Guidance on Conducting Virtual and Hybrid Interviews

This document provides guidance for providers when planning for

- Virtual interviews taking place prior to the site visit
- Hybrid interviews during site visits when team member(s) and/or stakeholder(s) participate in person and virtually

Setting Up Virtual and Hybrid Meetings

The provider is responsible for scheduling meetings/interviews (using their preferred virtual platform) and for sending invitations to stakeholders and review team members.

- Be sure to check audio and visual equipment to ensure a clear communication channel among all parties, whether joining virtually or in person.
- The virtual platform’s chat box feature should not be used (or should be disabled) during meetings to avoid capturing private comments on the provider’s platform.
- Meetings and interviews conducted as part of an AAQEP review should not be recorded.
- Be sure to secure and share a phone number for someone who can troubleshoot any technical issues that arise with the provider’s platform.

At the Start of the Meeting

Unless the provider is a participant in a particular meeting/interview, the provider needs to transfer host privileges to a review team member so that the provider can leave and the meeting can continue privately.