



pilo  
assistance  
*ALPA: By your side*

# Understanding the Fundamentals of Case Work

# Rudiments of Case Work

- ▶ How/Why a Case is Generated
- ▶ How to Begin
- ▶ Phone Etiquette
- ▶ Case Receipt Checklist
- ▶ Case Resolution

# How/Why a Case is Generated

- ▶ Safety Concerns
- ▶ Personality Conflicts
- ▶ Performance Matters
- ▶ SOP and Operational Issues
- ▶ Harassment
  - (MEC Pro-Stans Chair)

# How to Begin the Case Work

- ▶ Careful Pre-Flight Planning
  - Take a Deep Breath, Don't Hurry
  - Gather All of Your Resources
  - Phone Availability, Scheduling Matters
  - Rehearse Your Initial Introduction

# Always Remember

- ▶ Confidentiality
- ▶ Be Unbiased/Neutral to Both Parties
- ▶ Announce You're Non-Disciplinary
- ▶ Do Not Pre-Judge Any Case
- ▶ Do Not Be Accusatory
- ▶ Do Not Be Confrontational
- ▶ Thank Them for Using Pro-Stans

# Proper Phone Etiquette

- ▶ Identify Yourself
- ▶ State Who You Represent (ALPA Professional Standards)
- ▶ Be Aware Of Time and Time Zone
- ▶ Set Specific Time For Follow Up Call
- ▶ Thank the Person For Sharing Their Concerns With Professional Standards

# Case Receipt Checklist

## CASE RECEIPT CHECKLIST and UTILIZATION GUIDE

ALPA Pro-Stans Policy Manual

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# Developing Your Case Resolution

- ▶ Gather All Your Factual and Verifiable Information
- ▶ Establish Order and Timeline
- ▶ Research Talking Points Within the ALPA Code of Ethics
- ▶ Conclude Areas of Personal Responsibility of Either or Both Parties
- ▶ Communicate Findings with Both Parties