

Investigatory Meetings

My manager wants to meet with me. Help!

To arrange the help of a local unit officer, call **Voice Tel at 1-866-305-5612**

Not everyone has had to endure the unfortunate process of being called into Management's office, or asked to meet in HR, but for many, this is a time to be concerned. A time which may leave you confused as to why?

Things to keep in mind when this happens:

1. It's always best to ask your manager (or whoever is making the meeting request) what the meeting could be about. You may have a gut inclination, or you may not. Either way, don't skip on the ability to know. You are entitled to have a reasonable idea as to what will be discussed. This could be a generalization of the circumstances, the date it occurred and/or a general sense of the issue. This is not a complete list of what to ask for, but gives you place to start in making your request for information. Keep it to email. It will be documented this way, and you will have something to pass along to your Nurse Rep or Officers should you need to.
2. Union Representation at the meeting should be granted if the nurse makes the request, and the meeting could potentially lead to discipline in anyway. This is known as invoking your "Weingarten Rights", which is a federal law affording you the right to union representation. Unless the nurse is advised by Management to call their rep, you must say *"If this discussion could in any way lead to my being disciplined or terminated, I respectfully request that my union representative be present at this meeting. Without representation present, I choose not to participate in this discussion."*
3. Next, your manager, or HR may approach you with a date to meet for the investigatory meeting. In the event you chose to take someone with you for representation (a WSNA Officer or Nurse Rep) be sure to include them in the scheduling process. We want to make sure someone will go with you. To arrange the help of a local unit officer, call **Voice Tel at 1-866-305-5612**. **If you have been taken off of the schedule, and not allowed to come to work, email your WSNA Nurse Rep Jaclyn Smedley BSN, RN at jmedley@wsna.org right away.**
4. Once the meeting date is arranged refer all of your pending questions to the rep who is going with you. Do not talk to anyone about the meeting, or any surrounding circumstances with others aside from your rep.

The day of the meeting:

1. This can be a stressful time, especially if you still don't know what the meeting could be about. Allow your rep to guide you in the process.

Key ideas to remember:

- a. Stick to the facts. Don't speculate and be truthful.
 - b. Don't say more than is needed. Answer questions with "yes", "no", "I can't recall" whenever possible.
 - c. Elaborate only where necessary but do not second-guess yourself out loud.
 - d. Do not answer speculative questions such as "if you were in this situation how would you handle...?"
 - e. Be sure to have a clear idea of the question, before offering your answer. Sometimes questions can be broad, or leading. If you can't provide a targeted answer, ask your rep for help in getting you there. It's okay to ask them to repeat or rephrase.
 - f. Be sure to act professional and courteous. It's okay to cry.
 - g. Take a break! It's generally okay to take a pause during an investigatory meeting, or what is called, a "caucus". This can allow you a chance to take a breath, or consult with your rep. Either you or your rep can make this request.
2. Will I be disciplined? Technically, a nurse should not be disciplined at the conclusion of an investigatory meeting. If management chooses to discipline a nurse, that may come later. If you are presented with a discipline at a later time, and you do not agree with the contents of it, sign "In receipt only" next to your signature. This shows you have received the information, but you don't necessarily agree with it.

What's next?

Any level of formal discipline can be challenged through the grievance process. To find out what this looks like, your Local Unit Officers or Nurse Rep can help describe it to you. To reach your rep, email jmedley@wsna.org with the details of the situation, and if possible, include a copy of the discipline at the time of the email. This will help to facilitate the process and conversation. **REMEMBER timelines are very important.** A nurse must file a grievance (with the help of the Nurse Rep) within 15 calendar days from the point when the nurse was harmed.