Configuring Workplace Investigations

Workplace Investigations

Welcome to the Course Configuration Guide. The purpose of this resource is to provide useful information for administrators to understand what all the options are to customize their EVERFI courses. Whether every single page is used or just one, it is important that learners are receiving the most up-to-date and relevant information they need.

Each EVERFI course has standard configuration options while newer, updated courses have additional fully-configurable pages throughout the content. These options allow you to tailor the learning experience to your unique organization. Not only will this impact the aesthetic, but it will also help the content resonate more with participants and build trust knowing their organization put thought and intention into the training.

We recommend reading through and printing out the full guide to understand the course learning objectives and to plan what content you want to use at your organization. There are suggestions from our subject-matter experts throughout the guide and areas to make notes and collaborate with other colleagues or departments who may have content to contribute.

What you can find in this guide:
1. Configurations Layouts
2. Course Overview
3. Course Map
4. Configuration Options per Module

Configurations Layout: Welcome to the Course page

Important to note: All elements per page (Title, Body Text, and Image) must be included in order for the page to populate in the course. If an element is not included, then the entire page will be removed.

1. Title

The title appears in the top left corner of the configurable page just below the navigation bar.

We recommend having no more than 6 words that summarize the content below.

2. Body Text

This open text field is positioned under the Title on the left half of the page.

There are specific content suggestions in the following pages for this specific course and where it occurs in the experience.

3. Image

Images appear in the top right corner of the page.

Using your organization's imagery here goes a long way. Forgo the stock photos if you can and upload familiar faces and places your learners will recognize.

1 — Sample Custom Page Title

3

2 — This page can be used to provide custom information to employees of your organization.

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Configurations Layout: Video Page

Important to note: All elements per page (Title, Body Text, and Video) must be included in order for the page to populate in the course. If an element is not included, then the entire page will be removed.

1. Title

The title appears at the top of the configurable page just below the navigation bar.

We recommend having no more than 6 words that summarize the content below.

2. Body Text

This open text field is positioned under the Title and spans the full length of the page.
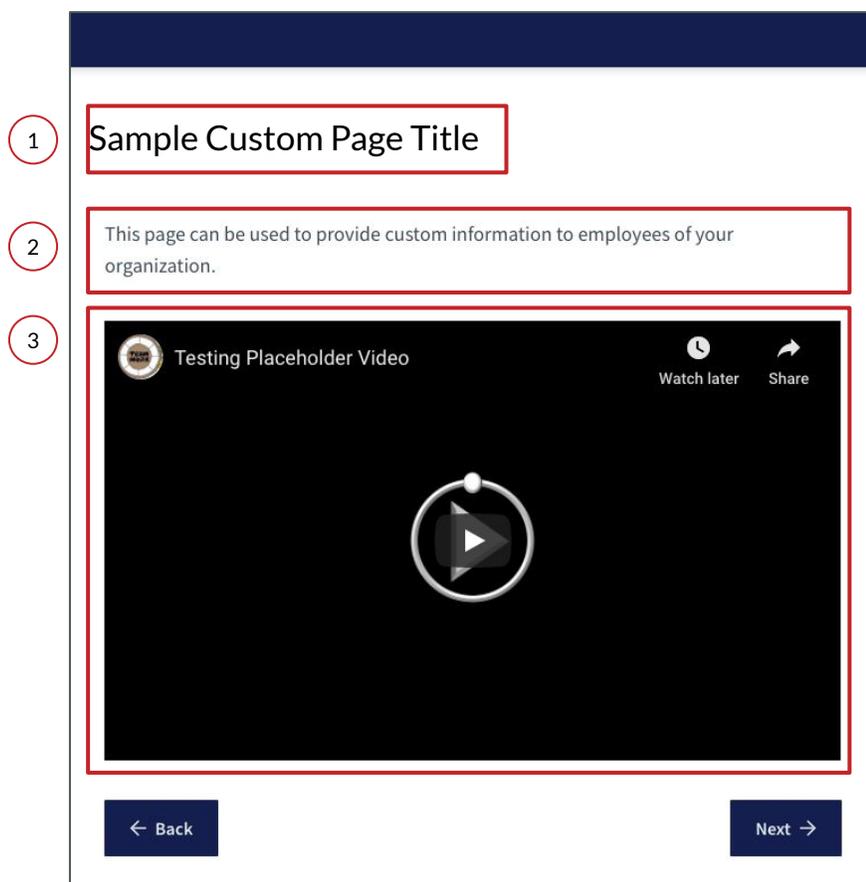
There are specific content suggestions in the following pages for this specific course and where it occurs in the experience.

