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Please stand by for realtime captions.

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Welcome how to manage the I&R. At this time all participants are in a listen only mode and later we will conduct a question-and-answer session. I will turn the call over to be in Washington from the NDRF in. You may begin.

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Hello, my I&R fans. I know that you are a crazy bunch, so I am excited to be with you today. I am more excited to be with Mark McWilliams and John Ramsey, who supervise I&R. John does so in Ohio and Mark McWilliams does so in Michigan. And they have just a general set of tips and things to give you about managing I&R and intake. It is a challenging job, I know. You are at the front door of the PNA that you represent and and we have started here at the National Disability Rights Network. INR card -- quarterly webinars. This is our first one. We are glad so many of you could join us. And Mark or John, take it away.

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Good afternoon everyone. I am Mark McWilliams. With Michigan protection and advocacy service and I'm excited to be working with Jan rot -- John Ramsey. In the next our have. One of the examples of a Ohio and Michigan cooperating on just about anything. John, want to go ahead and turn it over to. We will turn -- talk little bit about managing information and referral services today and intake, we will talk about quality assurance and confidentiality issues and then we will take some questions, either through chat or on voice at the end. John, want to take it away by the

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Okay, thank you Mark. Again I would like to also acknowledge my appreciation for EN asking Mark and I for this challenge. We hope that what you are about to listen to and what you are about to hear is informative and how to perform your job. Even better than what you are doing now and you are all doing an excellent job. It is good to CNN market and this is Ohio and Michigan working together as a team. That is rare, but we look forward to it. I always enjoy the opportunity to talk to and work with Mark, so thanks for sharing with me as well. I will start out with talking about the first slide. I'm imagining that everybody gets to see the slides as they go through. Am I correct?

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Yes.

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Good. 'S you I will talk about this first slide and excellent intake specialist. We will go through each one of these little bullet points and talk but this and I think someone said there will be an opportunity for questions and answers -- Q&A session a little later on in this hour and a half we're going to be here. One of the first things we talked about our ethical issues. Mark is going to go into that a little bit more in detail later on. But for the purpose of this, and excellent intake specialist applies with the applicable rules of professional conduct. When we speak about professional conduct, we speak about the person being able to perform the job that they are doing with the clients we are working with in a professional manner. That we are able to the people who are coming to us for assistance are in some kind of a crisis in their life, and that they may present themselves in a way that you may all immediately feel like you need to get defensive, but actually, in actuality a professional way to handle that would be to understand what that where they're coming from and work with them for were they are at in their lives. And to respond in a very professional manner in how you speak to them and not putting them down. Not being negative in your response to them but trying to be -- respond to them in a way that is both productive for you and for them. Which goes into the next bullet point about courteous is to treat all colors with respect and attention to their needs. Sometimes when callers call, their issues may be issues that you don't feel are that important or necessarily something they need to be calling you about. However to them, at this point in their lives it is very important to them. And we want to be courteous and treat them with respect and dignity, with what their issues are and how they want to get them addressed. And so we want to be as courteous as we possibly can. We don't want to act like we are putting them down or have a tone in our voice that we are better or smarter than they are. We want to be cautious about how we behave when we speak to the individuals that call us. The other bullet point is to gather accurate and complete intake information and complete assigned tasks correctly. Gathering the information is extremely important. What you put in the description or the document that someone else has to read is they are reading what you put in there so they did not have the opportunity to talk to that person and didn't hear the -- so therefore they have to rely on what you write up is as accurate and as close to the description as to what the person who you spoke to gave you. It is very important to be as thorough as you possibly can with the information that you provide so the person who comes along and has to read that, can get a somewhat clearer picture of what it is of what this person would like to address. The other bullet point is the helpful. Assist callers by providing accurate and meaningful information and referral and I'm sure everybody does this. This is something that after you do this for a while, these things become natural but it never hurts for all of us to every now and then get some reminders and some ideas on how we should behave and how we should react when we are talking with people on the phone. As assisting callers by providing accurate information, giving them the best information that you can possibly provide them. That is going to help them get their issues resolved or point them in the direction that they need to go in in order to work on getting their issues resolved. Efficient with reasonable speed without sacrificing you all know these sometimes the intake lines can get very tight up. A lot of people waiting in the intake you to get -- in order to get an opportunity to speak with you so they can discuss what their issues are and you can try and assist them.

