

Employee Interview

Planning and Notes Sheet

Build an account of what the person experienced. Keep their account separate from your interpretation and from what other sources establish.

Event / case ID: _____ Interview date / time: _____

Interviewer: _____ Participant reference: _____

1 Prepare a respectful conversation

Check immediate care and readiness. Arrange a suitable location, language support, and any representation required by applicable rules or agreements. Follow approved interview and privacy procedures.

Purpose / topics to explore / known gaps:

Support / breaks / location / recording arrangements:

Explain who will use the information, how notes will be handled, and confidentiality limits. Obtain any required permission before recording. Do not promise immunity or absolute confidentiality.

2 Invite the account; then clarify

Please walk me through what you were doing, from the point that makes sense to you.

What did you see, hear, or notice? What happened next?

What information and options were available to you at that time?

What made the task easier or harder? What had changed from ordinary work?

What controls or checks were available? How did they work in these conditions?

Which details did you observe yourself? Which did you learn afterward?

What are you uncertain about? Who or what could help us check?

Listen without filling gaps. Ask one question at a time. Avoid leading questions and blame language. Preserve uncertainty; do not pressure someone to estimate a detail they cannot recall.

3 Close and confirm

Summarize the account and invite corrections. Ask what was missed and how to make later corrections. Explain the next steps, contact route, and any agreed follow-up. Record unresolved differences rather than forcing agreement.

Corrections / follow-up contact / agreed next step:

Interview Notes and Verification Record

Case ID: _____ Participant reference: _____ Interviewer: _____

Interview date / time / zone: _____ Notes version / secure location: _____

Use a participant reference here; keep identity details in the approved case record. Mark quotations only when accurately captured. Label summaries and interpretations explicitly.

Sequence / detail Time basis / uncertainty	Participant account Quote or summary	Knowledge basis Observed / learned later	Corroboration / difference Source reference / open gap	Next check / owner Due date / outcome

Interviewer interpretation / alternative explanation (keep separate from the account):

Participant corrections / unresolved differences / confirmation method and date:

Follow-up contact / owner / date: _____

This sheet is an aid, not a complete interview protocol. Respect applicable rights, representation, recording rules, and organizational requirements. Secure the notes and retain them under the approved case process. Make extra copies as needed.