**Certification Review and Riese Hearing Remote Training Process and Expectations**

**Weeks 1-2: Observation**

Goal: Advocate is familiar with the hearing process and hearing-day logistics. Advocate has a feel for MHAP’s approach to representation. Advocate is comfortable calling into the units and getting a hold of clients at the various facilities. Advocate will review medical records with the trainer. Advocate can locate forms and information in folders. Advocate can navigate SJBH, VMC, and Jail.

Expectations:

Advocate will take notes about what they are learning about the hearing process, hearing day organization strategies and legal issues while observing the trainer advocate. Take notes of the facts of the case so the trainer can review whether you are recognizing the important information. Write down your questions as they come up and ask them when you debrief with the trainer in between units or at the end of interviews.

Advocate has their own file on the share drive with all important forms and information. Advocate will learn how to fill out intake paperwork, save files, perform timekeeping, and perform all logistics.

During the observation period, the advocate should not jump into phone or video conversations or interviews unless prompted by the training.

The advocate will receive information in written and PowerPoint form during this time and will do role plays with trainers.

Advocate will consider their own style of client interaction and how it will be tailored to performing the different aspects of hearing representation.

**Weeks-2-4 Advisements and Interviews**

Goal: The advocate has developed their own certification review and capacity hearing advisement that is clear, concise and accurate. The advocate can advise clients with a high degree of accuracy and assist clients in making a decision expeditiously. The advocate’s interviews touch on all the central issues in the cases. The advocate can make appropriate adjustments to timing with regard to the number of clients that need to be seen and advised. The advocate can build rapport with clients and has strategies for engaging reluctant clients. The advocate can review records independently and expediently for the most commonly reviewed aspects.

Expectations:

The advocate develops and memorize their own “script” for advising clients of their rights with respect to certification review and capacity hearings. The advocate will test this script on clients and receive feedback from the trainer on the language used, tone, style, and ability to build rapport.

The advocate becomes knowledgeable of the hearing options and practices assisting clients in choosing an option.

The advocate conducts their representation in a respectful, calm, and enthusiastic manner.

The advocate reviews a portion of the client’s records independently and the trainer reviews their notes.

The advocate practices interviewing clients, using the guide. The advocate receives feedback on the tone, thoroughness, and efficiency of their interviews.

The advocate responds to trainer feedback and asks clarifying questions if the feedback seems unclear, inconsistent, or otherwise not well understood.

The advocate observes in-hearing representation and takes notes on novel legal issues, questions about the process or hearing officer’s decision. The advocate shares these notes and questions with the trainer at their debriefing.

The advocate performs the writ referral advisement and writes up the writ referrals for clients who request them.

**Weeks 4-6 Hearing Representation**

Goal: The advocate can competently represent clients in the certification review and capacity hearings. The advocate can independently navigate remote hearings at the large facilities, including NoCo and SJBH. The advocate can independently handle hearing logistics and budget time appropriately. The advocate negotiates with doctors and nurses for voluntariness, discharge, non-refusal or other issues. The advocate thoroughly reviews records for hearing and can budget record review time appropriately. The advocate makes third party calls and drafts third party affidavits that meet legal standards and address important issues to the case. The advocate can issue spot the most common certification review and Riese hearing issues.

Expectations:

The advocate practices representing clients in all hearings and receives feedback from trainer.

The advocate manages all hearing logistics and receives guidance from trainer where needed.

The advocate negotiates with providers.

The advocate reviews records with little trainer assistance. Trainer reviews notes.

The advocate budgets the time for client interviews and advisements, record review, and third-party calls. The advocate explains decisions on time budgeting to trainer to ensure consistency, adherence to race equity practices, and appropriateness.

The advocate makes all third-party calls while the trainer is listening.

The advocate points out important legal issues to the trainer to ensure understanding of legal standards and application to facts presented.