

Financial Abuse Allegation, Home Visit: Alleged Perpetrator Interview Video Discussion Guide

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APSWI Video- Financial Abuse, Alleged Perpetrator Interview Video Discussion Guide

Objective:

This video discussion guide is designed to facilitate learning and enhance interviewing skills using the Adult Protective Services Workforce Innovations (APSWI) training video: [Financial Abuse Allegation, Home Visit: Alleged Perpetrator Interview](#)

How to Use:

May utilize category or stand-alone questions.

Supervisors and learning facilitators can use this video discussion guide to complement the learning experience from the [Financial Abuse Allegation, Home Visit: Alleged Perpetrator Interview](#). This can include facilitating conversations, encouraging critical thinking, and enhancing investigation skills when conducting home visits and interviewing alleged perpetrators and clients.

This guide can be used during instructor-led training, onboarding, unit meetings, or individual supervision/coaching.

Suggested use: with staff, watch the 7:36-minute video portraying an APS professional interviewing an alleged perpetrator of financial exploitation.

- The video discussion questions are categorized based on skill areas needed for the practice of APS.
- Exploration questions and possible answers are provided. Adding your expertise and applying your organization's policy is encouraged.
- Allow for discussion on what participants might do differently.

Content Warning:

We recognize that APS work is both challenging and rewarding and APS professionals are whole human beings who have their own experiences before and during APS work. Questions and discussion may activate feelings based on personal or professional experiences, including vicarious trauma, and we encourage everyone to do what they need to do to safely engage in these discussions.

General Questions to Start the Discussion

- What did you like and/or dislike about the APS professional's (Erin) approach?
- What do you think of her opening statement to the alleged abuser (Jackie)? What would you have said or done differently?

Soft Skills- Rapport Building

- Jackie was defensive with Erin almost immediately. What techniques did Erin use to defuse that defensiveness? What are some other techniques she could have tried? Ask your learners: How would they have responded to Jackie's statements at the beginning of this interview?

Possible answers: *Further explain the APS program as well as your role, including your mandate to ensure the client's (Larry's) safety and well-being. Share penal code 368 (elder abuse laws) information with Jackie. Address her defensiveness directly—"you seem to be uncomfortable talking about this, but I am obligated to assess Larry's welfare and safety" and/or "I'd like to give you the opportunity to discuss this matter with me and share your perspective, but if you don't want to talk that's ok" (or I'll excuse myself). Reiterate it is the person's choice to speak with you, but your investigation into the matter will continue whether they cooperate or not.*

- What are some of the ways Erin tried to build rapport and relate to Jackie?

Possible answers: *Erin retained a neutral, friendly demeanor throughout the conversation. Through body language—she made eye contact, nodded, and conveyed that she was actively listening and engaged in the conversation. She acknowledged and validated Jackie's feelings about the visit and interview being perceived as intrusive. (Jackie accused Erin of being "nosy as hell" "just like everyone else in the government"). Erin shared a common interest with Jackie, e.g. "Pottery Barn is one of my favorites."*

Investigative Skills

- The trainer can point out the first few questions Erin asked Jackie, and explore which techniques were effective and why.

Possible answers/points of discussion: *Erin began by asking Jackie what the arrangement is between her and Larry, and probed further to find out what was said and what Jackie's understanding of it is. ("What is the arrangement between you and Larry"? "What do you think he meant by that?") These are simple, open-ended questions that don't project judgment or blame. *This can also be an opportunity for learners to share what investigative questions have been effective for them. **

- What other questions could Erin have asked? What information would an APS professional try to obtain for their investigation? You may ask your learner what they would do if an alleged abuser refused to show them financial records pertinent to the investigation.
- Aside from the financial transactions, what other signs of possible exploitation are apparent in this situation?

Possible answers/points of discussion: *Erin asked Jackie how she and Larry met, which is a good way to obtain information about the nature of their relationship. Other possible questions could be focused on whether Erin considers herself Larry's caregiver. Are they romantically involved? It's revealed that Jackie purchased furniture for herself with Larry's debit card. Did she agree to repay Larry for this purchase? Jackie makes a statement about Larry not always being able to remember things. Could Larry possibly be experiencing some cognitive decline? Is he vulnerable to undue influence?*

More Soft Skills- Defusing Hostility, Safety Awareness

- Jackie became increasingly hostile, particularly when certain subjects were brought up during the interview. What do you think is behind Jackie's hostile behavior?

Possible answers/points of discussion: *This could be Jackie's attempt to intimidate the worker and stop her from asking questions. Jackie may be feeling guilt, embarrassment, or possibly both. It is also possible that Jackie is sensitive or worried about how her actions could be perceived. *This could be an opportunity for the learners to discuss a difficult interview they've had or how they've dealt with anger and/or defensiveness from clients as well as alleged abusers.*

- What would you have done if an alleged abuser pointed their finger at you as portrayed in the video? Would you have continued with the interview? What are your thoughts about Erin's approach to de-escalating Jackie? What are some other ways/strategies to defuse hostility?

Possible answers: *Take a pause, stop speaking until it appears the other person has released their frustration, express empathy, redirect the topic, and revisit later. Practice active listening—summarize the person's points and repeat them back. E.g. "so what I hear you saying is..." Validate any legitimate frustrations or difficulties. The facilitator can discuss how Erin demonstrated these actions. Discuss Erin's statements and body language when Jackie pointed at her. Engage learners in a discussion about their safety and how and/or when to end an interview if an alleged abuser or client remains or becomes increasingly agitated and if the situation feels unsafe.*

Impact of Interview/Possible Follow-Up Questions

- What information was Erin able to obtain from this interview? What would be your next step after this interaction with Jackie?
- Based upon this interview with Jackie, what questions would you want to ask Larry if and when you meet with him again?

Possible answers: *Have you ever felt intimidated by Jackie's behavior? How did Jackie gain access to your debit card? Would you explore the client's cognitive functioning and/or ask if he's had any concerns or issues with his memory? Would you assess the client's medications to see if any are prescribed for neurocognitive disorder or cognitive decline?*

- **Bonus Question:** *What tools does your organization use to assess cognitive status?*
- What kinds of education and/or resources would you want to provide to a client in this situation?

Possible answers: *Educate client on the prevalence of financial abuse amongst older adults. Discuss the dangers of giving someone access to a debit card and/or banking information. Educate the client on financial abuse "red flags," such as someone asking to be added to their bank account(s), estate planning documents, or to assets such as their home. Discuss other common behaviors abusers will employ such as isolating the client from friends and/or family, and other forms of manipulation.*

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