

**Rock County**  
**Aging and Disability Resource Center**  
**Planning Committee**  
**Recommended Plan**

**December 2010**

<b><u>Table of Contents</u></b>	<b><u>Page</u></b>
Aging and Disability Resource Center of Rock County Planning Group: Rock County Staff.....	a
Aging and Disability Resource Center of Rock County: Steering Committee.....	b
<b>Introduction.....</b>	<b>1</b>
 <b>Administrative Framework Proposed for Aging and Disability Resource Center</b>	
Service Area.....	2
Governing Board.....	2
Organizational Structure.....	3
Staffing Plan.....	6
Staff Training and Qualifications.....	8
Location/Physical Plant.....	10
Accessibility and Cultural Competence.....	11
Management Information Systems and Reporting.....	12
Complaints and Grievances.....	13
 <b>Provision of ADRC Services</b>	
Marketing, Outreach and Public Education.....	14
Information and Assistance.....	16
Long Term Care Options Counseling.....	20
Elderly Benefits Counseling.....	23
Disability Benefits Counseling.....	25
Access to Publicly Funded Long-term Care Programs.....	26
Functional Screen.....	27
Financial Eligibility Determination.....	27
Transition from Waivers and Waitlists.....	28
Enrollment/Disenrollment Functions.....	29
Access to Mental Health and Substance Abuse.....	30
Access to SSI, SSI-E, Medicaid, FoodShare, and Other Public Programs.....	30
Short Term Care Coordination and Case Management.....	32
Access to Emergency Services.....	33
Access to (Elder) Adults-at-Risk and Protective Services.....	34
Transitional Services.....	35
Prevention and Early Intervention.....	37
Client Advocacy.....	39
Community Needs Identification.....	40
Customer Service Strategies.....	41

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## **Introduction**

On July 15, 2010, the Rock County Board of Supervisors authorized an Aging and Disability Resource Center (ADRC) Steering Committee. The purpose of the ADRC Steering Committee is to provide input and advise the County regarding an ADRC Implementation Plan. The Plan will be the basis for an application to the State of Wisconsin by Rock County to operate an ADRC. The following is a compilation of work approved by the ADRC Steering Committee, which commenced on August 4th, 2010 and ended on December 1st, 2010 with approval of its recommended Implementation Plan as contained herein.

Sections to the Plan were developed by the staff workgroup in support of the ADRC Steering Committee. The components of the Plan were presented to the ADRC Committee for its recommendation and approval over a four month period of time. These sections follow the State ADRC application format and include all modifications and recommendations made by the ADRC Steering Committee. The resolution authorizing the ADRC Steering Committee requested the recommended Implementation Plan be presented to the County Board in January, 2011. It is anticipated that subsequent to presentation, a resolution will be forwarded to the County Board that authorizes Rock County to submit a formal application to the state.

# **AGING AND DISABILITY RESOURCE CENTER of ROCK COUNTY**

## **A. Administrative Framework Proposed for Aging and Disability Resource Center Service Area**

The Aging and Disability Resource Center (ADRC) of Rock County will provide resources to those individuals with physical disabilities, developmental disabilities, frail elders, and those with mental health or substance abuse issues living in the Rock County area. It is not anticipated the ADRC of Rock County will expand its service area to other counties.

### **Governing Board**

The proposed governance for the ADRC will be twofold. The ADRC Board shall oversee implementation and operation of the ADRC as well as identify unmet needs in the community. These are the basic requirements of an ADRC Board. It is not anticipated that the ADRC Board will have any other responsibilities other than those set forth in State regulations. In addition a standing committee of the County Board will have budgetary and policy oversight of the ADRC. The decision to assign or create a standing committee that has policy oversight of the ADRC rests with the County Board. The ADRC Steering Committee recommended that the County Board establish a new standing committee that would have oversight of the ADRC.

It is recommended that the County Board appoint a 15-member ADRC Board. Authority for the Board, and its composition is provided under 46.283(6) of Wisconsin Statutes. At least one-fourth of the membership must be consumer representatives. Under state guidelines, a 15-member ADRC Board would have at minimum the following target group composition:

Number	Classification
1	Representative for the developmental disabilities
1	Representative for the physical disabilities
4	Representatives for the elderly

The other 9 members appointed by the County Board Chair would generally reflect the ethnic and economic composition of the County's population. The ADRC Steering Committee recommended designating one of the 9 at large members as the representative for individuals with mental health or substance abuse issues. In order to keep balance and continuity on the ADRC Board, it is recommended that members serve a staggered 3-year term. Thus, terms would expire for 1/3 of the members each year.

**Organizational Structure**

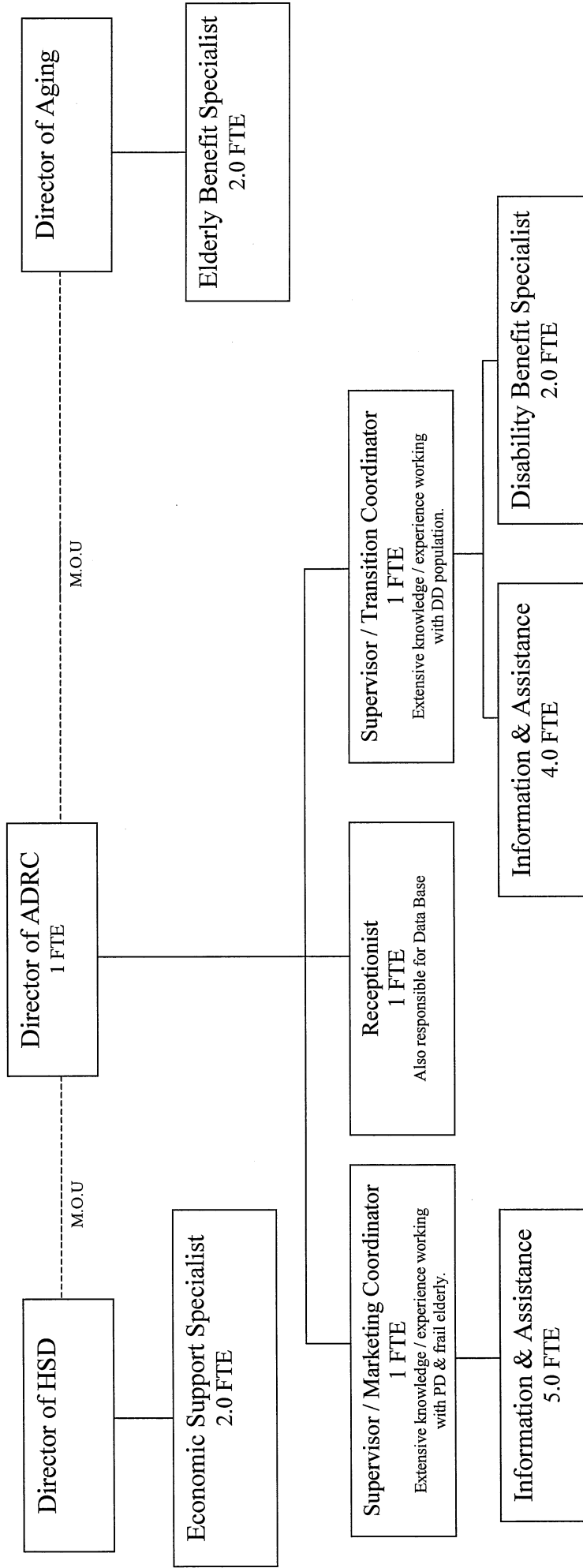
The table below contains the proposed ADRC organizational chart. It reveals the reporting relationships within the ADRC as well as external relationships. The solid lines represent supervisory and reporting relationships. Dashed lines represent external relationships through memorandums of agreement for ancillary support, such as Adult Protective Services and Economic Support Specialists through the Rock County Human Services, and Elderly Benefit Specialists and Prevention Programming through the Council on Aging. The table should not be construed as a placement of the ADRC into the County's overall organizational structure. The structure will be included in the ADRC application made to the State in 2011.

