

INVESTIGATIONS

CHRONOLOGY/TIMELINE - EXAMPLE

Anja came to you on Monday to say that 5 days ago she hurt her back while manually transferring a patient (the hoist lift was out of commission again). Anja did not want to report it because of all the forms that have to be filled out; and she is concerned because last time she injured herself the manager grilled her on her competency in proper body mechanics and seemed to blame her for the incident and make her feel incompetent. Further, the manager complained that she should not have reported the injury to WSBC for such a minor injury (Anja was off for 3 days recuperating from a shoulder sprain). Now Anja is asking you for advice and what she should do since her doctor told her on Saturday that she should take time off from work while investigating the cause of her lower back pain.

CHRONOLOGY – place as much specific information (facts/statements) as you can in chronological order; requesting as much detail as possible. Often you need to fill in the blanks; but do so with evidence versus hearsay (i.e.: if you are told something was discussed in a staff meeting – note this statement, but then request meeting minutes or speak to other meeting attendees for confirmation of the facts).

Here is a sample of the above information in a Chronology (statement of facts) as the investigation begins:

A long time ago – Staff meeting where concerns about floor lift breaking down first documented.

Some time ago – Anja hurt herself on the job and received a shoulder sprain (floor lift working but only down button working so had to manually crank lift in upward direction).

Some time ago – Anja reported shoulder sprain to WSBC.

Certain dates from XX to XX – Anja was off work due to workplace shoulder injury.

Some time ago – Employer had floor lift electronic controls repaired.

Some time ago – Staff concerned brakes not working well on floor lift and reported to employer.

Some time ago – Anja reported back to work with medical clearance.

Some time ago (could be same date as above) – Anja was called in by manager to discuss her report to WSBC.

Monday (last week) – Employer advised staff floor lift not to be used until brakes repaired and to borrow lifts from other units UFN.

Wednesday (last week) – Anja completed manual transfer with patient X at XX o'clock after discovering the floor lift was still not working.

Monday (this week) – Anja met with you about lower back injury from workplace injury.

INVESTIGATIONS

CHRONOLOGY/TIMELINE - EXAMPLE *continued*

TIPS: LIST WHAT YOU ALREADY KNOW IN CHRONOLOGICAL ORDER

- > Decide what is helpful to find out (these unknowns are blanks placed in the timeline and filled in later).
- > Strategize where you would obtain missing information/evidence from. (who would you talk to? What documents would you seek and where would you get them from?)
- > REMINDER: be factual versus relying on hearsay!

Here is an example of what the prior chronology may look like after investigating

(Note some items change order upon substantiation):

February 13, 2015 (Friday) – Staff meeting where concerns about floor lift breaking down first documented. *Minutes provided.*

February 23, 2015 (Monday) – Anja hurt herself on the job and received a shoulder sprain (floor lift working but only down button working so had to manually crank lift in upward direction).

February 24, 2015 (Tuesday) – Anja reported shoulder sprain to WSBC. *Copy of report provided.*

February 24–27, 2015 (Tues-Fri) – Anja was off work due to workplace shoulder injury.

March 2, 2015 (Monday) – Anja reported back to work with medical clearance. *Copy of medical documentation provided.*

March 2, 2015 (Monday @ 1500 of 0700–1500 shift) – Anja was called in by manager to discuss her report to WSBC. Notes from Anja's recollection of meeting written June 10, 2015 provided.

April 2, 2015 (Thursday) – Employer had floor lift electronic controls repaired. *Log from dated notes provided.*

May 10, 2015 (Saturday) – Staff concerned brakes not working well on floor lift and reported to employer. Subsequent reports made weekly at staff meeting with employer feeling lift still usable as is. *Staff meeting minutes from May 15, 22 & 29, 2015 provided.*

June 1, 2015 (Monday) – Employer advised staff floor lift not to be used until brakes repaired and to borrow lifts from other units UFN. *Employer memo dated May 29, 2015 provided.*

June 3, 2015 (Wednesday) – Anja completed manual transfer with patient G Smith at 1100 after discovering the floor lift was still not working and no other lifts were available. G Smith did not usually require a mechanical lift as she was weight bearing; but was unwell and requested assistance to the toilet. *Charting from file unavailable from employer, no notes from Anja.*

June 8, 2015 (Monday) – Anja met with you about lower back injury from workplace injury. *Steward notes from meeting provided.*