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In light of that. One of the things that we often have to do is make sure that we pace ourselves appropriately when it comes to speaking with crime -- clients. When I was at the end the our conferences past summer, I mentioned that I usually try to tie my calls up within 10 minutes. A lot of people are surprised because you don't seem like you can get everything that you need in 10 minutes but it is a matter of how you go about handling the call and you being in control of the conversation and not letting things drift too far per. Each person has their own techniques and skills on how they address each call. However, being mindful of the fact that you want to give the information you need, you want to record it as thoroughly as you possibly can, and you want to do this in an amount of time that will allow you to be effective not only with the person that is on the phone, but be ready to take the next call. Each system -- each person has their own system on how they like to do that. But nevertheless, as you go through the different things you have to do with each and every call. And your techniques should also include being efficient and mindful of time as well. Data collection, generating or bring together information that has been systematically observed, recorded, organized, characterized or defined in such a way that the logical profession's and inference may occur. As I was speaking, one of the things you want to do is you want to make sure that you gather the information that you need in order to make it so that the person comes longer reads it after you effectively assess what it is calling but. And you want to make sure that you get any make it correctly, is the callers name. A lot of time, a person will give you their name and you will just assume that if someone says their name is Jane, you assume it is spelled Jane. Where some people may spell it another way. One of the things that I like to encourage with my staff is that I was ask a person how to spell their name even if it is something as simple as Joe. Spell it back to them if you don't want to ask them how to spell it. Getting a correct name is extremely important. Getting an address is important. It never hurts to ask somebody to spell out the name of their street even if it sounds like a familiar name. Something you know you know how to spell. The contact information. This case will be assigned to somebody. And with modern technology people don't just use telephone numbers. Sometimes they have e-mail addresses and you have to make sure that you find out the best way to contact this person. If the person is hearing-impaired, then you want to find out if they use -- what type of eight system they use in order to communicate. If the person has any site issues, you want to find out if you write in large print. Or you need to send braille. All of the things you want -- when you're going through these calls. And getting the colors concerned. You identify what the concerns are. A lot of times -- as long as you can keep them focused and the idea -- what they're calling but. This is being helpful for them as well. Finding out with the disability is. A lot of times these callers will talk about a lot of different things but you need to know what the disability is in order to be able to effectively fund the case for one thing and also to know what direction you need to headed. the situation applies any court dates, any hearings, any kind of important meetings that are going to come up. These things are important. Once the case is assigned. If they have a hearing the next day or two days later, and you don't mention that in that description, that will impact on how that case is serviced. We want to make sure we get that information as well.

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You are probably thinking when you think about data collection you are thinking we have to collect data. I'm here to tell you that as an INR specialist, if you have a tremendous opportunity to help your agency's work. And to help the community. You are sitting on a gold mine of information. From hundreds of people, thousands of people calling your agency and giving you information about what is going on in the community. A lot of times that the only source but the major source of information on a variety of areas. And whenever you are asking these questions, and disability and all that information. Think about the service you're providing to the community. There are a number of different things where this helps you. You get background on frequent colors. We talk with people frequently, people who call it -- sometimes several times a day. Sometimes several times a week. Sometimes they stop calling for a while and we worry because we have not heard from them. The benefit of getting information when you're collecting data about people who call you often you can give a consistent message to that person whenever they call you. Part of what John referred to, giving the information, as a I&R advocate is giving good information and sometimes that means information that your color is not necessarily going to like. Your job is not to make them happy, it is to give them information they can use and information they can need to make decisions about what is going to happen to them, what they will do next and what their rights are. The better you can do it is get background on people who contact to frequently, the better you can be consistent in giving them information about what their rights are, and what their recourse might be. We use that for casework and use that to record INR -- I&R information. I am in the middle of doing the PPR, drafting the first draft of that so any of you who have ever been involved in that process, the federal report to submit for your grants. Many times information referral is indicated I just a number. How many people did you provide information referral to. But you can use that information you gather to get important demographic information to get a feel for what is going on in this community. For example, we have eight of four counties. In Michigan. 84 counties. We don't know from one day to the next which people from which County will be calling us. If we gather information about where those colors are from we can get a feel for where the word is getting out about our services, and where it is not. Sometimes we're surprised when we see counties that are big counties, that have a lot of people but don't call us very often or very small counties where we get a lot of calls. There are opportunities to learn about the demographics. We for example have a really hard time serving people who are Hispanic. We have a really hard time finding those people. The only way we can establish whether we are making an impact on the community is by looking at our I&R calls because the case volume is not so high that we can get really good information that way. Then you also use that information for studying your priorities. Our agency is a two-year priority planning cycle and part of that is looking at the analysis. Where they are calling from but what they're calling about. If we know for example or top-five calls are special education, Social Security, employment, health care, and institutional rights. Or institutional conditions. We can look at that information is good, concrete information about -- voting with their phones. They're calling us to say I have this particular problem. And lastly, the benefit of collecting this information is that you can use it for special projects. We have a survey that we -- as part of our information and referral process. Parents of children with disabilities. Whether or not they're having problems in school we asked them -- is your kid having any behavior problems at school. The may want to ask a series of questions about those problems they're having.

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To date, since we started our project in 2011 in the spring we have collected about 3000 survey responses about special education and disability related behavior. I can use that information to indicate and identify trends, to figure out where problems are occurring. We know for example now that 40% of our colors, who call but disability related issues with their kids. Are being culled to bring her kids home early from school. That is not information that is anywhere else. Schools will tell you how they have no data on that. Those are not recorded as -- but those children are nevertheless removed from instruction. There's no other way to gather the information. And you talk to people, it takes a great opportunity to collect information about a whole variety of projects and work that you will do to get set up for that.

