

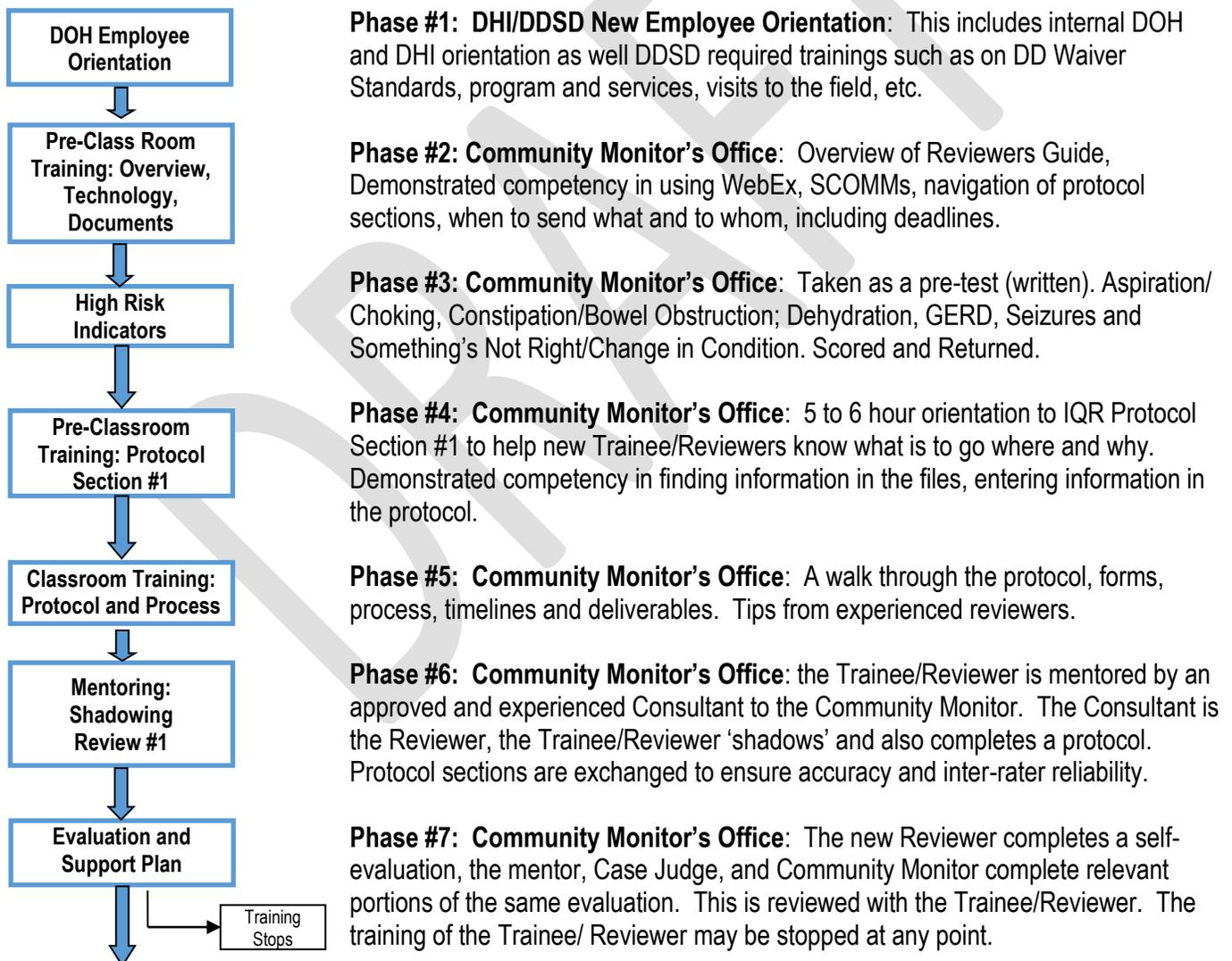


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Thank you for agreeing to be a Mentor!

As a Mentor, you are an experienced and approved Reviewer. You are part of a team of qualified and experienced professionals with the responsibility of evaluating services to persons who have Intellectual and Developmental Disabilities (I/DD). We look forward to you applying your expertise and insights in a way that will result in a trainee/potential new Reviewer becoming competent in the use and application of the Review protocols.

