

How To Document

Keeping documentation is not only writing down specific details relevant to your situation/case, it also includes retaining important papers, such as any correspondence (memos, letters, e-mails, phone messages) reports, management directives, notes, performance evaluations, copies of your time cards, overtime/vacation/sick leave slips, etc. Good documentation is extremely important if you are having problems within the workplace. Its importance is primary, not only for non-grievable actions, where you may only need an informal meeting with your supervisor to clear up a minor work problem, but for filing grievances and unfair labor practice charges, should your work situation difficulty escalate. The importance of this paper trail in supporting your case cannot be emphasized strongly enough. Because of problems with security and confidentiality at your workplace (management may inspect your desk, its contents, and computer at any time), it would be worthwhile to secure your documentation file in a safe place, such as your home.

Some key points to consider in documentation:

What to document. Meeting notes, (between you and supervisor), verbal exchanges (between you and other significant persons, e.g., supervisor, manager, co-worker), staff meeting notes (who was present, what was said), meaningful incidents--to support your case (e.g., outbursts, observations, consistent work rule infractions by coworkers within your department, though you are the one being singled out and disciplined for the same infractions, or any similar disparate actions). For instance, after meetings with your supervisor/manager, record, as quickly as you can after the meeting what transpired in the meeting. You may choose to give your supervisor/manager a copy of your meeting minutes, though it is not necessary. If your supervisor verbally tells you something of importance or of relevance, memorialize it. You can do this in an e-mail to your supervisor after the verbal encounter.

Organize chronologically. In addition to keeping detailed notes and supporting documents, keeping a time-line is also invaluable. If you prefer to keep only a time-line, in lieu of keeping additional detailed notes, be sure to include all details in your time-line. For quick reference and recall, the time-line is extremely beneficial. With more noteworthy incidents, a full description (with date) of what transpired should be placed in your documentation file. To complete your time-line, put events in time sequential order. Begin with the events leading up to the incident (if one exists), follow with the details of the incident itself and continue with post-incident events. Patterns can be clearly demonstrated over an extended time period. For each written specific you mention in your time-line, place a copy of the corresponding document into your documentation file, i.e., if you mention a copy of an e-mail from your supervisor in your time-line, include a copy in your file.

Document fully. Make sure that you document all relevant circumstances that support your case. You will be surprised to find that what you may have saved in your documentation file, though irrelevant at the time, may become significantly helpful to you later. A rule of thumb to follow: It is better to have more than not enough.

Use full names in your documentation. Use a person's name, and state his/her title, e.g., Jane Doe, my immediate supervisor. Once you have made this identification, you may subsequently refer to that person by full name only. Avoid using he/she or him/her, as individual references may become vague.

- *Vague:* "On June 1, I met with Mary Baker, my department manager, and Alice Morris, my immediate supervisor. She told me that I had an attendance problem." (The last sentence of this example is vague; to whom does she refer? Does *she* refer to Mary Baker or Alice Morris?)

