



Template: Reporting Harassment, Discrimination and Retaliation

Document Everything!

Use this template to capture when you report discrimination, harassment, and retaliation.

It is important to record all the details as you remember them. If you haven't documented past events, do it now.



TIPS & BEST PRACTICES:

- Get a notebook or online journal to keep all information in one place, easily accessible.
- Keep your record on a non-work device, like a cloud-based file.
- Forward all relevant email communication to your personal email. BCC yourself on your email communications.
- If your employee manual requires additional information than what is included in the template below, make sure to add it (and let us know in the comments).
- For more templates see our Resources Page [HERE](#).
- An example follows the template.



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Reporting Date:	
Reported to:	
Meeting location:	
Meeting time:	
What I reported:	
Company response to my claim:	
I asked for:	
Expectations I communicated and their response:	
Additional questions:	
Next steps / action items:	
Time frame for follow up:	
Additional communication post report:	
Conclusion / result of reporting:	



Template: Reporting Harassment, Discrimination, Retaliation - EXAMPLE of REPORTING DOCUMENTATION

Reporting Date:	01/30/2020
Reported to:	
Include everyone in meeting: Name, Title, Department Human Resources Rep: Jane Jay & Anne Ayer, VP of Operations	
Meeting location:	Corporate HQ, in Pine conference room
Meeting time:	2PM - 3:30PM
What I reported:	
<ul style="list-style-type: none"> • Sexual Harassment by John Joe: Reported all incidents of harassment; gave copy of documentation to Jane Jay • Retaliation: Put on night shift because I rebuffed advances 	
Company response to my claim:	
<ul style="list-style-type: none"> • Response to my claim was neutral. Jane Jay wrote down everything I reported. Had one question about how long I've worked there, and who took over my shift. She read my document while in the room but had no further questions. • Jane Jay went over next steps her department will be taking, including investigation, and answered my questions. • The tone was compassionate but professional and she was neutral. 	
I asked for:	
<p>Asked to remain anonymous in complaint where possible.</p> <ul style="list-style-type: none"> • They said they would keep my complaint anonymous, but some questions they ask may be revealing <p>I asked for paid time off until the investigation is resolved, without using my vacation time;</p> <ul style="list-style-type: none"> • They said they would give me three days off while they find an alternative project, or department for me to work, until the investigation is completed. 	
Expectations I communicated and their response:	
<p>I expect to be informed of everyone who is contacted in regard to the case, even if my name is not used.</p> <ul style="list-style-type: none"> • They said they would inform me of everyone interviewed <p>I expect John Joe to be fired after the investigation is completed.</p> <ul style="list-style-type: none"> • They said this would be decided based on a number of factors, and after the investigation is completed. <p>I expect to be put back on the day shift</p> <ul style="list-style-type: none"> • They said they will look at scheduling <p>I expect my expenses for therapy, babysitter to be reimbursed</p> <ul style="list-style-type: none"> • They said to send receipts and they will review 	



Additional questions:
Who would be investigating my complaints? <ul style="list-style-type: none">• HR investigator Bob Blue, neutral party, doesn't work with my department. Are there any previous complaints against John Joe? <ul style="list-style-type: none">• Can't legally answer; They have to be fair to everyone. Do they take any previous complaints into account: <ul style="list-style-type: none">• Initially they investigate on a case by case basis, so investigation isn't influenced. After initial investigation is completed, the investigator will review all previous complaints and may investigate further.
Next steps / action items:
<ul style="list-style-type: none">• HR Investigation: will take up to a week, including interviews.• HR Find temporary alternative work until investigation is complete.• Me: send documentation of harassment via email• Me: send documentation of costs via email
Time frame for follow up:
<ul style="list-style-type: none">• 5-7 business days
Additional communication post report:
<ul style="list-style-type: none">• Spoke with investigator, Bob Blue on 2/1/2020 for one hour. Answered his questions about circumstances regarding dinner on 12/05/2019. He wanted to know who clients were, what the account was, and what they may have heard.• Amy from HR told me of a cross training opportunity so I can work through the investigation, starting Wed.• 2/4/2020 - Claudia See asked if there was a reason I was working with her department, and if it related to an HR issue. So I know she was interviewed. I told her I am cross training.
Conclusion / result of reporting:
<ul style="list-style-type: none">• Amy & Company Attorney confirmed conclusion of investigation; Harassment found;• They gave me a list of everyone who knows about my complaint• They agree to: put me back on day shift, reimburse me my expenses for therapy and babysitting;• John Joe: will be put on 6 month probation, have to go to harassment training and Changing departments. He will have no one reporting directly to him for his probation time. and have no one reporting to him. If another complaint comes in, he will be fired.• My response: I do not want to report to him even after the 6 month probationary period is over.• Asked that they put everything in writing and they agreed.