There are several phases of training for the Trainee/Reviewer. Those include:





Phase #8: Community Monitor’s Office: The Trainee/Reviewer conducts an actual Review as lead. The Consultant to the Community Monitor is the mentor and ‘shadows’ the Trainee/Reviewer at every stage of a full review. The training of the Trainee/Reviewer may be stopped at any point.

Phase #9: Community Monitor’s Office: The Trainee/Reviewer completes a self-evaluation, the mentor, Case Judge, and Community Monitor complete relevant portions of the same evaluation. This is reviewed with the Trainee/Reviewer. May result in Reviewer approval, further mentoring in specified areas or the training may be stopped.

Throughout the process identified above, additional training may be provided as identified and provided by DOH/DHI/DDSD and/or the Community Monitor.

We look to you to help the person you are going to mentor meet the Review Expectations for Reviewers and Case Judges which include, but are not limited to: (See detail in the 2018 Reviewers Guide)

- Review individuals as assigned.
- Conduct an initial record review and fill out the General Information Section of the protocol book **prior to the first interview**. Comprehensive completion of the Review Protocol Book is required.
- Acquire and review additional records, as needed. The Document Request Form **MUST** be used.
- Conduct and document interviews with the class member, available guardians, case manager and appropriate (day, residential, therapy, nursing, etc.) providers.
- Observe the class member in day and residential services through informed (by the file and interviews) and knowledgeable eyes.
- Consider all provided evidence prior to rating and documenting conclusions clearly.
- Due professional care and sound professional judgment is used in conducting the review and in documenting the rationale for ratings.
- Ratings are completed in line with protocol rating instructions.
- Clear and understandable written communications.

Not everyone can and should be an Individual Quality Reviewer. We will look to you and the Case Judge to provide feedback regarding the Trainee/Reviewer’s performance and ability to be a competent IQR Reviewer.

In an effort to ensure that all Trainee/Reviewers get the basic types of supports, we recommend – at least – the following. If you have more and better ideas please let us (Lyn Rucker and Paula Bigham) know. We’ll add your ideas and make this guide better.

Step 1. Shadowing, Observing and Evaluation

Be sure you have received and reviewed the Trainee Evaluation and Plan Template (1.14.18). You need to fill out all applicable sections routinely so that the information you are recording is current and accurate. Do not wait until the end of the review process to record how your Trainee/Reviewer is doing. The Trainee/Reviewer will also have this form and will be asked to complete a self-evaluation. Include examples of areas where the Trainee/Reviewer has done well and examples of where they need additional support.

Step 2. In advance of the Training, contact your Trainee/Reviewer:

As soon as you know who your Trainee/Reviewer is, please contact them. You may already know each other but this is the kick off of a different and more formal relationship. Pre-Classroom training will be conducted by Paula Bigham on January 16 and 22nd. You are welcome to sit in on that training to know exactly what will be covered as well as to get a sense of your Trainee/Reviewer's level of understanding. Please plan to sit with your Trainee/Reviewer during the onsite classroom training which takes place on January 30th and 31st, 2018. Your main job is to assist the Trainee/Reviewer, as necessary, to help him/her complete training and the entire review process. The 2018 IQR Training Team has already encouraged the Trainee/Reviewer s to be sure that:

- The Trainee/Reviewer has received the dates and times of the Pre-Class Room Training which will take place with Paula.
- The Trainee/Reviewer has received the onsite Class Room Training **Agenda**.
- The Trainee/Reviewer has received the 2018 **Reviewer's Guide**. They have been told but also reinforce as you can the fact that they need to read this **Guide** it in advance of the Class Room Training and before receiving the class member's file. This Guide will also tell them, at a minimum, what documents they should expect to find in their file.
- The Trainee/Reviewer has received the summary of **Expectations of Reviewer's and Case Judges**. Again, they need to read this several times before they receive their class member's file.
- Make sure your Trainee/Reviewer brings a **watch** so they can keep on time during the Review.
- Make sure your Trainee/Reviewer has supplies such as: **laptop, power cord and flash/portable drive!** If they don't know how to use them they should arrange for someone to help them learn prior to Training week. While we encourage the primary use of electronic documents, some Trainee/Reviewer s will want hard copies of some documents or may receive hard copies of documents during the review. These 'tools' may be useful for organizing documents received.

