
TELEPHONIC CASE CONFERENCING CALL ETIQUETTE

Preparing for the Call:

- Ø Find a quiet place
- Ø Be **prompt** when calling in
- Ø If possible use a landline
- Ø If using a portable phone, stay close to your phone to prevent static
- Ø Avoid the use of speaker phones to prevent an echo sound
- Ø Turn sound off of cell phones that may be nearby
- Ø Please have someone answering your other phones, or forward them so they do not interrupt the conference call
- Ø Avoid breathing into the mouthpiece, or eating food
- Ø Have the Call Agenda at hand

During the Call:

- Ø Dial the assigned teleconference number at the scheduled time
- Ø NEVER put conference members on hold
- Ø Participants should state their name to identify themselves when calling in
- Ø If joining the call after it has begun, wait to be welcomed before joining in the discussion, providing input, sharing resources, suggesting “next actions,” addressing possible transference/counter-transference issues, identifying possible pitfalls, etc. Colleagues will also provide feedback regarding use of clinical skills, core functions of care management, ethical dilemmas, documentation
- Ø State your name before sharing an idea or commenting during the conversation
- Ø Participants will problem solve if needed, etc.
- Ø Be courteous; do not interrupt
- Ø You must participate in the call and stay for the **entire** call in order to earn credit

NOTE: To mute or unmute your phone during the call depress *6.