

# COVID-19 BEST PRACTICES:

## Virtual Investigations

What are some best practices you can share for conducting investigations virtually (or when working from home)?

Every week, we're asking our community of employee relations experts for guidance. Here's this week's poll and highlights of what we heard.

### Virtual investigations are commonplace today.

*"We conduct a lot of investigations virtually and use the same process we use when we do in-person investigations."*

### Use technology like video conferencing to its best advantage—and see the interviewee whenever possible.

*"We determine which technology method will work best based on their equipment. We are lucky that we have multiple types of video or phone conferencing options. Voice only would be a last resort—our preference is to be able to see the interviewee. We also make sure that they are in a confidential space before proceeding and we send a follow up email."*

*"I use a split screen for the video chat window and my notes window; this way, I am able to look directly at the witness and type my notes at the same time."*

### Acknowledge any limitations or awkwardness upfront.

*"We do remote investigations regularly... I have just been acknowledging the increased awkwardness/unusualness of the current situation, and letting people know in advance that interruptions from pets/kids/household noises are expected and not a problem (on either side). Otherwise, business as usual."*

*"Try to have a designated quiet area. But given the possibility of children being home from school/daycare, explain that there may be some background noise."*

### Confirm policies (e.g., around note-taking/recording)

*"Depending upon the issue, we may identify an objective member of management to act as witness and interpret physical cues. For subjects that do not lend themselves to witness, we ensure the person is in a private space where s/he can speak freely without concern for interruption (work coverage). We review our policy against audio/video recording and confirm compliance, explain that notes will be taken and may require occasional "catch up" pausing and if background noise is anticipated disclose it upfront."*

*"We conduct the majority of our interviews virtually. We always confirm that we are not recording and inform them that they are not to record either."*

### Ensure privacy.

*"We conduct many of our interviews virtually and have had good luck doing so. We always ensure that witnesses are in a private location where they are comfortable discussing confidential matters. We also ask witnesses if anyone can overhear the conversation. Lastly, we tell witnesses to feel comfortable letting us know if someone walks up and they feel uncomfortable continuing."*

### Show empathy.

*"Remember to use your voice to show calmness, empathy and to build a connection with the person you are interviewing."*

Looking for more best practices and guidance around managing employee issues related to COVID-19?

Visit the [HR Acuity COVID-19 resource center](#).