

Good notes. Less guessing.

A practical toolkit for HR conversations, case updates, and follow-up.

Dear person who is sure they will remember this later,

You probably will remember the conversation. You may not remember which Tuesday it happened, exactly what was agreed to, or whether you said you would follow up or they did.

That is how a perfectly ordinary case becomes a scavenger hunt through email, calendar entries, and a sticky note that says "Call Jordan." Very helpful. Which Jordan?

Good case notes give the next person enough information to understand what happened, what is still unknown, and what comes next. That next person might be you, three weeks from now.

Write what someone reported. Identify what you verified. Keep your assessment separate. Then record the guidance, the action, and the follow-up. An allegation does not become a fact because you typed it into the system.

You do not need to record every sigh or write a dramatic retelling. "Difficult employee" tells the reader what you thought. "Employee declined to answer and requested a new meeting time" tells the reader what happened.

The goal is a record someone can follow without needing you to narrate it. Clear enough to pick up the work. Specific enough to check the evidence. Honest enough to leave room for information you do not have yet.

Use the guide to set your habits, the example to see the difference, and the blank template for your next conversation. Add a continuation page when you need one. Nobody gets a prize for squeezing an entire investigation into a tiny box.

Live. Laugh. Document.

Colleen

A structure you can repeat.

Use for intake, advice, case updates, and follow-up. Investigation interviews may also need a fuller question-and-answer record.

01 / CONTACT DETAILS

Record the case ID, note author, contact date and time, participants, and channel. If you write later, record the entry date separately.

02 / REASON FOR CONTACT

State the concern or question and relevant event dates. Describe the issue without deciding the outcome in the opening sentence.

03 / INFORMATION AND EVIDENCE

Attribute each account: "Jordan reported..." List records reviewed and where they are stored. Distinguish firsthand observations, secondhand reports, and verified information.

04 / ASSESSMENT AND OPEN QUESTIONS

Separate your analysis from the account. State what is established, disputed, or unknown, and the basis for your assessment. Record what needs to be checked.

05 / GUIDANCE AND ACTION

Capture what you explained, recommended, decided, or completed. Identify who made a decision and its rationale. Do not describe a recommendation as an approved decision.

06 / FOLLOW-UP

Name the owner, action, due date, and next review. Record pending items and closure rationale when the case closes.

BEFORE YOU SAVE

Check names, dates, sources, and commitments. Quote only exact words; label paraphrases. Make dated additions or corrections instead of silently changing the history. Keep relevant records in the approved system with appropriate access; follow retention rules and any preservation hold.

General practice guide, not legal advice or a substitute for organizational procedures. Keep sensitive medical information in the appropriate restricted record under your policies.

References: EEOC, Management Directive 110, Chapter 6 (federal-sector investigation guidance); Acas, Investigations at work, Steps 4-5 (UK guidance). These inform documentation practices; their legal procedures are jurisdiction-specific.

Facts have a source.

Fictional example. Names, dates, and events are illustrative.

THE NOTE THAT LEAVES EVERYONE GUESSING

"Jordan was upset about an unfair schedule. Manager is playing favorites. Told Jordan we would fix it. Follow up next week."

CONTACT DETAILS

Case CN-001 | Contact: October 8, 2026, 10:00-10:20 a.m. Central | Phone | Participants: Jordan Lee, employee; Alex Rivera, HR advisor | Note entered by Alex: October 8, 2026, 10:35 a.m. Central.

REASON FOR CONTACT

Jordan requested a review of weekend shift assignments for September 2026.

INFORMATION AND EVIDENCE

Jordan reported being assigned three weekend shifts while a peer was assigned one. Jordan attributed the difference to favoritism. Alex had not reviewed the schedules or spoken with the manager at the time of this contact. No determination about the assignments or motive was made.

ASSESSMENT AND OPEN QUESTIONS

The assignment counts and reasons remain unverified. Review the September schedule, applicable scheduling guidance, employee availability, and the manager's explanation before assessing the concern.

GUIDANCE AND ACTION

Alex explained that HR would review the available information and provide an update. Alex did not commit to a schedule change. Jordan agreed to provide the schedule screenshots already in their possession.

FOLLOW-UP

Jordan: provide screenshots through the approved channel by October 9. Alex: request scheduling records and the manager's explanation by October 12; update Jordan by October 13 even if the review remains open. Status: open; awaiting information.

Notice the difference: the concern is attributed, verification is pending, the commitment is accurate, and each next step has an owner and a date.

Your next case note.

Use one sheet per contact or update. Attach a continuation sheet with the same case ID when needed.

CASE ID / AUTHOR / ENTRY DATE & TIME

CONTACT DATE & TIME / PARTICIPANTS / CHANNEL

REASON FOR CONTACT

Concern or question; relevant event dates.

INFORMATION AND EVIDENCE

Who reported what? What did you observe or verify? Reference records.

ASSESSMENT AND OPEN QUESTIONS

What is established, disputed, or unknown? What needs checking?

GUIDANCE AND ACTION

What was explained, recommended, decided, or completed? By whom?

FOLLOW-UP AND STATUS

Owner + action + due date. Next review. If closing, record the reason.

Final check: sources identified / analysis separate / commitments accurate / dates checked / access appropriate.
