

STELLARUS PRESS

Write It Down

*The Workplace Documentation
Workbook*

SIMPLIFIED EDITION

free from gatheringwhatmatters.com

Kristin Smith, J.D., M.B.A.

FORTHERECORDWORKBOOKS.COM

Write It Down

The Workplace Documentation Workbook

A steady, private place to record what happened —
in your own words, while it's clear.

A Write It Down Workbook · Stellarus Press

Written by Kristin Smith, J.D., M.B.A.

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Write It Down: The Workplace Documentation Workbook

First Edition

fortherecordworkbooks.com · stellaruspress.com

AI Disclosure: This work was authored with the assistance of advanced artificial intelligence systems.

This workbook is offered as an organizational aid for personal use. It is not a substitute for legal, HR, financial, medical, or other professional advice. Please consult appropriate professionals for guidance specific to your situation.

This is a personal record. Consider keeping it somewhere private and safe; employer-issued devices and accounts may not be private.

This workbook is a private place to record workplace experiences, communications, and the details around them. You do not need to know what to call something before you write it down — simply record what happened, when it happened, who was involved, and what came next.

I One experience per entry

Each two-page entry spread holds a single experience, communication, or situation. Use the left page for the facts — when, where, and what happened — and the right page for the context around it and the people who were involved.

2 Log documents separately

When an entry has emails, screenshots, messages, or files connected to it, record them in the Supporting Documents Log. Note them on the entry first, then write down where each one lives so you can find it again later.

3 Write while it is fresh

A short note made close in time is far easier than reconstructing details later. You do not need to write perfectly — start with the date, who was there, what happened, and what you want to remember.

4 Keep it private and safe

Consider keeping this workbook somewhere private. Employer-issued computers, phones, email, and messaging systems may not be private; when you can, use personal storage for your own notes and records.

These are only prompts — there are no right answers. Use whatever language fits your experience, in your own words.

TIME OR TIME PERIOD

morning · afternoon · during a weekly meeting · after hours · over several days · ongoing

LOCATION OR SETTING

office · video or phone call · email · Slack or Teams · text message · client site · work trip · HR meeting

HELPFUL CONTEXT

a recent leave or accommodation request · a medical or caregiving situation · a performance review · prior praise or discipline · a schedule or pay change · a workload issue · a repeated pattern

WHAT HAPPENED NEXT

a follow-up email · a meeting scheduled · HR contacted · an assignment or schedule changed · no response · an apology · repeated conduct

KINDS OF DOCUMENTS

an email · a message screenshot · a calendar invite · a performance review · a paystub · meeting notes · a doctor's note · a written warning

WHERE A DOCUMENT LIVES

personal or work email · a printed folder · phone photos · a cloud or computer folder · an HR or payroll portal · a calendar · a chat platform

What's Inside

THE TWO SECTIONS

01 Your Entries

Recording one workplace experience, communication, or situation at a time

02 Supporting Documents Log

Where each record lives — and what it shows, confirms, or helps you remember

ROOM TO GROW

More Space

Extra entries and document records for when life adds more

Free-form Overflow

A flexible place for anything that doesn't fit neatly on a form

ALSO INSIDE

Begins with *How to Use This Workbook* and *A Few Examples*. Closes with a *Timeline & Patterns* spread, a *Follow-Up Tracker*, and *Notes*.

SECTION ONE

Your Entries

Your experiences, recorded clearly

This is the heart of the workbook. Each entry is a calm, neutral place to record one workplace experience, communication, or situation you may want to remember clearly later — in your own words, without having to decide yet what it means. Use the left page for the facts, and the right page for the context around them.

● Entry Index

A MAP OF WHAT YOU'VE RECORDED

A running list of your entries. Fill this in as you go, so you — or someone you trust — can find any entry in seconds.

NO.	DATE	WHAT IT WAS ABOUT	FOLLOW-UP
1			
2			
3			
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● Entry Index

continued

NO.	DATE	WHAT IT WAS ABOUT	FOLLOW-UP
21			
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When did this happen:

Where did this happen:

What happened:

In your own words — what was said and done, by whom, in what tone, and why it felt important.