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Quality assurance, a process centric to ensuring that a company or organization is providing the best possible product or services. It is related to quality control which focuses the end result, quality assurance, focuses on enhancing and improving the process that is used to create the end result rather than focus on the result itself. Quality assurance, there is a lot of different -- the bullet points that are identified here, I will speak about each one of them. Assessing environment, assessment of the environment, I will use an example when you get a call from somebody who is in an institution or a mental health hospital, going back to something I spoke earlier when people call and they are in crisis, when they are in a situation -- their environment also Dick Cates how they respond when they finally get a person on the phone. A lot of times you have to realize that a lot of companies now have switched over to automated phone systems. And when you call one of these automated phones, or one of these places that have an automated phone system you get one recording after another. Constantly referring you to this and finally you get a real person. And when you get a real person you're so frustrated that now you're ready to go off because you have a real person who can hear you and respond back to you and unfortunately that is a lot of things we get here when you go through the intake process is you get people who have gone from one system to another being transferred to this person and told this person, by this person that we can help you and they finally get a real person. Done all of their frustration is going to come out on the intake worker. Being able to understand where this person is that mentally and their frustration is is being able to be professional in handling that kind of a conversation. That kind of a person. When we speak about -- an environment and assessing the environment, that is one of the other things that we want to consider when we are talking. With the individual so we talk with. Case reviews, when we do our cases, when we enter information that we have to enter we want to make sure we have the right information and having more than one eyes on that is helpful, in making sure that we have the information that we need. And that we have done all that we can possibly do. Especially before the case reaches a point where it is ready to close. You want to make sure that you have enough reviews of that case in order to determine if we have done every little thing we think we could have done. A lot of times one person handling the case by themselves may think they have covered every little thing I can cover but being able to have somebody else look at it, and say did you do this or did you do that? In order to just make sure that you have covered everything that you needed to cover. In order to make sure that that client is giving all the services and all the assistance that this agency or any agency could possibly provide for this. Analyzing of information, making sure that the information that was provided is making sure the information is good and quality information, it may not be something that the person wants to hear. It might be something that just further causes frustration for them because it is information they did not necessarily want to hear. But nevertheless you have to make sure you have to provide information in order to have the balance make sure the person is getting everything they can possibly get. The benefit from the assistance that you are trying to provide for them. The other category is strategy. Through analyzing, find areas of needed training for improve services. This is an example of one of those things is being able to provide training. Training is something that we all can benefit from and you can never get enough of it. No such thing as a know it all where -- things change every single day, and training is always needed to improve our skills so we can improve on how we interact with the cut client that we serve. And we can make ourselves better and hopefully make their lives better as well. Setting goals and priorities to change current problems and prevent future problems, that is ongoing. Everyday you learned something new that you could have done and you might have been able to do it better. There is always instances that are learning opportunities. In order for you to be able to provide a better service, be able to do your job more effectively. And to be able to provide more resources for people. The training is constant and it is ongoing and it is always beneficial.

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Person served and other stakeholders. When it comes to obtaining their input, that's a very beneficial opportunity. To get the input from people who you are serving. To find out exactly what it is that you could do that is going to benefit them. One of the things that I know that we work on many things but one of the things I know that we would like to get a little bit better at them that is having a better interaction with our deaf community. We try to figure ways that we can interact more with our veterans. And in order to find out how we can accomplish that. We need to -- region of them is in order to be more effective in providing services to them as well. And that is how we have learned that we can be a lot more effective in providing services is if we reach out to the community and what the community know that we are here on the kind of services we provide. And then asked the community, what can we do to make our services more effective in order for you to be able to benefit more from us and for us to be able to provide you with more assistance. And then the long-term organizational excellence is just the opportunity to be able to do these kinds of things. And be able to continue to work on improving how we perform our business and how we perform what it is we do. So that we could be more effective and excellent and what we are doing. Trainings in supervision, as I mentioned before, trainings are always important. And being able to interact with the supervisors. Holding opportunities. Staff meetings and opportunities to have -- where people can voice their concerns. If they have issues to allow them perform their John -- job being able to have a voice and him -- have that voice. So they can be -- training opportunities will always be there. Training as I mentioned before is ongoing and it never stops. You can never get enough training. In the work that in the PNA. There is always room for improvement. We can never say that -- there's always room for improvement, time passes by, new problems come, every single day. It's always good to have an open mind the team and team leaders. That will allow you to do the opportunity to improve so that your delivery can get better and better each and everyday. And translate strategies into practice. That's one of the things you want to make sure as you -- you listen to ideas and gather new thoughts and practices, and perform your jobs, you want to find out a way how you can put it together and put it to work. Always looking for an opportunity to say how can I improve, what can I do to improve that. You listen to ideas and you get input from other people and find out that they are always to improve it eyes dotted and T's crossed and you put it into place and next thing you know you're doing an excellent job. To review the results you monitor in the stuff for performance and quality of services. That is not just you, a team of people to help you monitor those things, everybody can be able to have the opportunity to share in the idea of saying something is going, something is going bad, look at the quality of service that you are giving by removing the negative things and improving on the positive things. You want to review and analyze an implementation of your plan. We have a plan that you put in place on how it will work, you have to review it from time to time. In order to make sure that it is working. And where the improvements need to be made. There has to be room to analyze. That is all part of the quality assurance and develop or initiate further quality and changes. Again, that is a matter of working together in order to come up with some quality ideas. And some quality plans that you want to put into place in order to improve, in order to make changes within the agency. Effect change, that takes review. That constantly goes on, that is -- just like training, that is constantly going on. You get something that works but you know there's always room for it to improve. You want to look for ways to improve it so you constantly want to review it. I have learned that over time the same problems that existed 10 years ago, they exist today but sometimes they are 10 times as worse. Yaws want to look for ways to improve on what it is you are doing. You may have to revise some things. There some things that are going very well but they need revision, time has caused revision, money may have caused it for revision, there's always different room therefore to look at things and determine exactly how is that they need to be revised. And then renewing, sometimes something that you had an effect a year ago, and you haven't dusted it off or used it in a while, you find out that is something that I can use with this particular client or this particular group, and you may want to look at renewing it and adding this and subtracting that and the next thing you know it is something positive you can use in order to accomplish what it is that you're looking at. MMD positive outcomes aligned with the organizational purpose. Always keeping in mind what the purpose of the agency us. And keeping in mind that everything that you do has to stay in line with what the purpose of the agency is for. And if everything falls in line with what the agency -- the purpose of the agency, you know that you are working in the right direction. In order for that to happen, there has to be a good line of communication that is open between everyone. And doing that, line of communication opens, you know you're pretty much in line with what the agency is working for a new notice you will do what it is, in order to help the clients that you surf.