Remember that you and your Trainee/Reviewer constitute a "Team" so please sit together at Training, if possible. Remember what it's like the first time you go through a review... we all need as much support as we can get!

Again, when you note things that are missing or need to be done, give your Trainee/Reviewer as much information as you believe will be helpful so there is every opportunity for success.

Putting your instructions in writing back to the Trainee/Reviewer is essential. That way if there is a misunderstanding it can be corrected quickly and/or your instructions referenced as needed.

Step 3: Classroom Training

During Classroom Training

- Be as supportive of your Trainee/Reviewer as you can. Check in with them to be sure they are following what is being said and that they understand what is being conveyed in a way that they can use it during the Review.
- If you think that your Trainee/Reviewer does not understand the implications of what they are hearing, ask questions for them... others will be having the same problems so your questions will help.
- Make notes of areas that you would like to review with your Trainee/Reviewer after the Training just to be sure that expectations are clear.
- Encourage your Trainee/Reviewer to **mark** and make a note of any **areas reviewed during training that they don't understand** or believe they would benefit from more information.

After Classroom Training

- Go over any topic areas your Trainee/Reviewer has marked for additional information. If you need assistance in articulating expectations ask Lyn to join the conversation.
- If it is available Review the Trainee/Reviewer's **specific schedule** to be sure they know what they MUST have at the end of each interview/observation.
- Be sure the Trainee/Reviewer knows and understands what is expected.
- Establish contact expectations; times and location to meet with the Trainee/Reviewer
- Be sure your Trainee/Reviewer has **contact information** so they know how to get in contact with people if they run into problems. (They have been given this information electronically.)
- The Trainee/Reviewer knows that he/she will be receiving an electronic **class member's file** in advance of the Review AND that they MUST read the entire file prior to the scheduled phone interviews. They MUST read the entire file prior to the phone interviews and they MUST begin to fill out the protocol book. Specifically:
 - Fill out all of Section #1 of the Protocol based on the file review
 - Be sure Trainee/Reviewer s understand that all of the interview Sections (2, 3, 4, 5 and 6) have space for additional questions that the Trainee/Reviewer may need to ask to clarify issues found as a part of the file review, interviews and/or observations.
 - Be sure Trainee/Reviewer s understand that Sections 4 and 5 (day, employment, residential) have sections called "Items to Verify" which Trainee/Reviewer s should use to identify what they need to look for when they are on site interviewing/observing. For example, if the person is to be at a 90 degree angle when he/she is eating they should write that down as a cue so they check the angle the class member is sitting at when they visit him/her. If the person is to have a VOCA, they should write that down to be sure they ask about it and check to be sure it is working, being used across all environments and staff know how to support the person in its use, etc.
- The Trainee/Reviewer has the current version of the electronic protocol downloaded into their computer.
- The Trainee/Reviewer has practiced transferring documents to their Case Judge BEFORE the review begins.
- The Trainee/Reviewer knows they can go on the website and retrieve documents such as the Reviewers Guide, protocol sections, the calendar and so forth. The web site is jacksoncommunityreview.org.
- Review the "Additional Information" and "Reviewer Checklist" at the end of the Reviewers Guide to be sure all questions are answered.
- Review the Findings and Recommendations template and content probes to be sure new Trainee/Reviewer s are familiar with the expectations regarding content and timelines for submission to their Case Judge.
- Be sure Trainee/Reviewer s know to watch for Ruby Moore's feedback on the employment section.

Step 4: At least one week before the beginning of phone interviews.

As always, when you note things that are missing or need to be done, give your Trainee/Reviewer as much information as you believe will be helpful so that your Trainee/Reviewer has every opportunity for success.