Documentation List

Documents, messages, or files connected to this entry.

☐ Please check this box after you have completed adding each document to your Supporting Documents Log.

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What additional information would be beneficial to know?

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SECTION TWO

Supporting Documents Log

Where a record lives — and what it shows

Some entries will have no documents; others may have many. This log keeps them separate, so a single record — an email, a screenshot, a file — can be noted along with where it lives and what it shows, without crowding your entries.

Document No. 1 Related Entry No(s). _____

DOCUMENT NAME / SHORT DESCRIPTION

WHAT DOES THIS DOCUMENT SHOW?

WHERE IS THE DOCUMENT STORED?

DATE OF DOCUMENT (OR APPROXIMATE DATE, IF UNKNOWN)

Document No. 2 Related Entry No(s). _____

DOCUMENT NAME / SHORT DESCRIPTION

WHAT DOES THIS DOCUMENT SHOW?

WHERE IS THE DOCUMENT STORED?

DATE OF DOCUMENT (OR APPROXIMATE DATE, IF UNKNOWN)

Document No. 3 Related Entry No(s). _____

DOCUMENT NAME / SHORT DESCRIPTION

WHAT DOES THIS DOCUMENT SHOW?

WHERE IS THE DOCUMENT STORED?

DATE OF DOCUMENT (OR APPROXIMATE DATE, IF UNKNOWN)

.....

Document No. 4 Related Entry No(s). _____

DOCUMENT NAME / SHORT DESCRIPTION

WHAT DOES THIS DOCUMENT SHOW?

WHERE IS THE DOCUMENT STORED?

DATE OF DOCUMENT (OR APPROXIMATE DATE, IF UNKNOWN)

Document No. 5 Related Entry No(s). _____

DOCUMENT NAME / SHORT DESCRIPTION

WHAT DOES THIS DOCUMENT SHOW?

WHERE IS THE DOCUMENT STORED?

DATE OF DOCUMENT (OR APPROXIMATE DATE, IF UNKNOWN)

Document No. 6 Related Entry No(s). _____

DOCUMENT NAME / SHORT DESCRIPTION

WHAT DOES THIS DOCUMENT SHOW?

WHERE IS THE DOCUMENT STORED?

DATE OF DOCUMENT (OR APPROXIMATE DATE, IF UNKNOWN)

Document No. 7 Related Entry No(s). _____

DOCUMENT NAME / SHORT DESCRIPTION

WHAT DOES THIS DOCUMENT SHOW?

WHERE IS THE DOCUMENT STORED?

DATE OF DOCUMENT (OR APPROXIMATE DATE, IF UNKNOWN)

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Document No. 8 Related Entry No(s). _____

DOCUMENT NAME / SHORT DESCRIPTION

WHAT DOES THIS DOCUMENT SHOW?

WHERE IS THE DOCUMENT STORED?

DATE OF DOCUMENT (OR APPROXIMATE DATE, IF UNKNOWN)

Document No. 9 Related Entry No(s). _____

DOCUMENT NAME / SHORT DESCRIPTION

WHAT DOES THIS DOCUMENT SHOW?

WHERE IS THE DOCUMENT STORED?

DATE OF DOCUMENT (OR APPROXIMATE DATE, IF UNKNOWN)

Document No. 10 Related Entry No(s). _____

DOCUMENT NAME / SHORT DESCRIPTION

WHAT DOES THIS DOCUMENT SHOW?

WHERE IS THE DOCUMENT STORED?

DATE OF DOCUMENT (OR APPROXIMATE DATE, IF UNKNOWN)

● Supporting Documents Log

continued

Document No. 11 Related Entry No(s). _____

DOCUMENT NAME / SHORT DESCRIPTION

WHAT DOES THIS DOCUMENT SHOW?

WHERE IS THE DOCUMENT STORED?

DATE OF DOCUMENT (OR APPROXIMATE DATE, IF UNKNOWN)

Document No. 12 Related Entry No(s). _____

DOCUMENT NAME / SHORT DESCRIPTION

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WHERE IS THE DOCUMENT STORED?

