

Recording details of meetings with employees template

This template is useful for keeping a record of your meetings and discussions with employees. Employers are advised to always keep written records throughout the process of managing performance or conduct issues. If other people are present in the meeting you may wish to ask them to sign your record to verify it (if they agree with it), however they are not required to do so.

Using this template may assist you to comply with the [Small Business Fair Dismissal Code](#) should the issue you are dealing with result in termination of employment. A copy of the [Small Business Fair Dismissal Code](#) is available at Fair Work Online: www.fairwork.gov.au.

Suggested steps for making a formal recording of meetings with employees

Step 1: Write everything down that is discussed at the meeting

To maximise the value of your record, write down all of the details of the meeting as soon after the event as possible. This will assist you to accurately recall all that happened. Make sure you keep the record as impartial as you can; that is, try to keep it factual and based on what actually happened, not on what you thought or felt of the meeting.

Step 2: Ask others who were present to sign the record if they agree with the contents

Provide a copy of your record of the meeting to the employee and any other people who were present in the meeting. Try to do this as soon as possible after the meeting when it is still 'fresh' in people's minds. Ask them to sign the record if they agree with its contents. If they disagree with the contents, you might need to make some amendments to the record based on their comments before they will sign it. Note that employees and witnesses are not required by law to sign the record.

Step 3: Provide a copy to the employee

You should provide a copy of the formal record of the meeting to the employee for them to keep. If the employee has a copy you will have improved the reliability and transparency of the record should it be relied on in the future.

The Fair Work Ombudsman is committed to providing you with advice that you can rely on.

The information contained in this template is general in nature. If you are unsure about how it applies to your situation you can call our Infoline on 13 13 94 or speak with a union, industry association or a workplace relations professional.

Record of meeting with employee

<Insert date>

Re: Record of meeting with <insert employee's name> regarding <insert brief description of issue such as 'performance' or 'misconduct'>

Today at <insert time>, I met with <insert employee's name>. Also present was <insert names of any other people at the meeting>.

Remember that in any formal meetings, an employee should be allowed to have a representative or support person with them if they want one.

The following paragraphs are examples and suggestions of what might occur during a meeting with an employee. None of this is prescribed or required by law. You may need to change this template to suit your purposes. The important thing is to accurately record what occurred in the particular meeting.

*If you are a small business it is **very important** that you ensure you have complied with the Small Business Fair Dismissal Code if you are considering terminating an employee's employment. Visit www.fairwork.gov.au for a copy of the Small Business Fair Dismissal Code.*

During the meeting I <insert details of what you said/advised/explained to employee>.

<Insert employee's name> said in response that <insert details of what you believe the employee said/advised/explained>.

In order to assist <insert employee's name> to improve their <insert brief description of issue or write 'performance' or 'conduct' if relevant>, I <insert details of what steps you have taken or offered and any deadlines, targets, expectations that you have set the employee for improvement>.

*It is **very important** that you do not set requirements or expectations for the employee that are discriminatory, unlawful or otherwise unreasonable. You may wish to seek professional advice about discrimination and other general protections if you are unsure.*

<Record any other details of the meeting that you have not yet written.>

At the end of the meeting I <insert details of anything else that occurred at the end of the meeting, for example if you gave the person a warning letter or if you set a date for a follow up meeting you should note that here>.

Signed: _____ Date: ____ / ____ / ____

Print name: _____

Note: The section below is optional. Delete if not needed or irrelevant.

Others present in the meeting confirm this record:

Signed: _____ Date: ____ / ____ / ____

Print name: _____

Signed: _____ Date: ____ / ____ / ____

Print name: _____