The ADRC Director and ADRC Supervisors will provide staff support to the ADRC Board. They are responsible for preparing agendas, staffing the meeting, and assisting the Board in meeting its Statutory responsibilities. The ADRC Director's responsibilities to a standing committee of the County Board and County Administrator will become clear based on the



ADRC's operational setting. Those responsibilities will be described in the ADRC application made to the State in 2011.

## Proposed Scenario – Organizational Chart



**Staffing Plan**

Rock County has the advantage of observing staffing levels of existing ADRC's prior to our anticipated start-up in November 2011. Rock County's approach to determine the appropriate staffing level started with a survey of 12 counties presently operating an ADRC.

That survey data with respect to staffing levels is contained in the table below.

**Twelve County Comparison of ADRC Staffing Levels - Average Ratio and Rock Staffing Level Calculations**

<u>County</u>	<u>Population</u>	<u># of I&amp;A</u>	<u>I&amp;A Ratio</u>	<u># of DBS</u>	<u>DBS Ratio</u>	<u># of EBS</u>	<u>EBS Ratio</u>
Douglas	44,477	3.5	12,708	0.5	88,954	1.0	44,477
Sauk	60,580	4.0	15,145	1.0	60,580	2.0	30,290
Portage	70,404	4.6	15,305	1.5	46,936	1.0	70,404
Jefferson	81,168	4.0	20,292	1.0	81,168	1.5	54,112
Walworth	101,476	8.0	12,685	1.0	101,476	1.0	101,476
Washington	131,030	6.0	21,838	1.0	131,030	1.0	131,030
Marathon	134,963	7.0	19,280	1.0	134,963	1.5	89,975
Kenosha	163,435	14.75	11,080	2.0	81,718	2.0	81,718
Winnebago	165,180	8.5	19,433	2.0	82,590	2.0	82,590
Outagamie	176,268	7.0	25,181	3.0	58,756	1.0	176,268
Racine	197,813	10.0	19,781	1.0	197,813	1.0	197,813
Brown	246,466	15.0	16,431	2.5	98,586	3.0	82,155
Average Ratio			17,430		97,047		95,192
<b>Rock County</b>	<b>160,544</b>	<b>9.2</b>	<b>17,430</b>	<b>1.7</b>	<b>97,047</b>	<b>1.7</b>	<b>95,192</b>

Notes: Population figures as of July 2009, source: DHS, Office of Health Informatics.

The average ratio of county population to staff for the job classifications of I&A Specialist, Disability Benefit Specialist, and Elderly Benefit Specialist of all 12 counties were

calculated. The population of Rock County was then divided by the ratios to calculate the staffing level for the Rock County ADRC. Those results are shown on the bottom line titled Rock County. In essence, the staffing levels are in full time equivalent positions (FTE) and represent an overall average staffing level of the 12 ADRCs included in the data set. If Rock County were to staff its ADRC at these levels, it should not be understaffed or overstaffed, all things being equal. The actual recommendation has been rounded to the nearest whole number of FTE and are as follows:

Job Title	FTEs
Information & Assistance Specialist	9.0
Disabilities Benefit Specialist	2.0
Elderly Benefit Specialist	2.0

There are additional supervisory and support staff in the table of organization for the ADRC. They include an ADRC Director, two Supervisors, and a receptionist. The ADRC Director will have responsibility to ensure the ADRC meets its contractual performance requirements with the State. Included in those responsibilities is the requirement to perform the community needs assessment. The Director also has responsibilities for hiring, evaluation and discipline of employees that fall under the supervisory span of that position. In addition, the Director is responsible for managing contracts, and developing and monitoring the ADRC budget. The Supervisors will have program responsibility in addition to supervisory responsibility. The job description for Supervisor will include the requirements for knowledge and experience working with individuals with physical disabilities, individuals who are elderly and/or individuals with developmental disabilities. One Supervisor will be assigned the outreach and marketing duties that all ADRCs are required to perform. It is the intention to find a qualified candidate for that position who has extensive knowledge and experience working with

individuals with physical disabilities and individuals who are elderly. The other Supervisor will be assigned the responsibility to work with public schools for the transition of children with developmental disabilities into Family Care. It is the intention to find a qualified candidate for that position who has extensive knowledge and experience working with individuals with developmental disabilities. The Receptionist will greet and direct the flow of walk-in traffic to the ADRC. The position will also have duties that include updating the Beacon database as well as clerical tasks.

The anticipated staff resources that will be requested to operate the ADRC are 19.0 FTE. Of that total, 4.0 FTE would work under the terms of Memorandums of Understanding with other County departments. Those positions include 2.0 FTE Elderly Benefit Specialists (Council on Aging) and 2.0 FTE Economic Support Specialists (Human Services).

**Staff Training and Qualifications**

The management and staff of the ADRC of Rock County will demonstrate general knowledge of all target groups served by the ADRC. Initially, staff will be hired based upon their prior experience working with at least one of the target groups. This will ensure each target group is represented at the ADRC. As ADRC staff work with the resource database and learn of the resources in the community, each will gain the general knowledge needed to serve consumers who utilize the ADRC.

Below is a chart indicating the position, education, and years of experience required and any additional, necessary requirements to be employed at the Rock County ADRC.

Position Description	Education/Degree	Years of Experience	Special Requirements
Information & Assistance Staff	Bachelor Degree or Waiver of Degree	1 year working with a Target population	AIRS Certified (w/in 1 yr) LTCFS Certified (w/in 1 mo) Valid Driver's license
Elder Benefit Specialist	Bachelor Degree	1 year working with Elderly	Valid Driver's license

Disability Benefit Specialist	Bachelor Degree	1 year working with individuals with disabilities	Valid Driver's license
Receptionist	High School	3 years office work	AIRS Certified (w/in 1 yr) Course in typing 40 WPM
Supervisor	Bachelor Degree	3-5 years social work experience  Experience with Target populations  Supervisory experience preferred	Social Work Certification LTCFS Certified AIRS Certified (w/in 1 yr) Valid Driver's license
Director	Bachelor Degree Or Masters	3-5 years supervisory experience  Experience with Target populations and in fiscal/programming	Computer proficiency (Excel) Valid Driver's license

Once approved by the Rock County Board, it is anticipated a Director will be hired in spring 2011 to assist in the transition. In addition to other planning activities, this individual will be responsible for creating an orientation program and training agenda for staff of the ADRC. Orientation will include but is not limited to the Rock County ADRC mission statement, functions and the role of the ADRC, policies and procedures, resource database and customer service standards. The Director will ensure continued training in these areas as well as offer additional training in subjects such as the target groups served and cultural competency. It should be noted that Elderly Benefit Specialists and Disability Benefit Specialists are required to follow a specific track of training provided by the Elder Law Center and Disability Rights of Wisconsin, respectively.

