# Recording details of meetings with employees template

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| 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.

**Record of meeting with the employee**

<Insert date>

**Re: Record of meeting with <insert employee’s name> regarding <insert a brief description of issues 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>.

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>.

<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:

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|  | *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: