



HR Case Management Checklist Template

Case Intake & Initial Assessment

Documents initial reporting, identifies case type, and determines immediate action required.

Reporting Source Description

Write something...

Case Type

- ☐ Harassment
- ☐ Discrimination
- ☐ Retaliation
- ☐ Performance Issue
- ☐ Other

Date of Incident/Report

Enter date...

Time of Incident/Report (if known)