Various entities will be requested to assist in trainings such as the Area Agency on Aging, Rock County Human Resources and Information Technology Departments, and various public and private agencies. In addition, the Wisconsin Department of Health Services offers multiple webcasts including training on options counseling, Medicare and Medicaid, and several other topics beneficial to staff development and understanding of their roles at the ADRC. There will also be a budget dedicated to training to allow for offsite opportunities relevant to ADRC functions.

It is recognized that to have well-trained ADRC staff, the Director and Supervisors must also participate in ongoing training programs and have a constant awareness of what systems or processes need to be changed for improvement and what needs to be maintained for continued success. To accomplish this, the Director and Supervisors will attend the bi-monthly Statewide ADRC Directors meetings, quarterly regional meetings and monthly conference calls. Information shared at these meetings will be brought back for discussion and implemented as necessary.

The ADRC Director is also responsible for implementing a quality improvement plan which would include the collection and analyzing of data obtained from the Beacon/SAMS software, satisfaction surveys, and feedback from the Managed Care Organization (MCO). The quality improvement plan may also include the development of an internal quality improvement committee who would assist the Director in data collection and offer suggestions for improved service at the ADRC.

### **Location/Physical Plant**

A number of locations in the County were considered for the location of the ADRC. Among other things, criteria to consider when locating the ADRC include somewhere that is well-known to clientele, welcoming, has easy access via multiple transportation methods, is

accessible, and co-located with other services that may be needed by the population. In addition, locating the ADRC in a County-owned facility is desirable. Based on these criteria, the Rock County Job Center, located at 1900 Center Avenue in Janesville was selected as the site.

The space available at the Job Center currently accommodates the Long Term Support Division. This division will be dissolved shortly after the ADRC opens and Family Care is implemented. This space will meet the needs of the ADRC with some renovations such as building in additional private offices, a conference room and bathrooms, a separate entry into the ADRC and additional parking. The location is well-known, is on a bus line with plenty of parking, is accessible as it is located entirely on one floor, has economic support staff located on-site, and has other services available within the building. In addition, the Job Center is more centrally located in the County, being on the south side of Janesville closer to Beloit.

#### **Accessibility and Cultural Competence**

The ADRC of Rock County will comply with the Americans with Disabilities Act when modification of the existing building begins. Preliminary drawings indicate close parking to the main ADRC entrance and include six disabled parking stalls. In addition, an automatic door will be available for those unable to open a traditional door. Restrooms at the ADRC will accommodate wheelchairs with larger stalls, grab-bars, and roll-under sinks. Offices and meeting rooms will have wider doorways to allow wheelchairs easier access. In situations when consumers or family members are unable to get to the ADRC, staff will accommodate those needs by meeting in the location of the consumer's choice.

The ADRC of Rock County will also be prepared to assist those consumers who speak little or no English. Information taken from the 2009 Census Bureau indicates predominately English-speaking residents in Rock County with only 4.5 % Spanish speaking residents; therefore, brochures and other materials will be provided in English and Spanish. As the ADRC



develops and it's determined other languages are needed, additional materials will be produced. Other ways in which the ADRC of Rock County will meet the language needs of our community is by hiring bi-lingual staff, utilizing the phone translation line (Language Line) and contracting for interpreter services. All forms will be available in such a manner as to accommodate people with vision impairments. In addition, sign language interpreters and the TDD telephone system will be available.

Training will be provided to staff of the ADRC on cultural diversity. This will allow an atmosphere that is sensitive to differences among diverse cultures. The ADRC will also partner with other agencies that serve a particular population to enhance cultural knowledge and competence.

### **Management Information Systems and Reporting**

The ADRC of Rock County will comply with all required data collection and reporting requirements and ensure the accuracy and completeness of the data and its timely submission.

The Rock County Aging Department has implemented the Beacon software system and Beacon-Web for the purposes of the required resource database, consumer-tracking system and reporting which supports the provision of the required information and assistance services.

In order to meet requirements, the ADRC will have a staff position responsible for managing the resource database. This position will ensure the integrity of Rock County's data using standardized Department specifications such as the ADRC Activity Reporting Definitions, the Resource Database Inclusion and Exclusion Guidelines and the ADRC Activity Reporting Data Requirements. This position will also serve as a liaison with the Department to answer any questions and resolve issues regarding reporting requirements.

Per Professional Standards for information and assistance services published by the Alliance of Information and Referral System, Rock County's inclusion/exclusion policy shall be reviewed at least every three years.

### **Complaints and Grievances**

The ADRC of Rock County will develop due process procedures to review and resolve all complaints about services provided by the ADRC, including benefit specialists services. The ADRC Governing Board shall develop and approve grievance procedures as well as serve as the grievance committee. The procedure shall address the following:

- Who may file a Complaint/Grievance?
- How a Complaint/Grievance is filed?
- A mechanism for both:
  - 1) Informal resolution and
  - 2) Formal resolution
- How appeals will be handled, and
- Access to both the ADRC's and State's fair hearing process.

All ADRC staff shall be knowledgeable of the Complaint/Grievance procedure and how to assist an individual through the process (both informally and formally). If an individual requires assistance in filing a formal complaint/grievance with the State, the ADRC staff on behalf of the individual, will assist in the process.

The following are agencies and their addresses that may be involved in the Complaint/Grievance process:

Division of Hearings and Appeals  
PO Box 7875  
Madison, WI. 53707  
1-608-266-3096

Disability Rights Wisconsin  
16 N. Carroll Street, Suite 400  
Madison, WI. 53703  
1-800-928-8778

The Board on Aging and Long Term Care  
Ombudsman Program  
1402 Pankratz St., Suite 111  
Madison, WI. 53704-4001  
1-800-815-0015 (toll free)

**B. Provision of ADRC Services**

**Marketing, Outreach, and Public Education**

It will be essential for the community to be aware of the ADRC of Rock County within its area as well as its available programs/services. To assist in this "awareness" process, it will be important to market the ADRC in the following ways:

- billboards
- media (eg. television, radio, and newspapers)
- ADRC website
- ADRC booths at various fair and expo opportunities
- videos (available through the ADRC website)
- public information presentations
- local phone books
- newsletters
- social media (eg. Face Book, Twitter, etc.)

The above mentioned marketing strategies will not only provide the community with a general overview of the ADRC, but also the means to access services.

In order to reach all segments of the population of Rock County, it will be important to provide education regarding the ADRC to specific, targeted groups. These various groups would include, but are not limited, to:

- nursing homes
- school districts (eg. teachers, parents, students, administration)
- senior centers
- various non-profit organizations
- local builders associations
- health care providers
- law enforcement agencies
- transportation companies
- advocacy groups
- service providers (link from their websites to ADRC website)
- service groups and organizations
- veteran's organizations
- outreach entities
- United Way organizations
- County departments
- faith based organizations
- home health agencies
- chamber of commerce organizations

An ADRC staff member will be assigned the marketing and outreach duties described above.