3. Video

Uploaded videos appear below the Body Text.

Requirements:
- YouTube URL input
- Use the highest quality possible (HD)
- Quality adjusts per connection speed
- Enable Closed Captioning

① **Sample Custom Page Title**

② This page can be used to provide custom information to employees of your organization.

③ Testing Placeholder Video — Watch later — Share

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Configurations Layout: Policy / Resource Page

1. Policy / Resource Title

Add the name of the specific policy or resource in this field. This appears in the content page and in the course navigation menu.

To configure this element go to the Policies or Resources sections of the Admin Dashboard or through the Configurations menu.

2. Policy / Resource

This is where you attach your specific policies or resources for learners to access and e-sign (for policies only). For the policy in this course, it will appear on the content page within the course. For the resource, they will appear in the navigation window.

Some courses have the option to include multiple documents or web pages which will be indicated in the following pages. We strongly recommend using a URL for easy maintenance.

Custom: Insert Your Title

This page can be used to provide custom information to employees of your organization.

1 **Example Policy**

Review before e-signing

2 **View Policy**

I hereby acknowledge that I have reviewed and understand this policy

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Workplace Investigations

Course Overview

This course teaches supervisors how to promptly conduct investigations upon learning of problems. Supervisors will gain knowledge to go forth and confidently conduct investigations in the workplace.

Learning Outcomes

In this course, employees will learn how to
- Explain the importance of workplace investigations and identify when investigations are appropriate
- Identify best practices to plan for an investigation and explain the importance of documentation
- Recognize the pros and cons of different types of investigators
- Identify interviewing guidelines and recognize common problems to avoid
- Explain the different sensitivities to keep in mind when interviewing different involved parties
- Identify how to make credibility determinations
- Identify necessary sections in an investigative report
- Identify and implement steps to implement the final decision resulting from an investigation
- Recognize the guiding principles to designing disciplinary measures for those who have violated company policy and implement the steps to provide appropriate remedial action for victims

Course Details

- **Audience:** Supervisors
- **Course Length**: 45 minutes
- **Mobile-Friendly:** Compatible with desktops, tablets, and mobile devices

Course Map

Module 1: Introduction
- Introduction
- Standard Custom Page*
- Custom Video Page*

Module 2: The Investigation Mandate
- The Investigation Mandate
- Fact Finding
- What Prompts Investigations
- Unwritten Rule
- Don't Investigate Certain Protected Activities
- Characteristics of Effective Investigations
- Respecting Rights
- Objection Noted
- Standard Custom Page*
- Standard Custom Page*
- Summary

Module 3: Planning the Investigation
- Planning the Investigation
- Best Practices for Planning
- Importance of Documentation
- Provide Interim Relief
- Fred Shreds
- Choosing Investigator(s)
- Pick a Pro
- Pick a Pro
- Pick a Pro
- Investigate Techniques
- Standard Custom Page*
- Summary

Module 4: Initiating the Investigation
- Initiating the Investigation
- Interviewing Guidelines
- Interview Process
- Bad Questions
- Bad Questions
- Bad Questions
- Interviewing the Person Harmed
- Interviewing Witnesses
- Interviewing The Suspect
- Problems to Avoid
- Review Documents and Physical Evidence
- Making Credibility Determinations
- Finalizing Report
- Reaching a Conclusion
- Standard Custom Page*
- Summary

Module 5: Implementing the Decision
- Implementing the Decision
- Informing Involved Parties
- Discipline for Policy Violators
- Picking Punishment
- Remedial Action
- Follow Up
- Policy Acknowledgement*
- Summary

* indicates a configurable page

Course Map (cont.)

