

Documenting Performance and Conduct

Highlights Sheet

A Supervisory Log is...

A place where you will keep your notes on employee performance and conduct. These notes are simply your memory of incidents and conversations, and they may help you to identify patterns of behavior or ongoing performance issues. Your notes may help you when you need to have a conversation with HR or your manager regarding an ongoing employee issue. You may use your notes to write up an official personnel document such as: a performance appraisal, performance improvement plan or disciplinary document.

Document the following incidents in your supervisory log:

- ✓ Incidents that you observe that may need to be addressed with coaching, a performance improvement plan, or progressive discipline
- ✓ Agreements that you make with an employee
- ✓ Pertinent details of employee coaching sessions
- ✓ Positive actions and recognitions

Best practices for note-taking:

Keep notes brief, specific and based on fact. Include details that would help you to recall a situation or an agreement. For example, you may wish to include:

- ✓ Date and times of incidents, conversations or agreements
- ✓ Names of people involved
- ✓ Specific details of conversations, including quotes, if applicable

A good note-taking system...

Is customized to fit your specific needs as a supervisor or manager; you may use a paper or electronic note-taking system, such as a calendar, notebook, drop file, computer or tablet computer. A good system allows you to:

- ✓ Keep all your notes in one place
- ✓ Find notes when necessary
- ✓ Take notes in the field or “on the fly”
- ✓ Keep notes confidential

