Documentation and Confidentiality Guidance

Document what matters. Protect what is personal.

The pages you keep from your conversations are there to help you remember what matters, recognize patterns, and follow through on the commitments you make. They are not meant to become a record of everything a team member shares. Capture accomplishments, development goals, observable concerns, agreed expectations, and commitments that need follow-through. Write what you observed or what was agreed, rather than assigning motives or judging someone's character.

WRITE THIS… NOT THIS

WRITE WHAT YOU OBSERVED OR AGREED	AVOID MOTIVES, LABELS, AND PRIVATE DETAILS
Arrived after the scheduled start time on March 3, 10, and 17.	She clearly does not care about being on time.
Agreed to complete the new process training by April 30.	He is lazy about learning new systems.
Shared that a personal matter is affecting her schedule. Referred to HR for leave options.	Details of her diagnosis, medications, or family situation.
Said the new role feels overwhelming. We agreed on two support steps.	She can't handle pressure and is falling apart.
Led the team through the system change with patience and clear updates.	Great job!

WHAT TO LEAVE OUT OF YOUR NOTES

- Medical information, diagnoses, medications, or treatment details
- Personal crises, family matters, or relationship details
- Guesses about why someone behaved a certain way
- Labels for someone's character or personality
- Anything you would not be comfortable having the person read

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KNOW WHEN TO BRING IN OTHERS

Most concerns can and should be handled in an ordinary one-on-one conversation, but some cannot. Bring in HR, legal counsel, or other qualified support when any of the situations below are present, and follow your organization's procedures. Do not try to investigate a serious allegation on your own. Write down the facts as they were shared with you, without interpretation, and keep that information private.

☐ Harassment or discrimination

☐ Threats, violence, or safety risks

☐ Possible legal or policy violations

☐ Medical information, protected leave, or a request for accommodation

☐ A crisis that is bigger than one conversation can hold

☐ Any situation where you are unsure what to do

PROMISE DISCRETION, NEVER SECRECY

Treat every conversation with discretion, but never promise to keep something secret. Some concerns must be reported through the proper channels, and a promise you cannot keep will damage trust more than honesty would. You might say, "I will keep this as private as I can, but if what you share involves someone's safety or a legal concern, I may need to involve others." Then tell the person honestly what will happen next and who else may need to be involved.

STORING YOUR PAGES

- Keep completed pages in a secure, private place, never in shared workspaces or meeting rooms.
- Follow your organization's policies on record retention and disposal, and shred pages you no longer need.
- Remember that these pages are a leadership development tool, not a substitute for official personnel records.
- Write with the understanding that someone other than you may someday read what you wrote.

WHEN A CONVERSATION BECOMES A CRISIS

If someone is in immediate danger, call 911. In the United States, these confidential resources are available at any hour.

- **988 Suicide & Crisis Lifeline…** call or text 988
- **National Domestic Violence Hotline…** 1-800-799-7233, or text START to 88788
- **SAMHSA National Helpline…** 1-800-662-4357, for substance use and mental health support

> *This guidance is general and is not legal advice. Your organization's policies and applicable laws always come first, and HR or legal professionals can help you with specific situations.*

Document the growth. Remember the commitments. Protect the person.

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