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I like what you said about aligning what you do with the organizational purpose because many people forget, I think when you do information referrals that you are a critical part of the P&A mission and the work you do comprises a good 25% at least of your work. It's important for you not only to be consistent with what the rest of the organization is doing, but also to be -- to make sure that you understand you have a role in determining what that purposes. And what that mission will look like. Here are a couple of issues that come up with quality and some things might appear really obvious but there are things that mean a lot to your callers. It's important not to forget them. As John mentioned earlier, most places now including a lot of advocacy organizations are going to -- telephone trees or web-based and they're losing the ability to communicate person-to-person with people who are contacting -- trying to contact us. One of the things that you can do is to maintain the availability of a live person to talk to person who contacted you. That is one of the reasons why people spend a lot of time to tell you everything. You may be the first person may have talked to for quite a while. We have tried very hard to keep our -- we have live people. Life people answering the phones and live people giving advice, and not recorded advice, not digital advice, that kind of thing. We're looking at those as well because many of our people who contact us have various ways of learning information. Part of the innovation is thinking about how people contact you. We are trying to figure out right now how to deal with text requests. People in the deaf community might -- texting to -- and people are using text to communicate with other people about questions. That raises a whole host of -- confidentiality issues and how to get them. How we respond them, think about the mode that people use. Don't forget that there is value in talking to a live person face-to-face. Probably the most common complaint that is filed against attorneys as far as grievances go is failure to respond to phone calls, failure to keep people up-to-date of the work you're doing. When people contact to e-mail have a very brief moment where you are going to have contact with them to give them the information that they need. You need to make sure, many years ago, various different ways of responding to, callers, messages, appointments, losing about 7% of our callers. Even because we can get them back, messages, wrong phone numbers, something will happen. They take the calls the command. It is intensive, we find that its worth it. And that is one of the key indicators of quality. And we want to keep them. And we want to make sure we get these colors and talk to them. And keep track of that. Along with being able to talk to people also have to know when to end the relationship. We are based on a law firm model and we provide legal services. My opinion that most of what I&R advocates provide we live by, and we have to be very careful about making sure people understand when your relationship is done. There is an additional factor, you don't want to make people believe that you are actually rectally representing them when you are not. That means you've got to wrap up the work. If you have I&R that are open for a long period of time, becomes reasonable for the person contacting you that you are working on their behalf, their interpretation will govern today. You have to let people know that you're done. When you're done. And you have to provide them with notice of that. You want to do intake with consistency and fidelity. I make a distinction between information and referral services which I consider to be short-term assistance information, rates advisory, an intake where you are actually screening people for possible direct representation by an attorney or advocate. We do both, information and referral. I suspect that many of you do the same thing. Part of what you get to do of course, one of the difficult parts is you have to tell a lot of people we will not be able to represent you. You cannot have a free lawyer or free advocate.

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We don't have enough resources or we have to tell people know quite often. It's important when you are doing that, to do that not only with consistency so that you have some sense of here's the way we --

are the kinds of cases we taken this is how we take the month and we tell people we don't do that kind of work. And with fidelity, that means that you want to be true to the guidance that you get from your organization, from your community when you set your priorities and objectives through during the case work and direct representation work. That the community says you should be doing. And you have told them you're going to do. You have to be consistent on how you apply to standards for referring cases for direct representation. Him I do that through a process. Team review, you may have a particular person who does that but at any rate, you need to do it consistently and then finally, you want to give accurate up-to-date and honest advice. Nothing I hate worse than getting a call from somebody who says I talked to this private lawyer and he said I have a great case but I can't take a right now. You called it -- I'm sure that we will find you a lawyer. If they don't have a great case and you can see that, talk to your attorney, then -- this isn't going to going to work. I think people deserve to know that. You of course are getting information based on one phone call. You have to be very careful telling people they don't have a case. But I think that -- and they want to a lawsuit about it. They confer with legal staff. I think the organization has a responsibility to tell people, you're exhausted. I could be the minority on this. To continue to tell -- you have a great case, some the moment endless chase. And will never pan out. Along that you will need to make sure your advice is up to date and as John has mentioned about quality assurance, it is continual training. We don't have time for that. I'm telling you that you don't have time to not do training. You have to develop yourself and develop your knowledge. Our place in the community that we are -- is a provider are the expert on disability rights. And the go to person on your community and questions about disability rights and you need to make sure your knowledge is up to date and is accurate. That is part of what I see.