An initial marketing plan with the various tactics described above will be developed and

followed to ensure the ADRC and its services/programs are marketed to the Rock County community.

The success of the marketing plan will be measured by tracking:

- number of incoming calls to the Aging and Disability Resource Center (ADRC)
- number of users to the ADRC website
- number of visitors to the ADRC
- satisfaction surveys
- steady increase of overall contacts to the ADRC within the first year
- number of returning visitors with a new need

In addition, during the initial discussions with visitors to the center, the Information and Assistance (I&A) staff will inquire as to how they heard about the ADRC to add yet another quantitative measure to the overall success of the ADRC marketing plan. This along with the aforementioned measures will enable ADRC staff to track and evaluate the effectiveness of its ongoing marketing efforts.

### **Information & Assistance**

I&A services will be provided via phone, mail, e-mail, and in-person. The ADRC of Rock County will offer I&A services a minimum of eight hours a day, i.e. 8:00 a.m. to 4:30 p.m., Monday through Friday, or by appointment. The ADRC will ensure continuous accessibility between the hours of 11:00 a.m. through 2:00 p.m. by staggering lunch hours. I&A staff will also be available to meet consumers outside normal business hours when necessary.

Walk-in consumers will be greeted by a receptionist who will conduct a quick assessment to determine if the consumer should meet with an I&A staff person. To respond to phone inquiries, a phone bank of I&A staff will answer all calls during normal business hours. If those

lines are busy, calls will go into a “queue” to hold for the next available staff member. After a time, the caller will be given the option of continuing to hold or to leave a callback phone number. A voice message will be left on the main telephone line for after-hours callers. It will provide information regarding the ADRC’s office hours, emergency 911, and the Rock County Crisis Hotline.

The I&A staff member who initially responds to a phone call inquiry shall follow the call through to its conclusion.

The policy of the ADRC of Rock County shall be to respond to initial inquiries and requests for information and assistance within 24 hours, or by the end of the next business day of receiving the request. To ensure privacy and confidentiality, the ADRC will have private meeting rooms available to accommodate walk-in consumers or those having appointments. I&A staff will have the flexibility to meet with consumers at a place of the consumers’ choosing.

Policies and procedures will be developed and implemented to address the needs of consumers who have visual, hearing and cognitive impairments, and other physical disabilities. Written materials, such as brochures, flyers, and forms, will be made available in Spanish, as well as other languages, if requested.

The “generalist” model will be used by the ADRC of Rock County, with all I&A staff being cross-trained and having knowledge to serve all target groups. Information and assistance activities will be staffed by persons who have four-year degrees (preferably in a health or human services related field) and with at least one year of experience working with at least one of the client populations of the ADRC, ensuring that the I&A staff represent a cross section of all the target populations. In the event an applicant does not possess a four-year degree, but has comparable work experience, a request for a waiver will be submitted to the Department prior to making a job offer.

After being hired, all I&A staff will be certified by the national Alliance of Information and Referral Systems (AIRS) as a Certified Information and Referral Specialist (CIRS or CIRS-Aging) or certified within one year after the ADRC opens. Along with training in the use of Beacon, I&A staff will receive training on issues and services that will be accessed by the target groups. They will be required to have knowledge of available services and agencies for each target group. ADRC staff will take advantage of training opportunities provided by the State and other affordable resources.

The I&A services provided by the ADRC of Rock County include:

- Assessing the needs of a consumer.
- Providing information that will meet the needs identified by the consumer and/or those identified by the I&A staff.
- Assisting with connecting the consumer with service providers.

All staff at the ADRC will have access to an electronic resource database. The comprehensive database will be managed and maintained with information required for the target populations. The I&A software and database that will be used is Beacon, a Synergy product. Current County staff has knowledge of and works with Beacon and Beacon-web. Information provided in the Beacon database was obtained directly from each agency or organization, from websites, local resources, and contacts. The database will contain information about local, regional, and national resources on such issues as housing, in-home supportive care agencies, respite care providers, public programs, health agencies, transportation, caregiver resources, and much more. The database is a work in progress and is updated as changes occur, as well as on an annual basis. An annual audit will review all information in the database for accuracy and completeness in accordance with AIRS standards.

Through the Beacon database, I&A staff will have the capability to provide information on resources for:

- Specific disability and long-term care related services such as living arrangements, in-home care providers, care management services, respite care providers and funding, equipment, training, transition planning, independent living skills and hospice care services.
- Costs associated with each resource, income and asset guidelines, and contact information.
- Long-term care insurance and other private resources.
- Health promotion and prevention workshops and services, recuperative care services and provider agencies, specific disease and health condition resources and services, medically related care services and provider agencies.
- Adult protective services, abuse, neglect, domestic violence, and financial exploitation.
- Behavioral health, such as mental health and substance use disorders.
- Employment, training, and vocational rehabilitation.
- Financial and other basic needs, e.g. Medicaid, Medicare, health insurance, food resources, shelter, transportation, financial aid for medical care costs and medications.  
(For financial services, the consumer may be referred to the Elderly or Disability Benefit Specialist.)
- Home maintenance, e.g. chores, yard work, home safety.
- Legal issues, e.g. power of attorney, guardianship, consumer rights, advocacy, discrimination, complaints and grievances.
- Education, recreation, retirement, life enhancement, and volunteerism.



The ADRC of Rock County will work with and provide education to community agencies that provide information and referral services. The agencies and service organizations in Rock County that provide information and referral services include, but are not limited to, United Way agencies, Love Inc., hospitals, food pantries, Salvation Army, schools, and the library system. The ADRC of Rock County will work toward being a recognized lead I&A service in Rock County for the target populations.

I&A staff will follow up with the consumer or service provider to determine whether the needs were met and if further assistance would be helpful. The purposes of follow up are to:

- Check on the safety of the consumer.
- Find out whether the consumer received the information that was sent.
- Ask “Is more assistance needed?”
- See if the consumer has more questions.
- Provide more assistance when the consumer is unable to do it him/herself.
- Develop rapport with a consumer who is likely to develop a need for additional assistance.
- Provide coordination of services and/or referrals.

Written policies and protocols will be developed for when and how follow-up to information and assistance service will be provided.

### **Long-Term Care Options Counseling**

The ADRC of Rock County shall provide counseling about the options available to consumers when making decisions for meeting their long-term care needs. Options counseling shall be performed by I&A staff and cover the following:

- A review of the consumer’s personal history, preferred lifestyle and residential setting, and goals for the future; functional limitations and capacities; financial situation; and

other information needed in order to help the consumer identify and evaluate options available.

- The full range of long-term care options available to the consumer, including but not limited to, home care, community services, residential care, vocational/day programs, nursing home care, and case management services.
- Opportunities and methods for maximizing independence and self-reliance, including the utilization of supports from family, friends and community and the self-determination approach.
- The sources and methods of both public and private payment for long-term care services, including:
  - Information about the long-term care programs that are available in the area for which the person may be eligible.
  - The functional and financial eligibility criteria for receiving publicly funded long-term care and for participating in the Medicaid fee-for-service system in order to assist the consumer in assessing the likelihood that he/she will be eligible.
  - Sources of payment for private pay consumers who do not qualify for publicly funded long term care.
- Factors that the consumer might want to consider when choosing among long term care programs, services and benefits, including but not limited to, cost, quality, compatibility with the consumer's preferred lifestyle and residential setting, outcomes of importance to the consumer, available resources, estate recovery
- The advantages and disadvantages of the various options in light of the consumer's situation, values, resources and preferences.

