FILLABLE TEMPLATE KIT



The Phenomenology & IPA Template Kit

58 fillable templates · US Letter & A4 · type, save, print

The companion kit to the workbook shown above. It contains the templates only. The chapters and the completed examples are in the book.

Rafiq Muhammad, MD, MIHMEP, PhD · Kit Edition 1.0 · 2026 · KIT-WB08

How to use this kit

This kit contains every fill-in template from *The Phenomenology & IPA Research Workbook*, one per page, in the order you will use them. Each page tells you in a few lines how to fill it in.

> **On screen:** open the PDF in Adobe Acrobat Reader (free), Microsoft Edge, Google Chrome or macOS Preview. Click any white box and type; boxes grow to more lines where answers are long. Tick boxes with a click. **Save often** (Ctrl/Cmd + S) — your answers stay in the file.

> **On paper:** print any page; every box is sized for handwriting.

Working with a supervisor? Each template ends with a sign-off line, so you can bring pages to meetings as they are done.

First time doing this? The kit gives you the tools; the workbook teaches the method. *The Phenomenology & IPA Research Workbook* explains every template and shows a completed example of each one, built around a single study from start to finish.

The workbook, with a completed example of every template: https://www.gradsummit.com/workbooks/phenomenology-ipa-research-workbook/

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Template map

58 templates in the order the workbook uses them. Click a row to jump to it; tick **Done** as you finish each one.

#	Template	Page	Done
Chapter 1 · What Phenomenology Is (and Which Phenomenology)			
1.1	Is This a Phenomenological Study? Diagnostic	7	☐
1.2	Descriptive vs. Interpretive Decision Sheet	8	☐
1.3	Phenomenological Approach Selector	9	☐
1.4	Philosophy-to-Method Alignment Check	10	☐
1.5	Phenomenology Vocabulary Decoder	11	☐
Chapter 2 · Designing a Phenomenological Study			
2.1	Phenomenological RQ Builder	12	☐
2.2	Phenomenon Definition & Boundary Sheet	13	☐
2.3	Homogeneous Sampling Plan (Idiographic)	14	☐
2.4	Sample-Size Rationale (Phenomenology)	15	☐
2.5	Sensitive-Topic Ethics & Care Plan	16	☐
Chapter 3 · Epoché & Bracketing: Managing the Self			
3.1	Epoché / Bracketing Journal Pages	17	☐
3.2	Assumptions & Pre-Understandings Inventory	18	☐
3.3	Bracketing-by-Approach Guide	19	☐
3.4	Ongoing Bracketing Log	20	☐
Chapter 4 · Phenomenological Interviewing & Data Collection			
4.1	Phenomenological Interview Guide Builder	21	☐
4.2	Concrete-Description Probe Card	22	☐
4.3	Lived-Experience Account Capture	23	☐
4.4	Interview Reflexivity Note	24	☐
Chapter 5 · First Engagement: Immersion & Reading			
5.1	Immersion & Whole-Reading Log	25	☐
5.2	Initial Noting / Exploratory Comments Sheet (IPA)	26	☐
5.3	First-Impression Memo	27	☐
5.4	Listening / Re-reading Reflexivity Note	28	☐
Chapter 6 · Significant Statements & Meaning Units			
6.1	Significant-Statement Extraction Sheets	29	☐
6.2	Horizonalization Worksheet (Moustakas)	30	☐
6.3	Meaning-Unit Delineation Sheet (Giorgi)	31	☐
6.4	Formulated-Meaning Worksheet (Colaizzi)	32	☐
6.5	Experiential-Statement Sheet (IPA)	33	☐

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CHAPTER 2 · DESIGNING A PHENOMENOLOGICAL STUDY

2.5 Sensitive-Topic Ethics & Care Plan

Purpose: Build a working protocol that protects participants — and you — when interviews touch distressing material.

Estimated time: 30–40 min

Completed example: Template 2.5 in The Phenomenology & IPA Research Workbook.

How to fill this in

1. Name the specific distress risks your phenomenon carries — be concrete, not generic.
2. Write your in-interview response: how you check in, pause, offer a break, or stop; the participant's cue to stop.
3. List real support resources to signpost (helplines, charities, counseling) — local and specific.

Element	Guidance	Your Plan
Distress risks	What might be hard?	
In-interview response	What you do in the moment.	
Support resources	Where to signpost.	
Consent & withdrawal	Ongoing, revocable.	
Debrief & researcher care	After the interview.	

Output: A working sensitive-topic care plan — the protocol that protects participants and you, satisfies the ethics board, and lets you respond well when an interview touches something raw.

Supervisor sign-off	Date	Comments

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CHAPTER 5 · FIRST ENGAGEMENT: IMMERSION & READING

5.2 Initial Noting / Exploratory Comments Sheet (IPA)

Purpose: Comment on the transcript line by line at three levels — descriptive, linguistic, and conceptual.

Estimated time: 60–90 min per transcript

Completed example: Template 5.2 in The Phenomenology & IPA Research Workbook.

How to fill this in

1. Take the transcript in small segments; comment on each at all three levels.
2. Descriptive: what is the content — what is she describing? Stay close and plain.
3. Linguistic: how is it said — metaphor, repetition, pauses, pronouns, where language strains?

Transcript Extract (P1)	Descriptive	Linguistic	Conceptual

Approach Track — what is this first close pass called, and how do I do it?

IPA (interpretive)	Descriptive (Giorgi · Colaizzi · Moustakas)	van Manen (hermeneutic)
Initial noting — exploratory comments at three levels (descriptive, linguistic, conceptual), line by line.	Not a line-by-line commentary: grasp the sense of the whole, then delineate meaning units (Ch. 6).	Thematic reading — dwell and highlight phrases that speak to the phenomenon; reflect in writing.

Output: A richly noted transcript at three levels — the exploratory raw material from which experiential statements (Ch. 6) and emergent themes (Ch. 7) will be drawn. The signature first-analysis artifact your supervisor will want to see.

Supervisor sign-off	Date	Comments

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End of the sample

This sample shows 2 templates: 2.5 Sensitive-Topic Ethics & Care Plan; 5.2 Initial Noting / Exploratory Comments Sheet (IPA).

The full The Phenomenology & IPA Template Kit has 58 fillable templates, each on its own page, with the template map, bookmarks and a Done box for every template, in US Letter and A4.

You can buy the full kit on the page where you downloaded this sample.

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