DATE OF DOCUMENT (OR APPROXIMATE DATE, IF UNKNOWN)

Document No. 13 Related Entry No(s). _____

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DATE OF DOCUMENT (OR APPROXIMATE DATE, IF UNKNOWN)

Document No. 14 Related Entry No(s). _____

DOCUMENT NAME / SHORT DESCRIPTION

WHAT DOES THIS DOCUMENT SHOW?

WHERE IS THE DOCUMENT STORED?

DATE OF DOCUMENT (OR APPROXIMATE DATE, IF UNKNOWN)

Document No. 15 Related Entry No(s). _____

DOCUMENT NAME / SHORT DESCRIPTION

WHAT DOES THIS DOCUMENT SHOW?

WHERE IS THE DOCUMENT STORED?

DATE OF DOCUMENT (OR APPROXIMATE DATE, IF UNKNOWN)

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Document No. 16 Related Entry No(s). _____

DOCUMENT NAME / SHORT DESCRIPTION

WHAT DOES THIS DOCUMENT SHOW?

WHERE IS THE DOCUMENT STORED?

DATE OF DOCUMENT (OR APPROXIMATE DATE, IF UNKNOWN)

Document No. 17 Related Entry No(s). _____

DOCUMENT NAME / SHORT DESCRIPTION

WHAT DOES THIS DOCUMENT SHOW?

WHERE IS THE DOCUMENT STORED?

DATE OF DOCUMENT (OR APPROXIMATE DATE, IF UNKNOWN)

Document No. 18 Related Entry No(s). _____

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WHERE IS THE DOCUMENT STORED?

DATE OF DOCUMENT (OR APPROXIMATE DATE, IF UNKNOWN)

Document No. 19 Related Entry No(s). _____

DOCUMENT NAME / SHORT DESCRIPTION

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WHERE IS THE DOCUMENT STORED?

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Document No. 20 Related Entry No(s). _____

DOCUMENT NAME / SHORT DESCRIPTION

WHAT DOES THIS DOCUMENT SHOW?

WHERE IS THE DOCUMENT STORED?

DATE OF DOCUMENT (OR APPROXIMATE DATE, IF UNKNOWN)

Document No. 21 Related Entry No(s). _____

DOCUMENT NAME / SHORT DESCRIPTION

WHAT DOES THIS DOCUMENT SHOW?

WHERE IS THE DOCUMENT STORED?

DATE OF DOCUMENT (OR APPROXIMATE DATE, IF UNKNOWN)

Document No. 22 Related Entry No(s). _____

DOCUMENT NAME / SHORT DESCRIPTION

WHAT DOES THIS DOCUMENT SHOW?

WHERE IS THE DOCUMENT STORED?

DATE OF DOCUMENT (OR APPROXIMATE DATE, IF UNKNOWN)

Document No. 23 Related Entry No(s). _____

DOCUMENT NAME / SHORT DESCRIPTION

WHAT DOES THIS DOCUMENT SHOW?

WHERE IS THE DOCUMENT STORED?

DATE OF DOCUMENT (OR APPROXIMATE DATE, IF UNKNOWN)

.....

Document No. 24 Related Entry No(s). _____

DOCUMENT NAME / SHORT DESCRIPTION

WHAT DOES THIS DOCUMENT SHOW?

WHERE IS THE DOCUMENT STORED?

DATE OF DOCUMENT (OR APPROXIMATE DATE, IF UNKNOWN)

Document No. 25 Related Entry No(s). _____

DOCUMENT NAME / SHORT DESCRIPTION

WHAT DOES THIS DOCUMENT SHOW?

WHERE IS THE DOCUMENT STORED?

DATE OF DOCUMENT (OR APPROXIMATE DATE, IF UNKNOWN)

Document No. 26 Related Entry No(s). _____

DOCUMENT NAME / SHORT DESCRIPTION

WHAT DOES THIS DOCUMENT SHOW?

WHERE IS THE DOCUMENT STORED?

DATE OF DOCUMENT (OR APPROXIMATE DATE, IF UNKNOWN)

Document No. 27 Related Entry No(s). _____

DOCUMENT NAME / SHORT DESCRIPTION

WHAT DOES THIS DOCUMENT SHOW?