The ADRC of Rock County shall offer to provide long-term care options counseling:

- When the ADRC determines that the consumer might benefit from receiving long-term care options counseling.
- When a consumer, or person acting on his or her behalf, requests or indicates an interest in receiving information or advice concerning long-term care options.
- When the consumer is referred to the ADRC by a hospital, school, nursing home, assisted living facility, agency responsible for administering the long-term care waiver(s), or other similar source.

The ADRC will strive for ongoing collaboration with providers regarding their role in pre-admission consultations and what requirements must be met. Pre-admission consultations will occur in a timely fashion, but no later than five business days after receiving the request/referral.

The ADRC shall provide long-term care options counseling at a time, date and location convenient for the consumer, including but not limited to, the consumer's home or apartment. Options counseling shall involve one or more face-to-face meetings with the consumer and any family or others the consumer chooses to involve, unless the consumer prefers it be done by telephone, mail, e-mail or other means. Counseling may be provided to the consumer's family and other representatives acting on the consumer's behalf.

The information provided in long term care options counseling shall be timely, accurate, thorough, unbiased and appropriate to the consumer's situation. Long-term care options counseling shall be tailored to the needs of the consumer and shall not attempt to persuade the consumer to choose to participate in any particular long-term care setting, program or service.

Information on resources will be available through the electronic database information system. I&A staff will be trained on local resources by participating in local partnerships and coalitions of agencies and organizations that serve the target populations.

The ADRC of Rock County will routinely make contacts with community providers to educate the medical community, local community service providers, school districts, home health care agencies, supportive home care providers, etc. in order to market the availability of long term care options counseling through the ADRC.

### **Elderly Benefits Counseling**

Currently, Rock County maintains two full-time Elderly Benefit Specialist positions; one is employed by the Rock County Aging Department and the other is contracted by the Aging Department. Each specialist has an assigned geographical area of the county and works with those individuals in their area. Although both benefit specialists have full schedules, this arrangement has worked well for the community. Therefore, it appears this level of service is adequate in providing benefit specialist services for the ADRC of Rock County.

Elderly Benefit Specialist caseloads will be supervised by attorneys from the Elder Law Center which are contracted by the area agency on aging.

Elderly Benefit Specialist services will be available both at the ADRC as well as in the community. Office hours at the ADRC will be maintained on a consistent basis and each specialist will have a private office at the ADRC to ensure client confidentiality. Outreach sites such as senior centers, senior housing, meal sites, libraries, and churches will also have regularly scheduled hours, ensuring the Benefit Specialists are in the community and accessible to elderly consumers. The hours and sites will be advertised in the Aging Departments Senior Review newspaper which has a distribution of over 3000 including outreach sites. Additional public awareness of the Elderly Benefit Specialist services will be ensured by:

- Advertising in agency newsletters, newspapers, etc.
- Public speaking
- ADRC publications/resource materials
- Contact with the medical community

- Health fairs
- Disability network
- Aging network

The I&A staff at the ADRC of Rock County will often be the first point of contact. They will be trained to provide general eligibility information for public benefits and provide informational brochures for consumers to take with them. However, once it is determined the consumer's concern would be better served by an Elderly Benefit Specialist, the I&A staff will facilitate a contact with the Elderly Benefit Specialist or provide the consumer with the business card of the Elderly Benefit Specialist to call for additional assistance. Due to confidentiality issues between consumers and the Elderly Benefit Specialist, I&A staff cannot refer names of consumers to the Elderly Benefit Specialist unless the consumer signs an agreement allowing the Elderly Benefit Specialist to make contact with them.

The Elderly Benefit Specialist will specialize in topics such as Medicare and prescription drug coverage, Social Security benefits, as well as advocate on behalf of those individuals age 60 and older who have consumer rights issues, complaints, and/or grievances related to Medicare. The Elderly Benefit Specialist will also have some basic knowledge on topics related to those who would normally be served by a Disability Benefit Specialist. This will include collaboration on consumers who are age 59 and nearing their 60<sup>th</sup> birthday, depending on the need of the client.

The Elderly Benefit Specialist will be expected to attend all staff meetings. This will give the ADRC staff the opportunity to ask questions and receive information and updates regarding benefits.

## **Disability Benefits Counseling**

In order to ensure those adults ages 18 – 59 with physical disabilities, developmental disabilities, substance abuse disorders or mental illness, are fully served by the ADRC of Rock County, the ADRC will employ two Disability Benefit Specialists. These individuals will work collaboratively with the Elderly Benefit Specialists but will specialize in issues and benefits related to the above listed target groups.

The Disability Benefit Specialists will receive their initial and ongoing training through program attorneys from Disability Rights Wisconsin. Although funding for the Disability Benefit Specialists positions is not available until after the ADRC has been operational for six months, it is anticipated these individuals will be hired within the first six months so that appropriate training can be obtained and services can be offered immediately at month seven when funding is available. Supervision of substantive casework and consultation will be provided by the Disability Rights Wisconsin attorneys, however the ADRC Director will provide direct support and supervision to the Disability Benefit Specialists.

Disability Benefit Specialist services will be available both at the ADRC as well as in the community. Office hours at the ADRC will be maintained on a consistent basis and each specialist will have a private office at the ADRC to ensure client confidentiality. Outreach sites will be consistent with the Elderly Benefit Specialists and be held at such sites as housing complexes, meal sites, libraries, and churches as to ensure the Benefit Specialists are in the community and accessible to consumers with disabilities. The hours and sites will be published for distribution at the ADRC. Additional public awareness of the Disability Benefit Specialist services will be ensured by:

- Advertising in agency newsletters, newspapers, etc.
- Public speaking

- Distributing ADRC publications/resource materials
- Contacting with the medical community
- Participating in health fairs
- Engaging disability and aging networks
- Contacting school districts

The I&A staff at the ADRC of Rock County will often be the first point of contact. They will be trained to provide general eligibility information on public benefits and provide informational brochures for consumers to take with them. However, once it is determined the consumer's concern would be better served by a Disability Benefit Specialist, the I&A staff will facilitate a contact with the Disability Benefit Specialist or provide the consumer with the business card of the Disability Benefit Specialist to call for additional assistance unless the consumer signs an agreement allowing the Disability Benefit Specialist to make contact with them.

The Disability Benefit Specialist will specialize in providing information and assistance to adults with disabilities regarding how to access private and government benefits especially when trying to obtain a disability determination, consumer rights, grievances and appeals processes, employment referrals, and provide representation in administrative hearings or grievance steps.

As staff of the ADRC, the Disability Benefit Specialist will be expected to attend all staff meetings. This will give all ADRC staff the opportunity to ask questions and receive information and updates regarding benefits.

### **Access to Publicly Funded Long-term Care Programs**

At the time of its opening, the ADRC of Rock County will be the designated entry point for publicly funded long term care programs. The ADRC will establish policies and procedures, in

collaboration with the MCO and the Economic Support Division, to ensure that people who are eligible for and/or entitled to these programs have access to them.

