



Use this checklist to review whether you have a clear record of the assessment process, employee involvement, agreed actions and ongoing review.

Organisation _____

Assessment area _____

Completed by _____

Date reviewed _____

1. Assessment record

- ☐ Keep the completed assessment, including its scope, date and the person responsible.
- ☐ Record the significant workplace stress risks, who may be affected and how.
- ☐ Show the existing controls, further actions required and reasons for key decisions.

2. Employee consultation

- ☐ Record how employees were consulted and which teams, roles or groups were represented.
- ☐ Keep a summary of the workplace themes raised without unnecessary personal details.
- ☐ Retain communications explaining the findings, agreed actions and next steps.

3. Actions and implementation

- ☐ Keep an action plan showing priorities, owners, target dates and review arrangements.
- ☐ Record approvals, resources, decisions and any changes made to the original plan.
- ☐ Retain evidence that agreed actions were completed, delayed or replaced.

4. Monitoring and review

- ☐ Record progress updates against each action and any barriers to completion.
- ☐ Keep evidence used to check whether actions worked, such as follow-up feedback or relevant data.
- ☐ Update the assessment with outcomes, further action and the next review date.

5. Supporting records and storage

- ☐ Retain relevant surveys, data summaries, meeting notes and supporting policies or procedures.
- ☐ Store records securely and limit access to personal or sensitive information.
- ☐ Keep a clear audit trail so the assessment, actions, communications and reviews can be followed.

Notes

