

Office of Administrative Review

Managing Informal Conferences with Challenging Interactions



Purpose

This Tip Sheet provides general instructions, references, and resources to assist claims processors in handling telephone calls with challenging interactions.



Audience

All decision review operations center (DROC) higher-level reviewers responsible for conducting informal conferences.



References

- [M27-1, Part 1, Chapter 02, Handling Threatening or Abusive Interactions](#)
 - [M21-5, Chapter 5.3, Requests for Informal Conferences](#)
 - [Higher-Level Review \(HLR\) Informal Conference Worksheet](#)
 - [Crisis Call Management Tip Sheet](#)
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Tips

At the beginning of the informal conference, read the script within Section II (Acknowledgement) of the [Higher-Level Review \(HLR\) Informal Conference Worksheet](#) to the beneficiary.

If a beneficiary exhibits challenging or disruptive behaviors during the informal conference, use these recommended steps and/or follow locally designated procedures.



- 1) State that the behavior is unsuitable and request the beneficiary discontinue. Example: “I want to assist you, but I’m asking that you please stop using foul language.”
- 2) If the behavior continues, state, “If you continue to speak to me in this way, I will need to end this informal conference.” *Note:* Remind the beneficiary this informal conference is their opportunity to speak to VA regarding their case.
- 3) Should you need to end the conference because the behavior continues, state, “I am going to end this telephone call and informal conference now.” Say goodbye and end the interaction ensuring the use of a professional and appropriate tone.
- 4) After a telephone incident, set up an appointment with your immediate supervisor to debrief regarding what occurred.

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- 5) Immediately upon terminating the interaction, claims processors must submit VA Form 27-0820, *Report of General Information*, via an encrypted email to their supervisor to briefly describe and outline the situation and upload to VBMS.
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Important Reminders



- Remain calm.
 - Let the beneficiary talk without reacting emotionally or rushing to a solution.
 - Actively listen with understanding and empathy.
 - Validate the beneficiary's feelings and gain control of the meeting.
 - Do not match the behavior; prevent escalation.
 - Do not personalize the behavior.
 - Notify a co-worker or manager if the situation becomes threatening to self, the beneficiary, or others. Be aware of the procedures and resources available in the [Crisis Call Management Tip Sheet](#).
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Other Resources



- AMA Informal Conferences (VA 4564283)
 - Scheduling Informal Conferences (VA 4564453)
 - VBA Prevention and Management of Disruptive Behavior (PMDB) (VA 4635162)
 - Creating Positive Conversations with Challenging Customers (NFED 7010894)
 - Customer Service: Call Control Strategies (NFED 7000530)
 - Customer Service: Handling Abusive Customers (NFED 7006497)
 - Talking to Customers (NFED 7010419)
 - Facing Confrontation in Customer Service (NFED 4501234)
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Questions



Discuss any questions on this Tip Sheet locally with peers, experts, quality staff, and/or management. Management may route any questions requiring OAR assistance to OARADMIN.VBAWAS@va.gov.