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PROPER DOCUMENTATION TECHNIQUES

The most valuable tool in helping your agency to avoid or to prevail in a lawsuit is proper documentation. There are some basic rules to follow which will make your documentation credible, reliable and able to be used as evidence in your defense in a lawsuit.

Here are ten recommendations for improving your documentation skills:

1. Date all documents.
2. Be sure the author of the document signs their full name, and then prints their name and title below their signature.
3. List all names and titles of persons in attendance in relation to the document.
4. Require the employee to sign and allow her to include on a separate sheet of paper her comments if the document is a disciplinary action or performance appraisal.
5. Specify the number and title of any policy or procedure that is the subject of the document.
6. Complete the document as close to the date of the occurrence as possible.
7. When preparing an account of a situation document the observations and try to limit your use of inferences.
8. Avoid accusations and derogatory comments in your documents unless they can be supported.
9. Avoid using terms that can be construed as a contractual agreement such as promises and guarantees when you do not intend to form a contractual relationship.
10. Use clear, concise language, proper grammar, and correct spelling to create a comprehensible, professional document.