### **Functional Screen**

The I&A staff will perform the initial functional screen to determine eligibility for prospective managed care enrollees. All I&A staff will be trained and certified in the use of the functional screen and provide long-term care options counseling. It is from the options counseling that the decision to perform a functional screen is made. The screen will be completed either at the ADRC or the person's residence. The consumer will decide where to hold the meeting and who to invite to the meeting. The screen will be completed by the assigned I&A staff worker within 14 days of the initial contact date with the ADRC.

### **Financial Eligibility Determination**

The Economic Support (ES) unit is responsible for financial eligibility determination. The ES unit will be located in the same building as the ADRC. The I&A staff will help the consumer understand the financial eligibility criteria, assist in gathering the necessary documentation to support the financial eligibility, and complete the Medicaid application and managed care enrollment forms. The I&A staff will perform a preliminary financial eligibility determination prior to coordinating a meeting between ES worker and the consumer. The ES worker will notify the I&A staff of final Medicaid eligibility determination. If the consumer is found to be ineligible for Medicaid the ES worker will refer them back to the I&A staff. If the consumer is found eligible, but with a cost share, the ES worker will provide the cost share amount to the consumer and the I&A staff. The application will be held pending confirmation from the I&A staff. If the consumer is found eligible with out a cost share the ES staff will notify the Managed Care Organization and I&A staff.



## **Transition from Waivers and Waiting Lists**

The number of people on the Human Services Reporting System (HSRS) waiting list 90 days prior to the beginning of managed care will determine the number of enrollments that the ADRC will complete each month during the 36 month transition period. The number of people in each target group (developmentally disabled, physically disabled, and frail elderly) at that time also determines the number of people from each target group that will be transitioned to managed care each month. New people will continue to be added to the waiting list, but they may or may not be enrolled in managed care during the initial 36 months.

During the transition from Waiver services to managed care, the ADRC will work collaboratively with the economic support division and the MCO(s). Policies and procedures will be developed to ensure that the eligibility and enrollment process is consistent and streamlined for consumers. Existing Waiver participants will be enrolled in managed care first. Existing Waiver participants through the Rock County Long Term Support and the Rock County Developmental Disabilities Board will transition to Family Care or IRIS within a six-month period after the implementation of Managed Care.

At the time of its opening the ADRC will manage the wait list for managed care enrollment. At the start of managed care, individuals will be taken from the wait list in first come, first served order by target group based on the monthly number of enrollments established at the 90-day mark previously mentioned. A person who meets “crisis need” criteria may bypass the wait list and be served out of the first come, first served order as outlined in the Department of Health Services memo DLTC 2009-11 “Medicaid Waiver Wait List Policy Requirements”:

1. An urgent need that is identified as a result of any of the following:
  - a. Substantiated abuse, neglect or exploitation of the individual in his/her current living situation; or

- b. Death of the individual's primary caregiver or the sudden inability of that caregiver/support person to provide necessary supervision or support and there is no alternative caregiver available; or
  - c. Lack of an appropriate residence or placement for the person due to a loss of housing; or
  - d. The person has a documented terminal illness with a life expectancy of less than six months, based upon the opinion of a medical professional appropriately qualified to make such a determination; or
  - e. A sudden change in the person's behavior or the discovery that the person has been behaving in a manner that places the individual or the people with whom the individual shares a residence or the community at large at risk of harm.
2. A finding by the county waiver agency that the health and safety of the individual is in jeopardy due to the primary caregiver's physical or mental health status; or
3. A determination by the county waiver agency that the person is at imminent risk or a more restrictive placement to an ICF-MR or nursing home or other institutional setting; or
4. A finding by the county waiver agency that other emergency or urgent conditions exist that place the individual at risk of harm.

**Enrollment/Disenrollment Functions**

I&A staff will provide enrollment counseling to consumers, their families or other representatives, who are eligible for Family Care or other publicly funded benefits, e.g., Include, Respect, I Self-Direct (I.R.I.S.). I&A staff will present all available information on current programs and providers. I&A staff will remain objective and in no way attempt to persuade the consumer to choose one program over another.

I&A staff will also provide disenrollment counseling to assist consumers in the process of voluntarily or involuntarily disenrolling from Family Care or other publicly funded programs. This will include providing information about consumers' rights, grievance and appeal procedures, and advocacy resources. The I&A staff will also discuss service and program options if disenrollment occurs.

### **Access to Mental Health and Substance Abuse Services**

The ADRC of Rock County will provide I&A and Disability/Elderly Benefits services to consumers with mental health and substance use issues. Resources on Rock County's mental health and substance abuse services will be listed on Beacon. For consumers who do not have access to the Internet, brochures with this same information will be created and made available for distribution.

ADRC staff will be knowledgeable of community mental health and substance abuse resources and know how to access those resources. Professionals in mental health and substance abuse will be invited to staff meetings to provide information and training on identification and response to mental health and substance abuse issues.

To assist consumers in accessing appropriate mental health and substance abuse services, ADRC staff will refer consumers to various community agencies. Consumers with insurance will be referred to private health care providers. Consumers with few or no financial resources have the option of community sliding fee scale service providers or other County services. The ADRC will develop policies and referral procedures related to this service area.

### **Access to SSI, SSI-E, Medicaid, FoodShare and Other Public Programs**

When an individual contacts the ADRC of Rock County and is interested in receiving benefits or services from various programs, the ADRC will refer that individual to the appropriate agency for a determination of eligibility to receive those benefits or services. Some of the key programs and agencies to which the ADRC expects to make referrals include:

- Rock County Council on Aging
- Rock County Human Services Department
- Social Security Administration
- Rock County Developmental Disabilities Board
- Rock County Veterans Service Office
- Public Housing Authorities
- Rock County Health Department
- Community and faith-based organizations identified in BEACON

The above list is, by no means, all-inclusive but does include the key programs and agencies to which the ADRC will make referrals.

The ADRC will work collaboratively with agencies in an effort to obtain the needed and desired services for Rock County citizens. The ADRC will establish a Memorandum of Understanding (MOU) with agencies, as needed, to aid in the referral process.

The ADRC will resolve potential issues of access and follow-up through the use of a referral protocol. That protocol is:

- ADRC staff will provide the consumer with information on appropriate resources.
- ADRC staff will ask if the consumer wants assistance from the ADRC in contacting those resources.
- If assistance is requested, the ADRC staff will, on the consumer's behalf, contact the resource(s), through phone or e-mail.
- If the consumer chooses to contact the resource independently, s/he will be encouraged to re-contact the ADRC if further assistance is needed.

- If the consumer comes into the ADRC s/he will be asked to sign a release of information to give ADRC staff the ability to verify that services have been accessed.
- If the consumer requests the ADRC to follow-up with a resource provided during a phone contact, a release of information will be mailed to the individual for signature and return to the ADRC.

### **Short-Term Care Coordination and Case Management**

The ADRC of Rock County will provide short-term care coordination and case management to assist individuals and their families in arranging for services. Short-term care coordination and case management is assistance in identifying an individual's long term care service needs, providing information on meeting those needs, assisting the individual in getting connected with those services, monitoring their effectiveness and, if necessary, recommending modifications of those services. The ADRC short-term care coordination and case management services will also include information and assistance, long term care options counseling for those not eligible for government funding, elderly benefits counseling, disability benefits counseling, transitional services to those 17 years and six months of age and older, and coordination of adult protective services with the system charged with that responsibility.

