

Investigation interview invitation email template

Invite a witness or the accused employee to an investigation interview, fairly and without prejudging.

Updated October 15, 2026. Written and reviewed by the HRTally Research Team.

When to use this template

During a workplace investigation, HR or an investigator interviews the person who complained, the person accused, and any witnesses. Each needs an invitation that explains the purpose of the meeting without revealing more than necessary, and without suggesting the outcome is already decided.

Keep invitations neutral and short. Say it's part of a review, give the time and place, explain who will be there, and remind the employee about retaliation protections and the need for discretion. For the accused employee, say that no decision has been made and that they will have a chance to respond. Our harassment prevention guide explains the investigation process.

Version 1: Witness invitation

SUBJECT Meeting request: [Date] at [Time]

Hi [Employee first name],

I'm looking into a workplace matter and would like to speak with you because you may have relevant information. You aren't in trouble, and this meeting isn't about your performance.

When: [Day, Date] at [Time], for about [30 to 45] minutes

Where: [Private room or video link]

Who: [Investigator name and title]

Please be as accurate as you can, and tell us if you don't know or don't remember something. We ask that you keep the meeting and what's discussed private while the review is underway, so it can be fair to everyone. You are still free to talk about your own working conditions.

Retaliation against anyone who takes part is not allowed. If you have concerns, call me at [Phone].

[Investigator or HR name]

Version 2: Invitation to the accused employee

SUBJECT Meeting about a workplace concern on [Date]

Hi [Employee first name],

We have received a concern that involves you, and I would like to meet to hear your perspective. No decision has been made, and this meeting is your opportunity to share your side.

When: [Day, Date] at [Time]

Where: [Private room or video link]

Who: [Investigator name and title] [and a note taker]

During the meeting, I will explain the general nature of the concern and ask you questions. You can bring any documents or messages you think are relevant, and you can suggest people we should speak with.

Please don't contact anyone involved about this matter while the review is underway, and remember that retaliation against anyone who raised a concern or took part is prohibited.

[If the employee is in a union: you may request a union representative to attend.]

[Investigator or HR name]

Subject lines to try

- Meeting request: [Date] at [Time]
- Meeting about a workplace concern on [Date]
- Request to meet with HR
- Confidential meeting request
- Your input on a workplace matter

How to personalize it

- Keep the subject line neutral.
- Tell witnesses clearly they aren't in trouble.
- Give the accused employee a real chance to respond.
- Choose a private location away from the work area.

Mistakes to avoid

- Naming the complainant in a witness invitation.

- Language that presumes guilt.
- Broad instructions never to discuss the matter.
- Scheduling interviews in a glass-walled office everyone can see into.

| Legal and compliance notes

Under the NLRA's Weingarten rights, unionized employees can request a union representative at an investigatory interview they reasonably believe could lead to discipline. Discretion requests should be narrowly tailored, since the NLRB has scrutinized blanket confidentiality rules. If the investigation involves possible criminal conduct, or the employee asks for a lawyer, talk with counsel. Interview notes and the final report should be kept in a confidential file.

| When to send it

Start interviews within days of receiving the complaint. Interview the complainant first, then witnesses, then the accused, and follow up as needed.

| Before you hit send

- HR or counsel reviewed the message if discipline or a complaint is involved.
- Facts are stated with dates, without opinions or labels.
- Protected leave or a recent complaint plays no part in the action described.
- Any request for discretion is narrow and explained, not a blanket ban.
- A copy is saved to the employee file or the case record.

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