- Be sure that the Trainee/Reviewer:
 - Knows who they are reviewing and who their Case Judge is. They should have received the Sample with this information from the Community Monitor's Office.
 - Be sure Trainee/Reviewers have and REVIEW their interview schedule with contact numbers and class member's addresses. They need to be sure they do NOT have conflicting interview times/double booking. Interviews conducted during the onsite week need to allow enough time between interviews so that the Trainee/Reviewer can travel and still be timely.
 - Be sure that they have received the **class member's file**.

- Be sure that they know they are to have the file prior to their scheduled phone interviews and that they know that they are to notify the designated Regional/DDSD Staff by Wednesday of their file review week if there are missing documents.
- Be sure they know that copies of everything go to Lyn Rucker and Paula Bigham.
- Be sure that they have copies of the **Document Request Form** and know how to use it.

Step 5: Week 1 – File Review & Phone Interviews

Before the Phone Interview Day 1 begins:

If you are the reviewer:

- Be sure that you know what questions your Trainee/Reviewer might want to ask each individual you are going to interview so you don't have two people asking questions.
- Be sure to arrange for the Trainee/Reviewer to be on the phone as a listener during interviews. This may be linking them in or using a conference line.
- Be sure you tell the person you are interviewing that there is a Reviewer-in-Training on the phone with you, introduce the Trainee/Reviewer and tell the person you are interviewing that the trainee will be typing the answers too in order to practice accuracy.
- Be sure you and your new Trainee/Reviewer BOTH type the answers so that you can get your Trainee/Reviewer's summary immediately following the interviews for comparison and coaching.
- Give quick feedback, in writing, to your Trainee/Reviewer. Given your interview schedule, that may be the next day.

If the new Trainee/Reviewer is the lead Reviewer and you are the mentor/shadower:

- The Trainee/Reviewer will conduct this review in total with you as his/her mentor.
- You must continue to participate in all aspects of the review.
- You must continue to ask for and receive documents as identified in Step 1 to 4 above.
- You must continue to receive sections of the protocol after each interview to ensure that accuracy is confirmed.
- In every case, you must be completing this review as if you are the reviewer so that the person being reviewed is protected and the accuracy and integrity of the information available and reported is impeccable.
- In every case, you must be sure that the Trainee/Reviewer is completing this review in line with guidance and your instructions to ensure that the person being reviewed is protected and the accuracy and integrity of the information reviewed and reported is fair, accurate and complete.

In general be sure that ...

- The Trainee/Reviewer should be filling out the **Document Request Form** if they find missing documents. The DRF should be shared with you and the Case Judge BEFORE it is submitted to be sure that all documents being sought are provided.
- Review your Trainee/Reviewer's Protocol Book Section #1 and other Sections as indicated to determine if the file has been read and the Protocol has been filled out in line with expectations and your instructions.
- Contact your Trainee/Reviewer as frequently as you think necessary to be sure that they have reviewed all of the documents in the class member's files and filled out their Protocol Book to the extent that they can. Ask them to send it to you electronically to check on their progress.
- If the Protocol Book has not been filled out in line with written and your verbal instructions please notify Lyn Rucker and the Case Judge. Note specifics on the **Trainee Evaluation and Plan Template** as well.

Always remind your Trainee/Reviewer to STAY ON TIME!

Information from others:

The Trainee/Reviewer may find that he/she needs information from others as a result of interviews and/or record reviews. If you believe documents, assessments, recommendations are missing have the Trainee/Reviewer complete the DRF and ask for them.

Do not hesitate to send the Trainee/Reviewer back for more information. It is imperative that scores reflect all information we can reasonably acquire during the review.

Phone Interviews: The Mentor should be on the phone interviews with the Trainee/Reviewer

Case Management Interview:

The Trainee/Reviewer will interview the case manager assigned to the class member by phone, unless other arrangements have been made through the regional office. If the case manager is new (30 days or less) the supervisor may sit in on the interview but the Trainee/Reviewer's questions should be directed to and answered by the case manager. The supervisor may NOT answer questions for the case manager; however, the supervisor may offer additional information AFTER the case manager has answered the question asked. The answers of the case manager should be recorded separately from the answers from the supervisor so documentation is clear in terms of who said what. If it is not clear, ask your Trainee/Reviewer to indicate in the protocol book who said what, include the initials of each to indicate their responses.