Module 6: Work Schedules
- Conclusion
- Policy Acknowledgement*
- Policy Acknowledgement*
- Policy Acknowledgement*
- Custom Resource Page*
- Custom Resource Page*
- Custom Resource Page*
- Standard Custom Page*
- Custom Video Page*
- **Course Complete**

Module 1: Introduction

Topics:
- Introduction to the topic of workplace investigations

Learning Objectives:
- Start the course with an understanding of what to expect topically

Configuration Name	Layout	Suggested Content
Welcome Letter Page 2 ● Custom Page Title ● Custom Page Text ● Custom Page Image	**Standard Page**	● Introduce the course topic and learning objectives ● Set expectations, goals, deadlines ● Contact info for EVERFI tech support and an organization contact ● Use an image of recognizable people or places (CEO, Head of HR, co-workers, working space) ● Image Dimensions: ● 575px H by 495px W
Welcome Video Page 3 ● Custom Page Title ● Custom Page Text ● Custom Page Video	**Video Page**	● This page can be used in place of the Welcome Message ● Use any existing videos you have or create a quick talking head interview with Executives ● Keep the video short, 30-45 seconds ● Video upload must be a YouTube URL with Closed Captioning

Module 2:
The Investigation Mandate

Topics:
- Fact Finding
- Protected Activities
- Characteristics of Effective Investigations

Learning Objectives:
- Explain the importance of workplace investigations
- Identify when investigations are appropriate

Configuration Name	Layout	Suggested Content
Page 9 ● Custom Page Title ● Custom Page Text ● Custom Page Image	**Standard Page**	● Highlight specific examples and situations for your employees to prompt an investigation; on the flip side showcase examples of protected activities at your organization
Page 10 ● Custom Page Title ● Custom Page Text ● Custom Page Image	**Standard Page**	● Reiterate commitment to a safe, healthy, and inclusive work environment that respects individuals' rights ● Include a retaliation statement ● Outline your company's policy for investigations ● List any resources, contacts or additional information your organization may have for learners to reach out to about your policies

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Module 3:
Planning the Investigation

Topics:
- Best Practices for Planning
- Importance of Documentation
- Choosing Investigators

Learning Objectives:
- Identify best practices to plan for an investigation
- Explain the importance of documentation
- Recognize the pros and cons of different types of investigators

Configuration Name	Layout	Suggested Content
Page 11 ● Custom Page Title ● Custom Page Text ● Custom Page Image	**Standard Page**	● Explain your organization's intentions and best practices implemented for a smooth investigation ● Create a downloadable cheat sheet of what to document if prompting an investigation and what to consider ● What is your company's policy and process to hire investigators ● Highlight legislation and regulations your employees should specifically be aware of

Module 4:
Initiating the Investigation

Topics:

- Best Practices for Investigating
- Interviewing Guidelines and Process
- Problems to Avoid
- Determining Credibility
- Finalizing Report
- Reaching a Conclusion

Learning Objectives:

- Identify interviewing guidelines and implement the interview process
- Recognize common problems to avoid
- Explain the different sensitivities to keep in mind when interviewing different involved parties
- Identify how to make credibility determinations and necessary sanctions in an investigative report

Configuration Name	Layout	Suggested Content
Page 16 ● Custom Page Title ● Custom Page Text ● Custom Page Image	**Standard Page**	● Create a cheat sheet or checklist using the EVERFI content to download of: 　○ the process to interview 　○ sample good vs. bad questions 　○ sample effective questions 　○ things to avoid 　○ what to include in a report ● Create versions for those suspected, for those who were harmed, and bystanders ● Remind to stick to the facts ● Provide additional resources to learners on how to ask non-leading questions and anti-bias courses

