every Monday morning. Alex confirmed understanding and committed to improved timelines by May 1.”

Document behavior. Not personality. When in doubt, pause and contact HR.

The 5-Minute Documentation Habit

After any coaching or feedback conversation:



That’s it. You’re not writing a novel. You’re creating a clear record to protect yourself and the company.

One Final Rule

Documentation is not punishment.

It's clarity.

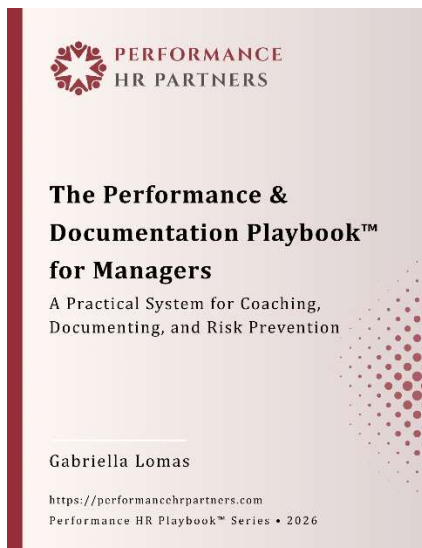
When done correctly, it:

- Helps employees improve
- Supports fair decisions
- Protects everyone involved

Strong managers document early, consistently, and calmly.

Want the Full System?

This guide only covers *what* to document. If you want the full framework for how to coach, escalate, and protect decisions legally:



<https://performancehrpartners.com/performance-and-documentation-playbooktm-for-managers>