



# AN EDUCATOR'S GUIDE TO DOCUMENTATION

How to document an incident efficiently, effectively, and quickly.

### Method of Delivery

The best method of delivery is by email.

### Length

Ten sentences or less. Short and simple is better than long and complex.

### Date of Document

Always date the document (even an email, headings can be removed). Your document should be sent as quickly as possible (within a day of the incident, if possible) and preferably no later than ten days after the event.

### Specifics of the Incident

State the specific date, day, time, and location of the incident.

### Participants and Witnesses

In addition to stating your presence and the presence of the person(s) involved directly in the event, state the names of any and all witnesses to the incident.

### Direct Quotes

"You said ...." "In response, I said ...."

### Background Information

Give a very, very brief factual explanation of the incident. Just state the facts or, ask questions. NO opinions, feelings, or accusations!

### Ask for Help and/or Advice

If the situation possibly warrants it, ask for help or advice (particularly if the incident involves a classroom, teaching, or student situation).

### Closing Remark / Disclaimer

Write this sentence at the end of the email, "If anything in this email is incorrect, please let me know in writing." Use a "thank you" if it is possible. (Note: You may or may not receive a response.)

You should always keep a copy of the Documentation in a file off-campus or at home.

### Common Types of Documentation

#### Student Behavior

- Classroom Only
- Administrative Involvement

#### Parent Contacts

#### Event or Incident



# UNITED EDUCATORS ASSOCIATION

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# KEY PHRASES IN DOCUMENTATION

**These ideas can be used for improving communication when you have problems with parents, colleagues, supervisors or administrators.**

### **Always Start With A “Thank You”:**

- *“Thank you for the cookies at the last faculty meeting...”*
- If you are yelled at, write, *“Thank you for coming by my room yesterday to let me know your concerns...”*

### **Always End With One Of The Following:**

- *“If there is anything else I can do, please let me know.”*
- *“I assume this information is correct. If not, please let me know.”*
- *“I will incorporate your suggestions as soon as possible. Come by to see how I am using them in class. Let me know if you have any further suggestions.”*
- *“I assume this resolves the situation. If not, let me know.”*

### **In The Middle, Do Not Make Accusations, Or Include Opinions. Simply State Facts And Ask Questions.**

- *“You stated that you were very angry with me, and do not want to talk to me for the rest of the year. Do you think this is best?”*
- *“On Tuesday the 28th of March, I set up a meeting with you to discuss Joe Student. Thank you for your advice regarding discipline of this child. You stated that it was acceptable to bodily remove him. When I asked Mrs. Vice Principal for her suggestions for dealing with his outburst, she said she had none. Could you please clarify what “bodily remove him” means? Where should I take him after removing him? If there are any other consequences you feel are appropriate for this child, while he is in my class, please let me know.”*
- Here is a bad example: *“Do not ever talk to me that way again. You were rude and loud. I will not tolerate that again.”*

### **Other Key Points**

- Whenever there is a verbal conference with someone, it is your responsibility to write him or her a thank you note that documents what was said. This turns “he said, she said” into hard evidence.
- To get results quickly, inform them in writing that you want a response in one week. *“If you could please let me know by this Friday when the moldy ceiling tiles will be replaced, I would appreciate it.”*
- If they do not respond in one week’s time, give them an additional 24 hours. *“Thank you for all the work you put into making the start of the school year a success. Last week, I wrote you about my concerns with the moldy tiles. I asked for a response by today. Please let me know by tomorrow at 3 p.m., if there is a resolution to the problem. If not, I would like the opportunity to call maintenance to get this serious situation resolved. Who would you recommend that I contact?”*
- If you receive no response to this letter, call UEA or the person’s supervisor.

**“THANK YOU!” | FACTS | QUESTIONS | INVITATION**

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