Module 5: Implementing the Decision

Topics:

- Informing Involved Parties
- Disciplining Policy Violators
- Remedial Action
- Follow Up

Learning Objectives:

- Identify and take the steps to implement the final decision resulting from an investigation
- Recognize the guiding principles to designing disciplinary measures for those who have violated company policy
- Identify and implement the steps to provide appropriate remedial action for victims

Configuration Name	Layout	Suggested Content
Page 7 ● Custom Page Title ● Custom Page Text ● Custom Page Image	**Standard Page**	● Explain your organization's disciplinary process and what the follow-up will be to all parties ● Reiterate your retaliation policy ● Link to relevant resources, such as an employee handbook or contact at your organization to reach out to with more questions

Module 6: Work Schedules

Topics:
- Review of concepts
- Organizational messages

Learning Objectives:
- Review and acknowledge organizational policies and resources

Configuration Name	Layout	Suggested Content
Page 2 ● Custom Page Title ● Custom Page Text ● Custom Page Policy	**Policy Page**	● Use the policy name or other clear call-to-action for learners to e-sign the policy ● Outline context and company expectations to adhere to the policy ● Reiterate protocol if there is suspicious activity, violation of policy, and how to report ● Provide organization point of contact in case of questions ● Upload 1 policy per page ● Using a URL makes it easier to be sure they are up to date for participants ● Any page without a policy will not appear in the course for the learner
Page 3 ● Custom Page Title ● Custom Page Text ● Custom Page Policy	**Policy Page**	
Page 4 ● Custom Page Title ● Custom Page Text ● Custom Page Policy	**Policy Page**	

Configuration Name	Layout	Suggested Content
Page 5 ● Custom Page Title ● Custom Page Text ● Custom Page Resource	**Resource Page**	● These pages can be used to compile any additional resources you want learners to review in summary of the course ● Add links to existing guidance, resources, contact information that are updated in real time
Page 6 ● Custom Page Title ● Custom Page Text ● Custom Page Resource	**Resource Page**	● Quick guide or checklist they can download to easily remember how to identify red flags and when to report ● Reporting channels and protocols; anti-retaliation statement
Page 7 ● Custom Page Title ● Custom Page Text ● Custom Page Resource	**Resource Page**	● Employee handbook, repercussions if found in violation ● Using a URL makes it easier to be sure they are up to date for participants
Page 8 ● Custom Page Title ● Custom Page Text ● Custom Page Image	**Standard Page**	● A closing message for learners ● Have the letter come from the CEO, other leadership, or the person who wrote the Welcome Letter ● Reiterate the goals and takeaways of the experience, community expectations ● Use an image of recognizable people or places (CEO, Head of HR, co-workers, working space) ● Stay away from using stock images

Page 9
● Custom Page Title
● Custom Page Text
● Custom Page Video
	Video Page	● A closing message for learners
		● Have the letter come from the CEO, other leadership, or the person who wrote the Welcome Letter
		● Reiterate the goals and takeaways of the experience, community expectations
		● Requirements:
		  ○ Needs to be a Youtube Video
		  ○ Enable Closed Captioning

EVERFI, Inc. is the leading education technology company that has revolutionized prevention and compliance training online through its industry-leading courseware and technology. EVERFI educates employees on important skills relating to harassment, diversity and inclusion, culture, ethics, code of conduct and data security. Courses are built by a team of attorneys, prevention experts, and instructional designers who ensure that EVERFI's prevention and compliance courses are aligned with applicable law and research-based best practices. Our industry leading instructional design and subject matter expertise demonstrates our commitment to the core issues behind critical topics that are at the center of healthy workplace culture.

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Learn more about EVERFI Conduct & Culture at www.everfi.com/wcn