WHERE IS THE DOCUMENT STORED?

DATE OF DOCUMENT (OR APPROXIMATE DATE, IF UNKNOWN)

.....

Document No. 28 Related Entry No(s). _____

DOCUMENT NAME / SHORT DESCRIPTION

WHAT DOES THIS DOCUMENT SHOW?

WHERE IS THE DOCUMENT STORED?

DATE OF DOCUMENT (OR APPROXIMATE DATE, IF UNKNOWN)

Document No. 29 Related Entry No(s). _____

DOCUMENT NAME / SHORT DESCRIPTION

WHAT DOES THIS DOCUMENT SHOW?

WHERE IS THE DOCUMENT STORED?

DATE OF DOCUMENT (OR APPROXIMATE DATE, IF UNKNOWN)

Document No. 30 Related Entry No(s). _____

DOCUMENT NAME / SHORT DESCRIPTION

WHAT DOES THIS DOCUMENT SHOW?

WHERE IS THE DOCUMENT STORED?

DATE OF DOCUMENT (OR APPROXIMATE DATE, IF UNKNOWN)

Document No. 31 Related Entry No(s). _____

DOCUMENT NAME / SHORT DESCRIPTION

WHAT DOES THIS DOCUMENT SHOW?

WHERE IS THE DOCUMENT STORED?

DATE OF DOCUMENT (OR APPROXIMATE DATE, IF UNKNOWN)

.....

Document No. 32 Related Entry No(s). _____

DOCUMENT NAME / SHORT DESCRIPTION

WHAT DOES THIS DOCUMENT SHOW?

WHERE IS THE DOCUMENT STORED?

DATE OF DOCUMENT (OR APPROXIMATE DATE, IF UNKNOWN)



ROOM TO GROW

More Space

Because life keeps adding more

No workbook ever has quite enough room. The pages that follow are extra entries and document records — for the things you remember later, and the way life keeps adding more people, more details, and more to hold.

When did this happen:

Where did this happen:

What happened:

In your own words — what was said and done, by whom, in what tone, and why it felt important.

Documentation List

Documents, messages, or files connected to this entry.

☐ Please check this box after you have completed adding each document to your Supporting Documents Log.

Additional Context

What additional information would be beneficial to know?

Who Was Involved

NAME

ROLE / RELATIONSHIP

HOW WERE THEY INVOLVED?

_____	_____	_____
_____	_____	_____
_____	_____	_____

When did this happen:

Where did this happen:

What happened:

In your own words — what was said and done, by whom, in what tone, and why it felt important.

Documentation List

Documents, messages, or files connected to this entry.

☐ Please check this box after you have completed adding each document to your Supporting Documents Log.

Additional Context

What additional information would be beneficial to know?

Who Was Involved

NAME

ROLE / RELATIONSHIP

HOW WERE THEY INVOLVED?

Document No. 33 Related Entry No(s). _____

DOCUMENT NAME / SHORT DESCRIPTION

WHAT DOES THIS DOCUMENT SHOW?

WHERE IS THE DOCUMENT STORED?

DATE OF DOCUMENT (OR APPROXIMATE DATE, IF UNKNOWN)

Document No. 34 Related Entry No(s). _____

DOCUMENT NAME / SHORT DESCRIPTION

WHAT DOES THIS DOCUMENT SHOW?

WHERE IS THE DOCUMENT STORED?

DATE OF DOCUMENT (OR APPROXIMATE DATE, IF UNKNOWN)

ROOM TO GROW

Free-form Overflow

Anything that doesn't fit a form

For anything that touches more than one place, or doesn't fit a form at all
— a thought, a loose end, a note to your future self. Use these pages
however helps.

For anything that touches more than one place, or doesn't fit a form at all. Use it however helps.

