

## Checklist for Documenting Workplace Issues

Facing challenges at work can be stressful, but documenting these issues properly can make a significant difference in resolving them. Whether you are dealing with harassment, discrimination, or other workplace concerns, having a clear and organized record is essential.

This checklist will help you document incidents effectively, ensuring you have the necessary information to support your case.

### Checklist

#### Date and Time of Incident

- **Action:** Record the exact date and time when the incident occurred.
- **Note:** If the incident is recurring, document each occurrence separately with dates and times.

#### ☐ Location of Incident

- **Action:** Specify where the incident took place (e.g., office, meeting room, virtual meeting).
- **Detail:** Include exact locations if possible (e.g., specific office room or Zoom meeting ID).

#### ☐ People Involved

- **Action:** List the names and roles of all individuals involved in the incident.
- **Detail:** Include any witnesses and their contact information if possible.

#### ☐ Description of the Incident

- **Action:** Provide a detailed, factual description of what happened.
- **Detail:** Avoid subjective language or assumptions; stick to what was seen or heard.
- **Tips:** Use direct quotes if applicable and describe actions and behaviors specifically.

❑ **Actions Taken**

- **Action:** Document any immediate actions you took in response to the incident.
- **Detail:** Include dates and times of any communications with supervisors, HR, or colleagues, and the content of those communications.
- **Examples:** Mention if you sent an email, had a meeting, or called HR, and summarize the discussion.

❑ **Evidence Collected**

- **Action:** Gather and attach any relevant evidence, such as emails, messages, photos, or recordings.
- **Detail:** Note where and how the evidence is stored (e.g., physical copies, digital files).
- **Tips:** Keep copies of all evidence in a secure place, and make digital backups if possible.

❑ **Impact on Work**

- **Action:** Describe how the incident has affected your work performance or environment.
- **Detail:** Include specific examples of emotional, physical, or mental impacts.
- **Examples:** Note any changes in your productivity, stress levels, or workplace relationships.

❑ **Follow-up Actions**

- **Action:** Record any follow-up actions you have taken or plan to take.
- **Detail:** Include any meetings or communications with HR or management, with dates and summaries.
- **Examples:** Describe any ongoing investigations, follow-up meetings, or additional incidents.

❑ **Outcomes**

- **Action:** Note the outcomes of any actions taken to address the issue.
- **Detail:** Document any resolutions or ongoing concerns, and whether

further steps are needed.

- **Examples:** Specify if the issue was resolved, if disciplinary action was taken, or if further investigation is required.

## Conclusion

Properly documenting workplace issues is a crucial step in protecting your rights and ensuring a fair resolution. Use this checklist as a guide to create thorough records that will support your case.

If you need further assistance, don't hesitate to contact Achkar Law for professional advice and support.

## Additional Resources

[Understanding the Employment Lawyer Consultation](#)

[The Complaint Process: Why Formal Documentation Matters](#)

[Workplace Investigations: When Are They Necessary?](#)