

Check List for Telephonic CRB Reviews

Please plan to participate in the review day by phone and to lead your case(s) in which you are assigned. Continue to prepare for the cases as you normally would.

1. **Conference Line:** We will all use the existing conference line. Call **1-866-921-1127** and dial the **conference code** (given to you by your CRB Field Staff) when prompted. Say your name out loud and follow the commands.

2. **Your Space:** Choose a space suited to maintain confidentiality while having all documents in front of you and readily accessible. Be mindful of background noise and other distractions.

4. **Your Technology:** Think about your technology ahead of time. Please turn off “notifications” on your cell phone/email.
To MUTE your line, use the mute feature on your phone.
You can also press *6 to MUTE and #6 to UNMUTE.

5. **Board Business:** We will conduct Board business time together at the scheduled time. Please call-in promptly at the designated Board business time. We want to have ample time to ensure connectivity and to discuss cases. **TIP:** Once the line has been unlocked and the review begins, write down the names of participants as roll call is done.

6. **Opening/Closing Statements:** The opening and closing statement has been revised for phone reviews. Save the statement to your computer or print a copy to have available for the review. Board introductions will be done in a predetermined order.

Your Field Manager will designate a board member to read the opening statement every time and verify the order of introductions prior to the review day.

7. **“Disconnect All Lines” Protocol:** On rare occasion, your Field Manager may need to disconnect all lines to protect confidentiality.

1) Simply hang up. 2) Call back immediately. 3) Wait on hold, if necessary, until your Field Manager reestablishes the conference line.

8. Professionalism:

- a. **Conducting the Review:** Even though you are on a conference call, be fully present. The lead will present the case as usual. Field Staff will assist with group facilitation.

A few TIPS:

- Take notes to hold your attention in the absence of face to face contact. Make a list of additional questions. List the names of the people you'll want to address next to that finding.
- Remind parties to identify themselves before they speak and to speak one at a time. If you are not the lead, always identify yourself.
- Indicate to whom you are addressing your question.
- Additional Board members should refrain from interjecting with follow-up questions until prompted by the lead.
- When the lead prompts the board, be prepared for a response. We still need to hear from all board member when making a finding.

- b. **Verbal Demeanor:** Be especially conscious of your tone and vocal inflections as these are interpreted more accurately than facial expressions or body language. Be mindful of any comments you don't want others to hear. Please as always, avoid jokes or side chatting which may be misinterpreted or cause confusion.

- c. **Between Reviews:** Additional time has been scheduled between reviews. Although your Field Manager will be able to tell who is on the line and lock a conference call, out of caution, please refrain from comments between reviews that you don't want others to hear. At the end of the review day, there will be time to debrief and talk confidentially.

- d. **Schedule:** Be mindful of time allotted and put extra effort into remaining on task so we don't get behind on schedule. Participants for next review will be waiting on hold

- e. **Stay Trauma-Informed:** We want to proceed through reviews smoothly, professionally, and with consideration to all others on the line.

THANK YOU!