**RESPECTFUL WORKPLACE INTERVIEW CHECKLIST**

**Instructions: This checklist is a guideline for use after a complaint (DOA – 15812) has been completed and an intake has been assigned by an Equity and Inclusion (EI) Professional.**

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| **Complainant Name** |       |
| **Date Complaint Reported** |       |
| **Date of Intake Interview** |       |
| **Interviewer Name** |       |
| **Complaint Number** |       |

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| **PRIOR TO THE INTAKE INTERVIEW** |
| [ ]  | Review the complaint documents if submitted by complainant |
| [ ]  | Establish an appropriate place and time to meet with the complainant |
| [ ]  | Make arrangements to have a support person present (if requested) |
| [ ]  | Prepare interview questions (all notes should be taken in a question/answer format) |
| **AT THE INTAKE INTERVIEW** |
| [ ]  | Provide and discuss the Respectful Workplace Complaint Information guide |
| [ ]  | Clarify and gather additional information by reviewing all sections of the complaint form |
| [ ]  | Obtain:* + Name of respondent(s)
	+ Names of witnesses and information that they can provide
	+ Relevant documents including memorandums, letters, e-mails, etc., to support the complaint
	+ How the alleged behavior is connected to their membership in a protected class, if applicable
 |
| [ ]  | Clarify complainant’s connection between allegations and membership in a protected class, if applicable |
| [ ]  | Explore possible alternate resolutions* + Conflict resolution meeting with the respondent
	+ Mediation
	+ Reasonable accommodations
	+ FMLA
	+ EAP
 |
| **AFTER THE INTAKE INTERVIEW** |
| [ ]  | Prepare notes for file (question/answer format) |
| [ ]  | Prepare a Findings Summary (typed) |

**RESPECTFUL WORKPLACE INTAKE COVER PAGE**

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| **FORWARD ALL OF THE FOLLOWING INFORMATION TO THE EI/HR PROFESSIONAL** |
| [ ]  | DOA-15812 Complaint Form |
| [ ]  | Interview notes in question/answer format |
| [ ]  | Findings Summary |
| [ ]  | Other relevant documents, including evidence supplied by the individual |
|  **EI OFFICER/DESIGNEE REVIEW**  |
| Review all intake information to determine if: |
| [ ]  | there is a link to protected class |
| [ ]  | a disciplinary investigation is needed (link to protected class or other work rule violations) |
| [ ]  | the issue should be addressed through job instruction and performance |
| [ ]  | training is necessary |
| [ ]  | fact-finding is necessary |