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I want to thank you for the point that you made about accurate and up-to-date on this device. That is so true. We get so many calls, from people who have gone we consider bad advice like you said, you get a call from someone who said I talked to this one attorney who told me I had an excellent case and you guys would take case. The two points should not have told that person. Another calling ask and we are -- and you don't have a good case in -- they put you in the bad situation. You're giving them a lot of information -- negative information off the top. And so that is a very good point and I am glad you made that. Talk little bit about staff development, again I can't help but to talk about the importance of staff development. And ongoing -- a variety of methods and models to used to ensure that your staff is receiving up to date and quality training. And the sheer technology is introduced us to a whole new way of communicating and reaching out larger segments of people that can benefit from the various training that is available. Just by virtue of the fact that we are doing this training today, and we are touching -- how money people have signed up for this. I heard it was over 60. And from all over the United States. Imagine if we had to try and figure out how we could do this and get -- even if it is 60 people, get them all into one room at one time. It would take forever to do something like that and the expense would be a raises. Outrageous. By having the opportunity to offer this kind of training is just a remarkable step that we have made when it comes to opportunities to train. That is a very important stop that is very beneficial to all of us. Again, webinars, teleconferences, videoconferences, informal brown bags or something -- and it has gone over very well. Very informal, they are not mandatory, people get to choose if they want to come. You try to make it exciting by doing other little things for the brown bags. And what is really funny is you may start I would just two or three people coming up before you know it, you bet your entire staff and people mission be there. Janitors, just wonderful. And it turned out to be something really nice. Staff training on in-house programs. Knowing what other programs within the agency is doing, is also very beneficial. For people who may not work in intake. In the intake training. Gives them to see and that's amazing opportunity. Sometimes you just don't know. Even for intake staff, to have the opportunity to go out with the program staff. That's an amazing opportunity and whenever that opportunity is -- presents itself and as long as it is not going to affect any operations, I think that opportunity should always be looked at and that door should always be open. Our holding workshops, that is another way of getting positive training or not just one in particular program but all the different programs. And unit meetings. They can either be formal or informal, but get everybody together every now and then, if nothing else to have the opportunity to talk and get some things off your chest. I know the unit here that I supervised, will come in at the end of the day sometimes and have everybody sitting around and eating a piece of candy out of my candy jar and let them burn off steam about the testator today. It's amazing that sometimes people don't realize that how much the intake staff has to put up with, they days time when it comes to the intake calls. They can be extremely stressful. Which is, I am very happy that we have enough intake staff here at this agency and nobody has to be on the phone all day long. That would just be mentally stressful. They break it up and they take turns -- turns being on the phone for two and a half hour shifts, and this allows them the opportunity to debrief from all the things that they have to listen to and the calls. Training is something that is really important, and whenever there is an opportunity for staff development, that is always a great opportunity for the staff to participate in. The open line of communication, one of the things that is really helpful especially in your -- I'm saying throw your entire agency, one of the -- that is a very good point in your intake unit. Because a lot of times, other programs within your agency are busy doing a lot of different things. And the intake staff sometimes gets excluded. Not on purpose, sometimes it's just -- it is just something that didn't get thought about. And so it's very important that whatever communication is happening in the office, that it gets announced in the intake staff is imparted it. The intake staff needs to be involved. In what is going on throughout the entire agency and not just what affects intake. Positive feedback, that is always a good thing. Living people know they did a great job. Especially if they -- after getting a call from an I recall her, and then that person -- that I recall her wants to talk to the supervisor, and they talk to the supervisor of the supervisor never get back with the intake worker, that person initially talk to so what did they say, sometimes just being able to pause a moment and say -- the supervisor to get back to the person and say I talk to him and everything is fine and let them know that they didn't do anything wrong, and it was just all because a miss understanding, but being able to communicate back and forth, to let people know that things are okay, and that the issue did either got resolved or -- did not get result but there is feedback going back to the person who initially took the call so they are not left out hanging what in the world happened.

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Training on medications. That is a really good point. Because actually, there is a lot of medication out there that causes people to react the way they do and to behave the way they do. A lot of times we want to chalk it up to just behavior and this is how this person is and different things like that. And the reality is, most of the time it is because of the medication they are taking that are causing them to behave the way they behave. Being able to know about medication, being able to understand the side effects of the medication. Is a very positive training. And it is something that we did hear a few months ago but we need to do it again. I found it very beneficial. And I think that that would be something, when you look at the kind of work we do, that is just another bit of knowledge that is very good to have on hand. Just whatever available resources that are out there, again it goes back to having a good line of communication, being able to listen to people were willing to offer suggestions. That every suggestion is going to be used, that every thought is going to be processed out but it is good to toss it all in the pot and figure what you can use out of there, what you cannot use in order to make things a lot more effective. In the work you are doing. At the intake staff certainly has to take on a big responsibility, and they have to give a lot of information in a very short period of time. Whatever resources that can be available to them in order to help them with that process is always good. As Mark said earlier, over 80 counties in the state of Michigan, 80 counties in this state of Ohio, service all those comments. Knowing what resources are available in those different counties are extremely helpful so we're looking for ways to build our resources and be able to find ways that we can appoint people in their direction. In order to get the assistance they need.

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In the interest of time I will move ahead just a little but. To talk about ethics. You are all aware that -- you should talk with your colleagues in other states and get a feel for all the different ways that information and referral systems are organized. Sometimes they have been organized in the same organization, more than one different way. We have different organizations here, our seven pretty stable over the past few years but there are a lot of different ways to organize information and referrals. When you think about that, to think about information and referral and doing intake as a positive service that the agency provides. Not just a way to screen people. The way to talk people -- you have a positive service that you can provide to people and however you organize yourself is something you need to do. We're going to talk first about confidentiality briefly. The information that you -- the information that you have about a colors confidential, period. That means the fact that it includes who they are, their name, that they call to, and the information that you can figure out who they are. Recordings, those kinds of things. That is information that is -- that should be kept confidential. We have these circular discussions with summer colors. We send out, cards. I just finished going through a quarters worth of, cards about our service -- services. We got grades ranging from a plus two F minus. I never realized UK get an F minus. Information is confidential. We send these cards oh two people and they call us and say why did we get this card? I don't remember calling you. We cannot tell them they called because we have no idea if the person who is contacting us called us. We say we really can share any information about our callers because they call us expecting that anything they say to us is going to be confidential. We have many colors, I am sure you run into this as well. Where the colors are -- callers do not want to give information including their name. We had a caller just last week who insisted we delete any reference whatsoever to his contact information. Confidentiality is critical for colors. They are often worried sometimes with good reason, sometimes not so much. They're often worried about information about themselves being collected by anyone, and this is an important value we have to respect. You have to protect the confidentiality. You not cannot reveal the information and we would reveal information quiz a minor, you have to be careful about reviewing information, or parents of adults. There are circumstances, for the parent or the Guardian could be in a conflict of interest role. You have to be very careful to be able to identify before you start sharing a lot of information. Whether or not that is --. One of the ways we try to get around that is we say we need the person to call us.