Guardian Interview:

The Trainee/Reviewer is to interview the Guardian of the class member on the phone if the Guardian is NOT a provider of Family Living Services. If the Guardian is also a provider of home-based services the Trainee/Reviewer MUST interview the guardian in the class member's home. Some guardians live out of town or out of state so phone calls are the only way to ensure an interview.

Nurse, Therapist and Behavior Support Consultant Interviews:

There are specific questions for the nurse, therapists and the BSC identified in IQR Protocol Section #2. In addition to the standard questions provided, these interviews give the Trainee/Reviewer the opportunity to clarify questions/issues that have come up as a part of the file review or through other interviews. PLEASE BE SURE THE TRAINEE/REVIEWER DOES SO. Do not hesitate to send the Trainee/Reviewer back for more information. It is imperative that scores reflect all information we can reasonably acquire during the review.

Step 6: Week 2: Site Reviews & Observations

Prior to the On Site Interviews: The Mentor should be present with the Trainee/Reviewer

The Trainee/Reviewer is expected to have reviewed the entire file before the interviews and on site week begin. Be sure that the Trainee/Reviewer has updated the list of missing documents and reviewed the received documents and updated the protocol as applicable.

During Interviews:

On Site Interviews: General

The Trainee/Reviewer should interview the direct support staff who know the class member best for all services including day, employment, and residential. Providers should have been informed during scheduling that the interview must take place with the Direct Support Professional who knows the class member best. If the direct care staff is new (30 days or less) the supervisor may sit in but questions will be directed to the direct care staff. The supervisor may NOT answer questions for the direct care staff, however, they may offer additional information AFTER the direct care

staff person has answered the questions asked. Be sure the Trainee/Reviewer notes answers that are given by the direct support staff vs. answers from supervisors or others. If the person who works most closely with the class member is not present for the interview BE SURE THE TRAINEE/REVIEWER NOTES WHY on the protocol book. If the interview took place with someone other than the direct support staff designated for interview, THE TRAINEE/REVIEWER SHOULD NOTE ON THE APPROPRIATE INTERVIEW SECTION OF THE PROTOCOL BOOK who they interviewed, how often this person works with the class member DIRECTLY and then let the Community Monitor/Paula Bigham know.

When rating the protocol book, the direct support staff answers should be given primary consideration unless it is obvious (through documentation and action of the Team) that the direct support staff is wrong. If this is an issue, contact the Community Monitor for consultation regarding scoring.

If there are multiple day services (employment, community access and Day Hab, for example) the Trainee/Reviewer may have to interview two or more direct support day staff. If that is the case, the Trainee/Reviewer should fill out separate day interview sections and indicate who was interviewed. Assure the Trainee/Reviewer knows the Employment and Day Interviews are scored together and that (+) and (-) justifications from all interviews are listed in the Scored Question Justification and a total score is determined by looking at all responses. Each (+) or (-) should be noted as to whom it refers (e.g., Employment, Day Hab Staff, Community Access Staff, etc.) Please be sure your Trainee/Reviewer provides BOTH scored sections to the Case Judge.

- Make sure they ask at the beginning of the Day and Residential interviews if the person they are interviewing is the one who works with the class member daily and knows him/her the best. If NOT, coach the Trainee/Reviewer to find out and document why the provider has not provided the direct support staff needed for the interview.
- Also, if the direct support staff is new (less than 30 days) a supervisor may sit in but may NOT answer the questions for the staff person. Again, intervene as necessary.
- Remind them that they are not to lead people to answers. They are to record, as best they can, exact answers to interview questions.
- If the person being interviewed does not understand the question, the Trainee/Reviewer should reword it to make it simpler and understandable. You may need to do that periodically to show the Trainee/Reviewer how to do this.
- Trainee/Reviewers are NOT to change the wording of questions so much they change the meaning.
- Trainee/Reviewers may NOT re-word questions in advance of interviews for any reason.
- Staying on time is key so move the Trainee/Reviewer along as needed.