Entry 1

RELATES TO ☐ An entry ☐ A document ☐ Something else

TITLE / ITEM

WHERE / CONTACT / DETAIL

NOTES

Entry 2

RELATES TO ☐ An entry ☐ A document ☐ Something else

TITLE / ITEM

WHERE / CONTACT / DETAIL

NOTES

Entry 3

RELATES TO ☐ An entry ☐ A document ☐ Something else

TITLE / ITEM

WHERE / CONTACT / DETAIL

NOTES

Entry 4

RELATES TO ☐ An entry ☐ A document ☐ Something else

TITLE / ITEM

WHERE / CONTACT / DETAIL

NOTES

Entry 5

RELATES TO ☐ An entry ☐ A document ☐ Something else

TITLE / ITEM

WHERE / CONTACT / DETAIL

NOTES

Entry 6

RELATES TO ☐ An entry ☐ A document ☐ Something else

TITLE / ITEM

WHERE / CONTACT / DETAIL

NOTES

Entry 7

RELATES TO ☐ An entry ☐ A document ☐ Something else

TITLE / ITEM

WHERE / CONTACT / DETAIL

NOTES

Entry 8

RELATES TO ☐ An entry ☐ A document ☐ Something else

TITLE / ITEM

WHERE / CONTACT / DETAIL

NOTES

Entry 9

RELATES TO ☐ An entry ☐ A document ☐ Something else

TITLE / ITEM

WHERE / CONTACT / DETAIL

NOTES

Entry 10

RELATES TO ☐ An entry ☐ A document ☐ Something else

TITLE / ITEM

WHERE / CONTACT / DETAIL

NOTES

Entry 11

RELATES TO ☐ An entry ☐ A document ☐ Something else

TITLE / ITEM

WHERE / CONTACT / DETAIL

NOTES

Entry 12

RELATES TO ☐ An entry ☐ A document ☐ Something else

TITLE / ITEM

WHERE / CONTACT / DETAIL

NOTES

Entry 13

RELATES TO ☐ An entry ☐ A document ☐ Something else

TITLE / ITEM

WHERE / CONTACT / DETAIL

NOTES

Entry 14

RELATES TO ☐ An entry ☐ A document ☐ Something else

TITLE / ITEM

WHERE / CONTACT / DETAIL

NOTES

Entry 15

RELATES TO ☐ An entry ☐ A document ☐ Something else

TITLE / ITEM

WHERE / CONTACT / DETAIL

NOTES

Entry 16

RELATES TO ☐ An entry ☐ A document ☐ Something else

TITLE / ITEM

WHERE / CONTACT / DETAIL

NOTES

Entry 17

RELATES TO ☐ An entry ☐ A document ☐ Something else

TITLE / ITEM

WHERE / CONTACT / DETAIL

NOTES

Entry 18

RELATES TO ☐ An entry ☐ A document ☐ Something else

TITLE / ITEM

WHERE / CONTACT / DETAIL

NOTES

Entry 19

RELATES TO ☐ An entry ☐ A document ☐ Something else

TITLE / ITEM

WHERE / CONTACT / DETAIL

NOTES

Entry 20

RELATES TO ☐ An entry ☐ A document ☐ Something else

TITLE / ITEM

WHERE / CONTACT / DETAIL

NOTES

Sometimes a pattern is only visible from a distance. Note key dates here, in order, so the shape of things becomes easier to see.

DATE	WHAT HAPPENED · RELATED ENTRY

Patterns I've noticed

Anything that seems to repeat, escalate, or connect.

● Timeline & Patterns

continued

Small next steps, in one place. Check them off as you go — no pressure, no deadline.

DONE	TASK / NEXT STEP	RELATED ENTRY
☐		
☐		
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ABOUT THE AUTHOR

Kristin Smith, J.D., M.B.A.

Kristin is the founder of Stellarus Intelligence and the publisher behind Stellarus Press. She writes and builds at the intersection of law, technology, and everyday life — making approachable tools for the things that matter.

She is the author of the *Write It Down Workbooks* series and the *Holding What Matters* series, among others. She believes the most useful thing a person can keep is a clear, calm record — written down before it's needed.

*“The clearest record is the one you start
today.”*

Write It Down

The Workplace Documentation Workbook

A Write It Down Workbook · by Stellarus Press · fortherecordworkbooks.com

Empowering you to better understand — and navigate — workplace experiences
through clear records and AI literacy.