Person with the disability, if it is a parent calling us about -- son or daughter. We say we really need for them to call us. You could call us together but we need to talk to them. So that we can figure out from day one. You can share information to other VA staff -- P&A staff but that is it. If you don't share information with anybody else as a general rule. There may be some circumstances and this will depend on your state, when you may have to disclose information. There is a -- many states require reporting. If the child has been abused, neglected or exported. Also requires the -- is the person is an adult. In Michigan we have -- attorneys are exempt from those mandatory reporting requirements. We have -- we struggle with the fact that some of our advocates have backgrounds or licenses that make them mandatory reporters. And we have less of a problem with that than we used to. We are very clear with people when they come to work, before we hire them, that they are coming to work for a legal organization and the legal rules of confidentiality will govern our activity. They have to be okay with that. We say if there is ever a problem with that, you don't report something, we are going to defend you. We have never had to do that locally. That is something we make clear to people.

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You also have to keep in mind that with the various rules you have in your state, about reporting of abuse and neglect, that they protection and advocacy statute also have a confidentiality protection in them. The statutory duties are for protecting privacy and information and are also there. The other thing to remember is thinking about we've got to be careful about what we tell people. If you're calling -- I feel like I'm big abused and I want you to report it, I think there's something going on here. Them the plans direction and permission, you can report. But you have to have permission and understand that is something they are presenting to freely and that they understand that is what they are doing. You have to be careful about that. But the disclosure of information rules are tricky and vary from state to state. You may have run into these issues. What if the caller threatens to commit suicide? We have had people do that on the phone. If the caller threatens to commit a crime. What do you do? If the caller has used our services to commit a crime or fragile neck. We have never had that issue,. We have had callers on occasion will talk generally about suicide. We're not suicide counselors, we are not trained and we tell people we are not trained. We do not do counseling. We do not do suicide counseling. What we do is -- we have a protocol, you get a manager, if I'm a year you get any manager who can help you. We have up-to-date protocols, up-to-date numbers for suicide prevention hotlines. And we tell our callers is that we are not suicide counselors. I am happy to try to connect you with a suicide hotline if that is what you want. If they want that we will connect them. The Citadel was a color offered to connect them. But we are -- we will offer to connect two but we cannot help you otherwise. At some point after we have talked with them we will and the call. If they will not give us permission to share the information we can't go and show the information. It is a difficult situation. We run into it on occasion and what often happens they say this is why I am unhappy that you and they will tell you what's going on. It is often an expression of frustration over not being able to resolve their particular issue. We do of situations on occasion where -- we have not had them here in our office but we have callers who threatened to sue us, threatened to sue individual lawyers. If it goes any further it creates a conflict of interest. This is where you really have -- this is where your view of good priorities where you work through some of those circumstances, you think there is a high risk of a conflict of interest coming up, this is where it is good to have those priorities. If you have callers who are in a position where they my wine up suing you for something, sometimes that happens, there is a high rate of probate planning. Estate planning.

Setting your priorities and having an agreement policy. To enforce the fact that your protection and advocacy agency is going to the right process to result to make determinations of what you will be taking on. Some other issues that come up around ethics. Given legal advice, it is not enough for you to say we don't give legal advice. There is a hold detailed training on practice of law and what giving legal advice is. It's a broad definition in my view and a good chance you are doing it. You have some protection in some way. If you have attorneys working in your agency, just some protection because there is in someway some link to them supervising the work. If you're doing special education advocacy there is specific protection for giving people information about special education rights. Some of that is protected by the fact that you are working in protection advocacy agency and other kinds of protection. You have to pay attention to it. It is not something that you can just ignore. My view is if people -- they're using the last -- because they can't get a you any other way. Because you have been them. By challenging --

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You have to think about organizationally and think what the responses. That is not something that individual should have to carry the burden of.

