**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 |