Documented Verbal Warning

Complete this record within one working day of the conversation. The warning is given verbally; this form records that it happened and what was agreed. Keep the language factual. Send the completed form to HR for the personnel file.

EMPLOYEE AND MEETING DETAILS

Employee name

Employee ID

Job title

Team / shift / site

Supervisor giving the warning

Date of conversation

Time and place (private room, video call)

Others present (HR, second manager, union representative)

THE ISSUE

Category

☐ Attendance or punctuality ☐ Work quality or productivity ☐ Policy or procedure
☐ Conduct toward others ☐ Safety ☐ Other

Policy, standard or expectation involved

Specific facts (dates, times, numbers, what was observed)

Earlier informal coaching on this issue (dates and what was said)

THE CONVERSATION

- [ ] Explained the issue and why it matters for the team or customers
- [ ] Told the employee this is a verbal warning and part of the disciplinary process
- [ ] Asked for the employee's explanation

Employee's explanation (in their words as closely as possible)

Any factor raised that needs HR follow-up (medical condition, leave, accommodation, harassment, safety concern)

- [ ] None raised
- [ ] Yes: referred to HR on [date]

EXPECTED IMPROVEMENT AND SUPPORT

What must change (specific and measurable)

Support agreed (refresher training, schedule review, job aid, EAP referral)

Follow-up review date

Next step if the issue recurs

- [ ] First written warning
- [ ] Final written warning
- [ ] As set out in the disciplinary policy

RECORD OF THE WARNING

On [Date of Conversation], [Supervisor Name] met with [Employee Name] and gave a verbal warning about [short description of the issue]. The expected standard, the support offered and the follow-up date were discussed and are recorded above. [Employee Name] was told that if the issue continues, the next step under the disciplinary policy is [next step]. This verbal warning will remain active for [6 / 12] months from the date above, provided there is no further issue of the same kind.

SIGNATURES

Supervisor signature

Date

Date

Employee signature (confirms the conversation took place, not agreement)

Date

☐ Employee declined to sign

Witness name and signature (if employee declined)

Date

Received by HR (name and date)

FOLLOW-UP REVIEW

Review date held

Outcome

☐ Improved: no further action ☐ Partial improvement: review extended to [date]

☐ Not improved: moved to next step

Notes