

Employee Write-Up Template

From QuestionHR (questionhr.com). General information only, not legal advice. Check your own policies, any union or employment agreement, and the rules where the employee works before you use it.

Document level (tick one)

- ☐ Conversational Coaching Form
- ☐ Verbal (Documented) Warning
- ☐ Performance Improvement Plan
- ☐ Final Written Warning

Details

Employee name	
Job title / department	
Manager	
Date of this document	
Date(s) of the incident(s)	
Category (attendance, performance, conduct, policy, safety, other)	

1. What happened (facts only)

Who, what, when, where. Write what you saw, heard or measured. No opinions, labels or guesses about motive.

2. Policy or expected standard

The rule, policy or expectation involved, in neutral words.

3. Prior conversations or warnings

Dates and a short factual summary, or "None documented".

4. Three positives

Three genuine, specific strengths. They show the review is balanced and what to keep doing.

1.

2.

3.

5. Expectations going forward

Specific and measurable. For a PIP: goals, how progress is measured, check-in dates and the review date.

6. Support the employer will provide

Training, resources, check-ins (if any).

7. What happens if expectations are not met

Match the level (coaching: may lead to formal discipline; verbal: may lead to a written warning; PIP: may lead to further discipline; final: may lead to termination).

8. Employee comments

The employee may add comments here or attach a written response.

Acknowledgment

Signing confirms that I received this document. It does not mean I agree with it.

Employee signature / date: _____

Manager signature / date: _____

Witness (if employee declines to sign) / date:

Write-Up Checklist

- ☐ Picked the right level for the issue and the prior steps (coaching, verbal, PIP, final).
- ☐ Every statement is a fact: dates, times, actions, what was said, documents. No opinions or labels.
- ☐ Named the policy or expectation, without inventing a policy number.
- ☐ Listed prior conversations or warnings, with dates.
- ☐ Included three genuine, specific positives.
- ☐ Expectations are specific and measurable, with a deadline or review date.
- ☐ Consequences match the level.
- ☐ Left out medical, health and other sensitive details, and anything about protected characteristics.
- ☐ Checked that the write-up does not closely follow a complaint, leave request or other protected activity without a clear, documented, unrelated reason.
- ☐ Checked spelling, capitalization and punctuation.
- ☐ Left room for the employee's comments and an acknowledgment line.
- ☐ Checked your handbook, any union or employment agreement, and state or local rules that may apply.
- ☐ Gave the employee a copy and kept one in the personnel file.

Want help writing it? Use the free Write-Up Builder at questionhr.com/write-up-builder. Have a question? Ask it free at questionhr.com.