**

**HR Investigation Template**

HR should use this form to detail their investigation into workplace incidents.

**Investigator information**

|  |  |
| --- | --- |
| **Name** |  |
| **Job title** |  |
| **Employee ID** |  |
| **Date** |  |

**Case overview**

|  |  |
| --- | --- |
| Summary of incident | [Provide a concise summary of the incident, including who reported it and when and where it occurred.] |
| Objective of investigation | [Outline the investigation’s objective—what questions need answering and what the main goal of the investigation is.] |
| Name of involved parties | [List the names and designations of the individuals connected to the incident, including the complainant(s), the accused, and any witnesses.] |
| Evidence and documentation | [List the related materials you will attach to this report as evidence, such as emails, text messages, witness statements, or surveillance footage.] |

**Investigation findings and conclusions**

|  |
| --- |
| [Summarize the key findings and draw clear, unbiased conclusions based on what has been proven, what remains unclear, and whether the allegations are substantiated.] |

**Recommendations and next steps**

|  |
| --- |
| [Outline the recommended actions and next steps, including any disciplinary measures, additional training, policy updates, or other steps to resolve the issue and prevent reoccurrences.] |

**Follow-up actions**

|  |
| --- |
| [Track any corrective actions implemented and their effectiveness in preventing similar incidents, as well as the outcomes of investigations or litigation.] |

**Received by**

**Name:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Date**: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ **Signature:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_