Class Member Interview

The Trainee/Reviewer's schedule does include time to observe the class member wherever he/she receives day and residential service supports. The class member should be present in BOTH settings... it serves little purpose for the Trainee/Reviewer to observe where the class member spends his/her day, works or where the class member lives if he/she is not there. If the class member receives a combination of day services it would be good for the Trainee/Reviewer to observe them both. If the class member works and if **a visit is acceptable to the class member and to his/her employer**, the Trainee/Reviewer will observe the class member at work. If it is not acceptable to the class member and/or his/her employer then the Trainee/Reviewer will not be scheduled to visit the work site. If the class member is unable or unwilling to respond to the Trainee/Reviewer's questions BE SURE THE TRAINEE/REVIEWER NOTES that on the interview section of the profile document.

Individuals are to be observed during at least one meal time or snack. Preferably one during day services and one at home. The Trainee/Reviewer MUST have read the CARMP in advance of any mealtime/snack observation.

Residential Interview and Observation

- An observation of the residential site is REQUIRED. The regional office should have scheduled time to observe the individual in their home. If that was absolutely not possible, the site should still be observed even without the individual present. **Only the Community Monitor can provide an exception so please notify Lyn ASAP if there is a problem with observing the class member at home.**
- When you are in the home, be sure the Trainee/Reviewer looks for all adaptive equipment and assistive technology. They need to be sure they see it, know it works (ask the person and/or the staff to show you) and that it is being used as needed by the class member.
- Be sure to check the bathroom for accessibility and needed equipment. Also check front and rear exits to be sure that they are accessible and safe based on the class member's needs.
- If you observe unsafe or unhealthy conditions, take pictures with your phone of the environment while avoiding the faces of individuals served who may not be class members.
- You MUST be sure the Trainee/Reviewer checks the medication and fills out the information in the protocol book.

Day/Supported Employment

- As indicated above, if there are multiple day services (employment, community access an Day Hab, for example), the Trainee/Review may have to interview two or more direct support day staff. If that is the case, the Trainee/Reviewer should fill out separate day interview sections and indicate who was interviewed. Assure the Trainee/Review knows the Employment and Day Interviews are scored together. (+) and (-) scores from the interviews are listed in the Scored Question Justification and a total score is determined looking at all responses. Each (+) or (-) should be note as to whom it refers e.g., Employment, Day Hab Staff, Community Access staff, etc.

Class Members with Immediate and Special Needs

Assure the Trainee/Reviewer is advised of and indicates they understand the information regarding "Immediate Attention" and "Special Attention":

Immediate Attention: Class Members identified as needing "*immediate attention*" are persons for whom urgent health, safety, environment and/or abuse/neglect/exploitation issues were identified which the team is not successfully addressing in a timely fashion.

If you believe that someone you are reviewing may fall into this category CALL THE **COMMUNITY MONITOR AS SOON AS POSSIBLE** but not later than the same day you discover these issues and provide the information and concerns you have. Some issues may require that you NOT LEAVE the situation until it is addressed. For individuals found to have immediate needs where abuse, neglect or exploitation is suspected, you will be asked to complete an incident report and file it with DOH in addition to highlighting the class member's circumstances in the individual findings and recommendations.

Special Attention: Class Members identified as needing "*special attention*" are individuals for whom issues have been identified that, if not effectively addressed, are likely to become an urgent health and safety concern, in the near future. If you believe that someone you are reviewing may fall into this category notify the Community Monitor as soon as possible but not later than 24 hours from when you discover these issues and provide the information and concerns you have.

Step 7: Completing the Protocol

Completing the Protocol

- Please be SURE that there are no blanks in the protocol.
- Please be SURE that the Trainee/Reviewer has reviewed all of the material provided including, for example, BOTH ISPs provided (most current and the previous ISP), knows and has documented the frequency of implementation and if that is consistent with instructions in the ISP.
- DO NOT allow your Trainee/Reviewer to add scoring options. For example, if the options provided are 0, 1, 2 and 3 the Trainee/Reviewer MAY **NOT** put CND or N/A.
- You MUST be sure that your Trainee/Reviewer uses the (+) (-) format for justifying scores. The justification for a score must be for that question and must make sense and be understandable.
- DO NOT let the Trainee/Reviewer just put words like, “- *Speech Eval*” ... what does that mean? That the Speech Evaluation was not done, was inadequate, missing? Please be sure that anyone reading the protocol book would understand what your Trainee/Reviewer found which contributed to that score by using the +/- designation.
- Do NOT let the Trainee/Reviewer put their personal opinion regarding what has happened, e.g., “the Team tried their best”; the Trainee/Reviewer must relay facts.
- Do NOT let the Trainee/Reviewer justify scores just because someone “told them”. They need to look for multiple sources of evidence (documents, observation, interviews) for verification and cite those as justifications for their responses.