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You have to be careful about creating an ongoing relationship. You do not want to just keep a person situation open and say I will be your advocate and continue to do this work for you. You are now setting up an ongoing relationship and that creates a reasonable expectation that you're going to continue to work with them. And that is not something you are ready to do, you need to think about making sure that your services are time-limited and you let the person know that the services are over. Many of our callers get frustrated when we tell them I will not give me the person you talk to before. They are not here ready -- ready to take your call. They wanted talk to the person I talked to before and we tell them this is not -- we are not representing you. Out this is short-term service. If this -- this person is not your lawyer. And try to answer your questions. It's important in those cases to make sure that you have good information about the calls that you have had in the past seeking give consistent information at the same time say we are not fully representing you. You need to be upfront with people about that. They want that relationship. If you're talking to people who have lawyers, a lawyer could not do that. That would be an ethical breach for a lawyer to talk to someone -- and it's a duplication of resources. Here is a call that we get it's, my lawyer is no good. Or they won't listen to me or they will not coming back. We give information on the circumstances on there are challenges you can bring to that. It is not a good situation, we know that on some of those circumstances the lawyers who are going to represent people from proceedings, Gurian should -- they're paid very little. And sometimes they don't get the attention they need. You have to be careful when you're talking with represented individuals with understanding that as lawyers, you should not be second-guessing the old lawyers. We will do that. There's a specific problem I think in talking to come medical -- criminal defense. If someone called you from jail or in Michigan we have a friends a cost Kosovo, were individuals who are being evaluated for competency, before they are tried will be evaluated. Sometimes they will stay there and go to jail. They have not been tried for whatever funds they are charged with. They have eight -- appointed counsel. The person would call themselves and I get my medication and jail. You have to be careful. When they start talking to and they start talking about when I committed the crime, and you are now with us, because the conversation they're having with you is not a good relationship. And you can in those cases, you could be subpoenaed to testify. You have to be careful and my suggestion is -- supervisor, we need to talk to their attorneys and their attorney says I am okay with talking about this particular issue, I could use some help to live, and be well, the new got some possibilities of -- information. You have to be careful because there's a criminal case, you can blow their defense. By getting information. Have to be a little careful about that. I think are we are at the end of our organize presentation. And so Ian, I think we have some time now for questions.

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Thank you very much. Is Joe could come back on the line and give instructions of how people ask questions.

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We will now begin the question-and-answer session. If you have a question press star and then one on your touchtone phone. If you wish to be removed from the queue rest the pound or hash key. You may need to pick up the handset before pressing the numbers and if you have a question, press star and that in one on your touchtone phone.

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For any questions from the audience, press star one on your touchtone phone.

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I know there has to be some questions out there.

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One moment please.

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Angie [ Indiscernible ] with a question.

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I was just wondering if you could give us some tips for how you keep the intake calls that 10 minutes or how to keep people more on track so they are not trailing into a very long storyline.

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Can you hear me okay? Good. I get that question quite a bit as a matter of fact. And as I mentioned earlier, when I was speaking, a lot of times -- everybody has their own tech Meeks on how they handle the intake calls. I will tell you how I handle my and that is when you initially answer the phone, and I'm sure you are very familiar with this, the person begins her story, before they tell you their name or anything else, they begin to go into their story. A lot of times they will begin at the very beginning. When they do is I listen to the story for a couple of minutes. Two or three minutes, I will listen to what it is they have to say and at that point after I've given them time to say -- to give me their story, I will let them know that -- I say I need to ask you some particular questions. And just like you get the information they do. You do not need to go into your entire story because if it is a case that we are going to give to somebody, that will be the person who you will need to give all the information to. I just need to get basic information in order to be able to put your situation into our system and then I will pass this onto someone else who will review it to determine if it is something that we can assist you with. I will ask my questions, they will drift, but I always manage to bring them back to giving me the answer to the question I am asking. And then I get their contact information, the other data I need in order to finish processing it and then I'm pretty much end the call and I let them know that if this is something we can assist you with, either I or someone else will be back in touch with you. I give them a timeframe of anywhere from three to five business days and I just assure them that someone else will be back in touch with them and at that point, if more information is needed, whoever context them will be able to get that information at that time. And that usually helps them understand that what I'm doing is moving conversational long. I am staying in control of the conversation and I'm also being very polite to them as I am talking to them so I'm not trying to rush them off the phone. I am assuring them that I need -- for the purpose of what I am doing, I need the basic information in order to get it into the system so that it can be further reviewed and then once it is reviewed and if it is assigned, that will be the person you can go into your life story with.

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The only thing I can add to that, I'm impressed by the 10 minute thing. I think the listening part is really critical. If you try to start by interrupting a lot, that has the opposite effect that you try to have, which is -- people don't get -- heard. You if you try to interrupt them and redirect him, think that is -- then you are engaging in a power struggle and losing part of the call. I think the listening part is really critical. The other thing I do is what is happening to you you today poppy sometimes that helps. I don't want to waste your time. I don't want you to have to tell your story to me if you have to tell it to someone else.

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Thank you.

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Next question.

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April [ Indiscernible ] with a question.

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This is April. Thank you for the presentation. John and Mark I cannot recall which one of you told the story about your staff, but we here in North Carolina love to learn more about how you sustain your system of getting your intake workers two to three hour shifts and then they go off and to important work in your organization and when they aren't on the phone, what other types of support are they providing? You him and him

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Are intake staff here are assigned short-term intervention cases, that require follow-up phone calls and we call them short-term intervention cases and so a lot of our intake staff are assigned. By having the opportunity to only have two or to have hour shifts, it gives him the opportunity to work with those cases it order to help them manage back a slot that they have. It works out really well that way.

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Are you still able to have intake open during your normal business hours or are there times where intake isn't available? How many intake workers do you have?

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We have three intake staff. And each one of them takes two hours, two and a half hour shift because they overlap for about 10 or 20 minutes, they overlap. Our intake is open Monday through Friday 9:00 a.m. to 4:00 p.m.. Intake lines are constantly open. They are not closed and so even the overlap even helps with the queue. Keeps the queue from backing him too much. And so by having that -- none of them are on 9:00 a.m. to 4:00 a.m..

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My folks do short-term cases and community are rich education meaning? We have a fairly big staff. And money into our staff. At halftime person. About 25% of our agency. 25% of our work. It was enough that you have enough people. That was an organizational decision of course. It is hard work and it is work that is important to the agency. It is work -- taking people off the phone is gives you opportunities for professional development.

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Would you as a tool to prevent burnout and intake workers a break?

