

Managing Intake/I&R

Presented By:

Mark McWilliams, I&R Director

Michigan Protection & Advocacy Service, Inc.

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John Ramsey, Intake Supervisor

Disability Rights Ohio

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At 3-4:30 ET 2-3:30 CT 1-2:30 MT 12-1:30

An Excellent Intake Specialist Is:

- Ethical- Complies with the applicable Rules of Professional Conduct.
- Courteous- Treats callers and others with respect and attention to their needs.
- Thorough- Gathers accurate and complete intake information, and completes assigned tasks correctly.
- Helpful- Assists callers by providing accurate and meaningful information and referral.
- Efficient- Performs intake functions with reasonable speed without sacrificing performance.

Data Collection

Generating or bringing together information that has been systematically observed, recorded, organized, categorized, or defined in such a way that logical processing and inferences may occur.

Data Collection Cont.

- Callers Name & Address
- Contact Information
- Callers concern
- Disability
- Important dates related to situation

Data Collection Opportunities

- Background for Frequent Callers.
- DAD and PPR Demographics.
- Priority-Setting.
- Projects (e.g. education advocacy).

Quality Assurance

a process-centered approach to ensuring that a company or organization is providing the best possible products or services. It is related to quality control, which focuses on the end result, quality assurance focuses on enhancing and improving the process that is used to create the end result, rather than focusing on the result itself.

Quality Assurance

Assess Environment

- Assessments
- Case reviews
- Analysis of information

Set Strategy

- Through analysis, find areas of needed training for improved services
- Setting goals and priorities to change current problems and prevent future problems

Quality Assurance Cont.

Persons Served and Other Stakeholders

- Obtain their input
- Long-term organizational excellence

Implement the Plan

- Hold staff trainings and supervision
- Improve service delivery
- Translate strategy into practice

Quality Assurance

Review Results

- Monitor and assess performance and quality of services
- Review and analyze implementation of the plan
- Develop or initiate further quality improvement changes

Effect Change

- Review
- Revise
- Renew
- All for positive outcomes aligned with the organizational purpose

I&R Quality Issues

- Live vs. recorded.
- Don't lose callers!
- Closure and notice of closure.
- Intake with consistency and fidelity.
- Accurate, honest, up-to-date advice.

Staff Development

This should be an ongoing process and there are a variety of methods and models to use to assure that your staff is receiving up to date and quality training.

Technology has introduced us to a whole new way of communicating and reaching larger segments of people that can benefit from the various training that is available.

Staff Development

- Webinars
- Teleconferences
- Video Conferences
- Informal Brown Bags
- Staff Training on In House Programs
- Workshops
- Unit Meetings

Staff Development

Open-Line of Communication

Positive Feedback

Training on Medications (side effects)

Available Resources

Staff Coverage

Different P & A's have different systems on how their intake systems operates:

- Set Intake Hours
- Defined Intake Staff
- Designated line for Intake Calls
- Retrieve & Return Intake Calls
- Entering Data in System
- Assignment of cases

Ethics

What Information is Confidential?

- All information related to, or provided by the client is confidential. This includes:
 - The identity of the client;
 - The fact that the client consulted with the P&A.
 - Any information through which the identity of the client could be derived, such as photographs, video and audio recordings.

Ethics

General Rule:

- You may not reveal the confidential information of a client to anyone other than:
 - the client;
 - The parent of a client who is a minor child; the guardian of an incapacitated adult.
 - May not reveal information if parent or guardian is potentially an adverse party.
 - Other P&A staff.

Ethics

When Must I Disclose Information?

- Most states require that you report when you have cause to believe that a child has been abused, neglected or exploited.
- Many states require that you report suspected abuse/neglect/exploitation of an elderly person or adult with a disability.
- Attorneys are generally excepted from these requirements, but may report. P&A statutes and regulations may bar reporting.

Ethics

What about . . .

- If the caller threatens to commit suicide?
- If the caller threatens to commit a crime?
- If the caller has used P&A services to commit a crime or fraudulent act?
 - Immediately contact your manager or legal director.
 - Have an up-to-date protocol and be ready to use it.

Ethics

Conflict of Interest

- Caller has threatened legal action against the P&A, or against an individual lawyer.
 - Creates a conflict of interest between client and lawyer.
 - Case should not be accepted without careful review by supervising attorney.
 - Good priorities, grievance policy can help prevent or address these situations.

Ethics - Other Issues

- Giving legal advice.
- Creating an ongoing relationship.
- Talking with represented individuals.
- Talking with criminal defendants.