There are several questions in the Protocol Book that depend on each other. Please check these with your Trainee/Reviewer so they are consistent. For example,

- If #69 is scored No, then #70 to #92 are scored 0 or No.
- If #92 is scored a 0, 1, or 2 then #93 must be N/A
- Question #173 and #92 must be scored the same.

WHEN A SCORE IS CHANGED – for any reason – (e.g., Case Judging, obtaining new documentation within 48 hours), **BE SURE that the justification reflects the correct circumstances.** For example, if there were assessments missing, and the justification notes read “-no current dental, vision, H&P in file” as justification, but the case manager acquires and provides some or all of these missing pieces of information and provides them before the 48 hour deadline the score would be changed to a “3”. In addition to changing the score the Trainee/Reviewer must also change the justification to properly reflect the scoring.

Step 8: Writing the Individual Summary, Findings and Recommendations

Your Trainee/Reviewer should have a good understanding now of what is working well for this Class Member and what isn't. However, in some cases you may need to help your Trainee/Reviewer move from the detail to the “big picture” view of what all this information really means in terms of the quality of life this class member has. It may be helpful to start by asking your Trainee/Reviewer to summarize what he/she sees as the 5 most important issues for the class member, why and what the Team could do to most effectively correct these issues. It is also critical to get a picture of what good things are happening, why they are important and if supports are in place to ensure they continue. **Teams should be thanked for the many things they have done to support the person well.**

- Be sure that your Trainee/Reviewer has an electronic version of the Findings and Recommendations letter on his/her computer so that you can use that shell as you write findings and recommendations.

- Be sure your Trainee/Reviewer uses the INITIALS of the individual, NOT their name. The summaries are, overall, supposed to be non-identifying.
- If at all possible, try to have some “good news” for each individual reviewed. If there is no recommendation in a given area, there should at least be a ‘thank you’ for efforts on behalf of the individual and/or for participation in the review. This goes at the beginning of the letter in the “thanks to our partners” section... not in the findings and recommendations grid.
- If there is a time where there are multiple findings that all can be alleviated with the same recommendation, that should be listed as one finding with a, b, c under it – not as separately numbered instances. In other words, each finding should have a unique recommendation.
- Don’t forget to look at old findings (from prior CPR/IQR reviews) so that things that weren’t resolved or which come back up again get flagged as repeat findings/recommendations.**
- BE sure that each finding is cited with a corresponding scored protocol question, or have specific document reference information so that the finding/recommendation can be substantiated by going back to that question in the protocol.
- Ensure that the electronic version of the Summary, Findings and Recommendations are sent to the Trainee/Reviewer’s Case Judge in advance of Case Judging.

The Individual Findings and Recommendations Letter has guidelines regarding what topics should be addressed where. Please help your Trainee/Reviewer write with enough clarity and detail so that team members, regional office staff and others know:

- What was found and where;
- Why it was a problem;
- What has to be done to “fix” the problem?
 - The Recommendations must be written so that everyone knows how the recommendation is to be completed.
 - If a document needs to be developed or altered indicate when it needs to be done and why
For example, *“Rewrite the Work/Learn Section of the ISP and related Action Plan so that it more accurately and completely identifies who is going to do what to ensure that her preferred outcomes are met.” WHY? Per Lyn’s vision and stated preferences (see ISP dated 2/23/12) Lyn loves to work with horses, which is not mentioned in either the 2016 or 2017 ISP.”*
 - If an assessment was recommended but not attained, indicate **WHO** made the recommendation in **WHAT** document (including date) so the Team can go back to the source document.
For example, *“Marti’s mental health assessment completed by Dr. Black on 9/25/17 indicates “she should spend every February in Hawaii to avoid her winter blues”. This recommendation is not addressed in her 10/2017 ISP. Interviews with both the residential and day staff indicate that she does not spend every February in Hawaii.*
 - If the Trainee/Reviewer notes a problem in day and/or residential services please indicate which one so follow up can be done. For example, *“day staff were unable to identify Lucy’s preference for salads at lunch.”*