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It definitely prevents burnout. I can honestly say I have the opportunity, I was an intern here for a while before he became a permanent staff a few years back and during that time I was an intern I did intake from the time I got here until the time I went home. I would do the entire shift all by myself. It can definitely cause burnout. By having the opportunity to break out and not do it for that long a period of time, definitely is a good stress -- a good way of preventing burnout. Also doing other little silly things, I think a little earlier in this presentation, always being able to recognize somebody for a good job, bringing in donuts for no reason, or having a candy jar in my office. Any silly little thing you can think of that will help relieve stress and if somebody has a terrible call and they are stressed out about it, even if they are on intake at the time, they get off the phone for a minute and walk around and yell and scream and do whatever they have to do to relieve the stress. All those things are important. Because like I said earlier, the intake staff, the kind of calls you got all day long, probably everybody out listening to this can relate to what I'm talking about. The kind of calls you get all day long can definitely be stressful. Having a manager who is flexible enough to understand that an understandable that every now and then you need to walk away from it and take a break, that is fine. There are times when I will tell my intake staff that they are not going to answer the phone today and I will do the phones by myself all day long and let them do other stuff. Those other things are relievers that are phenomenal breaks.

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Thank you so much.

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If we're further questions, press star one on your touchtone phone.

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While we wait for that, I have a couple of questions that came in in the chow line or the chat box rather. Guest number three said as intake directors, do you have any good tips on how to conduct intake refreshers for existing staff or tips on how to train new intake staff?

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Mark, want to grab that?

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Sure. Starting with the doing refreshers for existing staff, you will look at teaching therapy -- Gary. One of the most effective ways adults learn is by teaching. I have made my staff, given them some responsibility for coming out with information that they think our entire team needs to know I'm break them into smaller groups. Two or three to develop -- and train on information we need to know. It may not always be something that they create themselves but they may go out and find somebody who is an expert on something we needed to know like we will have a trained tomorrow on Wednesday on the Affordable Care Act and get that information so they can get the latest on that. As for new stuff, we have an orientation process. It's important not to bring along people so quickly that they get thrown right into taking calls. On the other hand I have found that there's really no substitute for experience. I will have them sit with existing average it to listen to calls for a few days. To start with. We give them resources, we will hire someone he who has some significant expense. Been in on team. So this worker's and then one was people of John and they need a little bit of time to become macmac. We have our weekly in the morning on Wednesday morning. Sometimes will share information with each other.

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We have a few minutes left. Is there anybody in the queue

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No further questions.

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There is one more in the chat box. This is from Sarah press. When a caller seeks more then I&R, for example litigation, what are some tips you can manage -- for managing expectations of the initial intake call while they color waves a decision to see if the P&A can take their case or not.

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I will comment a little bit on that but I'm sure Mark will want to follow. One of the things that we always want to be careful with when we get callers who are looking for some kind of litigation is that we don't want to give them the impression that we are going to take their case at all. One of the things we try to do at the intake level is we simply want to gather the information. They want to keep asking if you're going to take the case and the only thing we can assure them is that we are going to take the information and pass it on to someone who will make that decision if we are going to take the case or not. We don't want them to hang up with the impression that we are going to take that case and handler for them. We want to be careful how we respond to their request and letting them know that all we're doing is gathering the information so it can be reviewed by somebody who can make that decision and they will be advised as to what that decision will be. We usually try to give them a timeframe, just so they know that they can expect a response. And we will say three to five business days in that they have not heard from someone they can call spectrum say I called and I have not gotten a response yet. The only important thing I wanted to stress here is we don't want to give anybody the impression we will take on their case.

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We don't do that. We explain our priorities. And they will make the -- even at that. Are advocates and attorneys. Will be doing investigation. To know whether I can so we will do investigation see if our agency is doing an investigation. With any particular course of action. The information we give people is a little sobering. We taken cases, we have enough staff to do about 5% to 6% of all the people who contact us. That's about what we have available to them. There are some things we are not going to do. Criminal case, divorce case, and a parent -- a parent wanting them to go with them to a in IPT meeting, we will tell them that right up front. That is what they're asking for an it is not something we can provide them. We will not make the culture decisions. . That is a decision that management has to make. That we try to give them a sense of the process or the timeline. Our decision and our casework call for the schedule within 48 hours and then practice the legal team meets once a week. We can tell them they meet on Monday. This is where they're going to -- case will be reviewed. We are not a crisis agency. Looking for someone to go running out to talk to some person or do something today, we are not going to do that in most cases. We find it is compelling that we will run into court and do something. Part of it is -- telling people with the processes, a sense of -- one of the core parts of our mission is to help people become advocates for themselves. It is good practice and because you don't have the resources to represent everyone. That helps.

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It is definitely 30 minutes after the hour so we have reached the end of this webinar. I want to personally thank John Ramsey and Mark McMillan's -- Mark McWilliams for their timing giving this webinar. And I also want to point out a few things. To the right on your screen, you can download, link to webinar evaluation. This is really important to NDRN for several reasons. Reporting purposes and also this INR quarterly webinar is a brand-new thing for us. We want your feedback on that. Just below that you have the opportunity to download the PowerPoint's that were shared with you today. If you have any questions that you did not get to ask whether you think of at 2:00 a.m., tomorrow, then you can reach me and I will say this and [ Indiscernible ] again, thank you very much for hang in there with us. I hope you got something out of this presentation. Thank you John, thank you Mark, thank you to our operator Joe, and we will see you down the road.

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Thank you ladies and gentlemen. This concludes today's conference. Thank you for participating and you may now disconnect. [ Event Concluded ]

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