To further clarify short-term service coordination, the definition of "Brief Services" shall be used. The Wisconsin Department of Health Services has defined "Brief Services" as follows:

"Brief services occur as an outgrowth of I&A activities. Activities move beyond referral, assistance and follow up. Brief service cases are those where staff are directly involved in setting up one or more services; and activities include some care planning and initial goal setting. They are cases which traditionally might be "open ended for service" as a short-term case (30 to 60 days). They are cases where I&A staff must track the case disposition. Often they require several contacts. They also include cases

where the person is not referred for long term case management, but I&A staff are providing some short-term intervention.”<sup>1</sup>

The ADRC will ensure that short-term services do not become long-term by following a policy that describes short-term care coordination and case management as 60 days or less, identifies the criteria that defines individuals that should receive such services, and sets procedures for dealing with needs that exceed the scope and limits of such services.

When a case has been active for 60 days, the involved worker will bring it to the attention of supervisory staff. The case will be reviewed at the next scheduled ADRC management team meeting and a final determination will be made as to whether there is a need for ongoing services. If the team determines there are no unmet needs, the worker shall make one more contact with the client to terminate services, and close the case. The case shall only be reopened if the ADRC is again contacted by the consumer or on behalf of the consumer about another issue or there is a change in status in regard to the initial issue.

### **Access to Emergency Services**

The ADRC of Rock County will develop protocols to ensure consumers are connected promptly with appropriate providers of emergency services during and after business hours. ADRC staff will receive training to effectively recognize contacts that are emergent in nature. Training will cover areas such as how to collect needed information, de-escalate upset consumers, and recognize symptoms of medical issues, e.g., heart attack, stroke, suicidal ideation, etc.

The ADRC will have a MOU with emergency service providers, such as the Rock County Crisis Intervention Unit, the 9-1-1 Center, local hospitals, local mental health clinics, and other emergency service agencies, defining how emergency calls will be handled. The ADRC

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<sup>1</sup> (2005 Wisconsin ADRC contract)

will have an MOU with the MCO(s) regarding the handling of emergency calls concerning their members.

An ADRC staff member will handle phone calls during business hours. In emergency situations the ADRC staff member will be able to warm transfer the caller to 911 or Crisis Intervention. The after hours message system will contain information indicating that the caller should hang up and call the appropriate emergency services provider.

### **Access to (Elder) Adults-at-Risk and Adult Protective Services**

The ADRC of Rock County staff will be trained in interviewing techniques and active listening skills. ADRC staff will be well versed in both Chapters 46 (Elder Abuse/Neglect) and 55 (Protective Service System) of the Wisconsin State Statutes. ADRC staff will determine the needs of each consumer and connect the consumer with the agency responsible for:

- (Elder) Adults-at-Risk abuse and neglect services
- Voluntary or court ordered protective services under ch. 55, Wis. Stats., when needed to protect an individual or protect others from the individual
- Law enforcement, domestic violence, mental health services and emergency detention under ch. 51, Wis. Stats., when needed
- Guardianship
- Watts reviews
- Representative payee
- Domestic violence services involving vulnerable adults
- Sexual assault victim services involving vulnerable adults
- Assistance in obtaining physical custodial care, housing, medical care, medications and food

Rock County's (Elder) Adults-at-Risk Interdisciplinary Team (I-Team) has developed a public information/education subcommittee. They have written material available and the ability to provide presentations regarding the warning signs/symptoms of abuse and neglect. The I-Team resource will be used to educate school district staff, health care providers, hospital staff, caregivers, financial institutions, and other service providers on (Elder) Adults-at-Risk issues. The subcommittee will also inform the community that the ADRC is the place to contact if you have concerns regarding a suspected abuse/neglect situation.

Rock County Protective Service Workers will have office space in the ADRC. This will assure an efficient response in these investigations.

A MOU will be developed between the ADRC and all law enforcement agencies within Rock County. The MOU will describe the respective agencies responsibilities regarding domestic violence of vulnerable adults and other (elder) adults-at-risk cases.

An MOU will be developed between the ADRC and the managed care organization(s) (MCO) regarding cases of (Elder) Adults-at-Risk where the consumer is a member of the MCO. The MOU will detail respective responsibilities in these situations.

### **Transitional Services**

Transition of youth with disabilities into adult services is an important function of the ADRC. The ADRC will strive to provide young adults a seamless transition from the middle and high school system to adult services. To accomplish this task, the ADRC will assign these duties to a Supervisor. This position will serve as the main contact for all transitional planning.

The transitional coordinator within the ADRC will do a significant amount of outreach to ensure that young adults and their families receive necessary information and education to make future plans.



The ADRC will reach out to youth and families by:

- Establishing strong relationships with all secondary Rock County schools (including private and State). These relationships are important since the schools are in daily contact with youth and their families. The schools will help “spread the word” about the ADRC role in youth transition.
- Attending student conferences and Individualized Education Programs (IEPs) when requested, once the student turns 18 years old. Request for attendance at a meeting for youth under the age of 18 years will be referred to the MCO or their designee.
- Educating teachers, special education directors and district transition specialists about the role of the ADRC and long-term care.
- Assuring that all secondary Rock County schools have a supply of the ADRC brochure to give to students and their families.
- Educating parents and students with disabilities about the role of the ADRC and long term care options that may be available during and after the transitional period. This may be done through school open houses, parent’s night, scheduled presentations at the schools, local town meetings, etc.
- Strongly encouraging parents/guardians of youth to contact the ADRC when the student turns 17 years, 9 months old. Once contacted, the transition coordinator will engage in options counseling with the young adult and if interested, eligibility for long-term care will be determined.
- Referring questions about youth under the age of 17 years, 9 months to the Rock County Birth to Three program, Children’s Long Term Care Waiver Program, current school district or local advocacy groups (as deemed appropriate).

The ADRC of Rock County will work closely with community agencies to assure that youth and their families receive accurate information regarding the role of the ADRC and long term care options. Examples of community agencies, may include:

- Department of Vocational Rehabilitation
- CESA II
- Department of Public Instruction
- Managed Care Organization and Include, Respect, I Self-Direct (IRIS)
- Rock County Human Services (Children's Long Term Waiver Case Managers)
- Catholic Charities (Children's Long Term Waiver Case Managers)
- Lutheran Social Services (Autism Waiver Case Managers)
- Rock County Developmental Disabilities Board
- Local advocacy groups

The ADRC of Rock County will have resources that will enhance the transition process for youth and their families. The goal of the transition coordinator will be to develop strong relationships within the secondary schools in the hope that the information will then be shared with youth and their families.

### **Prevention & Early Intervention**

The ADRC of Rock County will incorporate activities that promote healthy lifestyles, provide early intervention strategies and reduce the risk of disabling conditions. Prevention and early intervention services provided by the ADRC will be based on the community needs identified by its governing board. The governing board and staff will determine what prevention and awareness programs/resources already exist in the county by surveying community agencies such as Partners In Prevention, Rock County Youth 2 Youth, United Way, UW-Extension, Developmental Disabilities Board, Public Health Department, Fire/Law Enforcement

Department, Human Services/Child Protective Services, Rock County Aging Department, community health surveys and other departments and appropriate community-based organizations.