Step 9: Case Judging

Be sure that the Trainee/Reviewer knows he/she is to have the completed Protocol and written Individual Findings and Recommendations and provided them to the Case Judge by the time agreed to with the Case Judge. If you are going to be late, please negotiate a different time with your Case Judge as early as possible and let him/her know when to expect the book. Be sure to copy this correspondence or agreement to Lyn and Paula so adjustments can be made to their schedules as well.

Also explain to your Trainee/Reviewer that the purpose of Case Judging is to ensure that all facts and justifications are as clear, accurate and concise as possible. The Trainee/Reviewer and the Case Judge are a Team and jointly responsible for the product produced as a result of the Review.

You should also indicate to your Trainee/Reviewer that Case Judging may take a minimum of two hours or longer. They should be prepared to be engaged with their Case Judge for whatever time is required.

After Case Judging is complete, remind the Trainee/Reviewer to send a note indicating that he/she agrees with the scores and content of the Protocol and Findings and Recommendations. This note goes to Lyn Rucker and Paula Bigham with a copy to his/her Case Judge. If the Trainee/Reviewer does NOT agree with the content of the Protocol and/or the Findings and Recommendations, instruct him/her:

- #1. Identify specifically which scores, justifications, findings/recommendations are in dispute;
- #2. Identify the evidence he/she has to justify his/her position; and
- #3. Send that information to Lyn Rucker, Paula Bigham and the Case Judge as quickly as possible after Case Judging.

As a Mentor, please check with your Trainee/Reviewer's Case Judge to see if he/she would like to have you participate in the Case Judging of your Trainee/Reviewer. If the Case Judge would like to have you participate, remember NOT to answer questions for your Trainee/Reviewer. If the Case Judge needs information he/she will ask you.

Step 10: Summarizing with the Community Monitor

Please be sure that your Trainee/Reviewer knows that they need to contact and sign up to summarize with the Community Monitor. If possible, the Trainee/Reviewer should summarize with the Community Monitor soon after he/she has been Case Judged. The Trainee/Reviewer should allow an hour for this summation. The Trainee/Reviewer and the Community Monitor will meet alone so you do not need to plan to be present for this summary.

The summation with the Community Monitor should take place as quickly as possible post Case Judging.

Step 11: Status Summary

Be sure that your Trainee/Reviewer understands what will happen at the Regional Status Summary Meeting and what his/her responsibilities are during this meeting.

- Prior to the regional status conference the Trainee/Reviewer should ensure that he/she has access to documents which have been reviewed so questions can be quickly answered and documents references.
- Telephone participation in the Regional Status Summary for Trainee/Reviewers and mentors is mandatory so please be sure the Trainee/Reviewer has the date, time and expected order in which class member findings will be reviewed.
- Those attending should know that the Regional Status Summary will go as late as needed to summarize all class members reviewed.
- Since the Regional Office will have typed copies of the DRAFT Individual Findings and Recommendations, we will review these documents together. Trainee/Reviewer s should be prepared to answer questions to clarify what they found and the background circumstances, if necessary.

- DRAFT individual written findings and recommendations will be available for review by Regional Office staff as early as possible during the review week. The Community Monitor sends the Findings and Recommendations to the Regional Office.
- The Community Monitor and mentor will support the Trainee/Reviewer during the Regional Status Summary as needed.

Step 12: Evaluate the Trainee/Reviewer

Using the Trainee Evaluation and Plan Template, please evaluate your Trainee/Reviewer. You will also meet with the Community Monitor to summarize your view of the Trainee/Reviewer's performance. Be prepared to indicate what additional supports you would recommend for your Trainee/Reviewer if you feel he/she is not ready to conduct a Review on his/her own.

DRAFT