

Sample guide for interviewing impacted person/patient/resident - documentation tool

Name of interviewee:

Interview completed by:

Patient/complainant name:

Date of interview:

Relationship to patient:

Date of event:

Time of event:

Action step(s)

Action:

- Introduce self and your specific role.
- Ask permission to use the patient's/resident's preferred name.
- Focus on what you would like to see happen in the interview and ensure that the patient's goals are in line with the planned meeting.
- Establish rapport, ensure for a comfortable time to have the discussion, and put patient at ease.
- Use open-ended questions.
- Be respectful even when not in agreement with what is being discussed.
- Ask the patient directly what they would consider to be a successful outcome from the meeting.
- Maintain privacy of employee, policies, and business records.
- Ensure for patient readiness to discuss the situation.
- Put caller at ease, making it clear you have the time to spend with them.
- Should the caller become abusive, utilize limit-setting strategies to either take back control of the call or conclude the discussion with a possible rescheduled at another time. With a future call you may wish to indicate the specific amount of time you have available.
- Consider having someone take notes and let the patient know that such note taking is part of the process.
- If the patient wants to record the meeting, advise them of your policy for such. Ideally, this should be discouraged.

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- Periodically, summarize your understanding of what has been said.
- Use body language to convey interest and engagement such as non-verbal encouragement, listening attentively, neutral utterances, etc.
- Respond to emotion and feelings by acknowledging what has been shared.
- Encourage calling law enforcement for the patient.
- If law enforcement is called, they may ask you to stop your interview.

Question(s) for the patient:

Select as needed

Question:

What are the things you want to discuss today?

Quote patient directly.

Have you been to any of our locations before?

Have you experienced any problems with service before?

What are your general recollections of your visit to our facility?

What time was your appointment?

What time were you called?

What date did the event occur?

What happened?

Where did it happen?

Were you alone?

Can you recall anyone else who was present?

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Has anything like this happened before?	
Was there physical contact? Describe what happened.	
What did you immediately do or say when the event happened?	
Did the employee tell you what they were going to do before they did it?	
How did they react to what you said to them?	
Is there anything else you want to tell me that I have not asked you?	
Question(s) for the witness: <i>Family or Friend - Non-employee</i>	
What did you witness?	
What date did the event occur?	
What happened?	
Where did it happen?	
Did anyone else see it happen?	
Can you recall anyone else who was present?	
What did you do after witnessing the event?	
Did you say anything to the patient? To other people?	



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Did you make a report to management?	
Do you know anything more that could shed light on the event?	
Is there anything else you want to tell me that I have not asked you?	



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