Rock County's Aging Department has trained staff to promote and provide two of the initiatives of the Wisconsin Healthy Aging Institute; Stepping On Falls Prevention Program and Living Well with Chronic Conditions. The Aging Department also offers the evidence-based Healthy Eating for Successful Living in Older Adults program.

I&A staff will be trained to screen for risk factors associated with long-term illness and disability (screening defined as, but not limited to, self assessment tools and questionnaires related to a consumer's personal situation, recent falls, proper protective bike gear, car seats, seat belts, nutrition, drug and alcohol, etc.) As a routine part of information and assistance and long-term care options counseling, the ADRC will be alert to potential risk factors in the person's situation, identify opportunities for prevention and early intervention and, where appropriate, provide specific prevention advice and education to individuals in its target populations. Staff will distribute written materials related to identified risks for consumers and/or their family members as well as make referrals to appropriate community entities.

The ADRC will coordinate with public health agencies and community service providers to secure resources for effective prevention programs. The ADRC will develop linkages with, and refer consumers and/or family members to, public health agencies and other entities that have a public prevention, early intervention, disease management and/or health literacy focus. Agreements/memorandums of understanding with these community organizations will be developed.

## **Client Advocacy**

The ADRC of Rock County as a whole, will provide individual advocacy to consumers, their families, and/or representatives. Advocacy is the primary role of every employee of the ADRC. All employees of the ADRC will have job descriptions indicating their responsibility to advocate on behalf of consumers.

Consumers will be informed of their rights in a variety of ways. The ADRC will utilize posters, brochures, and its web site to communicate consumer rights regarding access to publicly funded programs in both English and Spanish. The ADRC will also make accommodations for consumers who need interpreter services. In situations that require a higher level of technical knowledge consumers will be assisted in linking with appropriate advocacy agencies such as Legal Action of Wisconsin, Disability Rights Wisconsin, Department of Public Instruction, Independent Living Center (Society's Asset's), Ombudsman program, mental health/AODA and developmental disability advocacy groups, volunteers, and other local resources.

When Family Care is operating in Rock County, the ADRC of Rock County will advocate for consumers who are denied access to the Family Care benefit. Should a consumer be found ineligible for the Family Care benefit, an I&A staff will inform them of their right to appeal the decision and provide assistance to help with the appeal process.

Rock County intends to operate an ADRC independent from and completely separate from a MCO. Although an MCO has not yet been selected to work with Rock County, it is understood that when a MCO is selected, the county will work in cooperation with the MCO to identify any conflicts of interest that could potentially exist. Should any conflicts of interest be identified, a policy and procedure will be developed cooperatively with the MCO and ADRC staff will be trained on the policy.

It is the goal of the ADRC of Rock County to work cooperatively with the MCO when issues involve consumers. By working together it is hoped issues can be resolved at the local level. ADRC staff, the MCO's quality assurance staff, and the consumer will attempt to reach a mutual agreement whenever possible. If the consumer remains displeased with the MCO's action and requests further advocacy the ADRC will refer the consumer to the appropriate outside advocacy agency.

The ADRC of Rock County will also collaborate with organizations such as, but not limited to, Partnership for Older Adults, Wisconsin Association for Retarded Citizens, Homeless Intervention Task Force, local school districts, the Transition Advisory Committee of Rock County, Special Olympics and the Caregiver Coalition as well as other ADRCs to advocate for systems change on policies that affect consumers of the ADRC and MCO. We will be careful not to duplicate the efforts of other coalitions to maintain efficiency with our resources. The ADRC of Rock County will advocate for the funding of provided services, funding to fill unmet community needs, and other issues that will benefit consumers of the ADRC.

### **Community Needs Identification**

The ADRC of Rock County will secure input to identify the unmet needs of consumers using, at a minimum, the following:

- The consumer will be asked if his/her needs have been met or if he/she anticipates them being met as a result of ADRC involvement.
- ADRC management will obtain feedback during regularly scheduled staff meetings from internal staff regarding unmet needs they have identified.
- ADRC staff will follow-up with consumers following the initial contact to the ADRC to further identify any unmet consumer needs.

- A brief satisfaction survey will be available to the public through the ADRC website.
- ADRC management will evaluate the community needs assessments that are available through the local United Way organizations.
- Contacts with service providers.
- Ongoing dialogue with the MCO will be established to address various issues such as unmet needs.
- Collaboration with community organizations.
- ADRC staff will use available local media sources to identify unmet consumer needs.

The ADRC management and governing board will utilize the above mentioned methods to obtain input on unmet needs to assess the current system and to propose any necessary changes to better assist consumers. The information will allow management to better develop services to meet consumers' needs. In addition, it will be a part of the ADRC's ongoing assessment efforts as it pertains to service delivery gaps.

### **Customer Service Strategies**

One of the goals of the ADRC of Rock County is to provide staff who are friendly to all who walk through the door, empathetic to their needs and concerns, and knowledgeable of the resources available. The first person a consumer will speak to when they walk through the entrance is a receptionist who will warmly greet them and conduct a quick assessment to determine which ADRC staff they will speak with. This receptionist will be well trained in the programs offered through the ADRC and aware of which staff has specialized knowledgeable in those programs. General concerns and/or questions dealing with assistance in the home, resources in the community, or eligibility for public programs will be directed to I&A staff.

Specific issues, such as transition into adult programs, public benefits and/or legal questions, or elderly and adults at risk will be directed to those staff who specialize in those topics.

Consumers who visit the ADRC will wait in a sitting area while the receptionist calls the appropriate staff and provide details of the situation and reason for the appointment. By providing the staff with an explanation for the visit, it is hoped this will limit, to the extent possible, the consumer having to tell “their story” for a second time. Depending on the number of people, the ADRC staff will escort the consumer and/or group to a space appropriate for a private conversation. It will be determined through this conversation what the next step will be: community resource options may be given, an explanation of the available public benefit options and eligibility requirements, completion of the Long Term Care Functional Screen, or if the consumer needs more than what the staff can provide, they will be referred to the proper advocacy group, service provider, or agency.

For those individuals who meet eligibility requirements for Long Term Care programs such as Family Care or IRIS, the I&A staff will assist the consumer in understanding their choices and provide non-bias answers to their questions. Should a consumer decide to enroll in Family Care or IRIS, the I&A staff will help the consumer understand the next steps in the process and make a referral to the appropriate MCO or IRIS Consultant Agency.

The ADRC of Rock County will have I&A staff available from 8:00 a.m. to 4:30 p.m. (and by appointment after hours) and will act as an “intake” unit, accepting telephone calls and walk-ins. When a consumer calls the ADRC, the caller will go directly to an I&A staff phone. Should the consumer need to leave a voice-mail message, it is the expectation that all telephone inquires are responded to by the next business day. Consumers who come to the ADRC for I&A will be followed by the same I&A staff who took the initial call or had the first contact. It is

thought that when an I&A staff follows a consumer from intake to resolution, it is a more efficient use of staff time and less confusing for the consumer.

