

**ADRC STEERING COMMITTEE MEETING
WEDNESDAY, NOVEMBER 3, 2010--3:00 P.M.**



**ROCK COUNTY JOB CENTER
1900 CENTER AVENUE
ROOM D/E
JANESVILLE, WI 53546**

AGENDA

1. Call Meeting to Order
2. Approval of Agenda
3. Approval of Minutes of ADRC Steering Committee Meeting October 6, 2010 *
4. Citizen Participation
5. New Business:
 - A. Committee Chair Comments on October 6th Meeting – Terry Thomas
 - B. Presentation of ADRC Information Technology Systems – Joyce Lubben, Diana Arneson
 - Equipment and Installations *
 - Management Information Systems and Reporting *
 - C. Discussion and Approval of ADRC Information Technology Systems
 - D. Presentation of Customer Service – John Hanewall, Jennifer Thompson
 - Complaints/Grievances *
 - Accessibility/Cultural Competency *
 - Customer Service Strategy *
 - E. Discussion and Approval of Customer Service
 - F. Presentation of Access to Services – Steve Hare, Tom Hermans
 - Access to Mental Health/AODA Services *
 - Access to Public Benefits *
 - Access to Emergency Service *
 - Access to Elders/Adults at Risk Services *
 - G. Discussion and Approval of Access to Services
6. Old Business:
 - A. Discussion and Approval of I&A and Transition Sections From October 6th Meeting *
 - B. EBS/DBS Differences *
7. Committee Member Comments
8. Next Meeting: Wednesday, December 1, 2010 at 3:00 p.m. at the Rock County Job Center, Room D/E, Janesville, Wisconsin.
9. Adjourn

*******COMMITTEE MEMBERS*****
PLEASE BRING THIS PACKET
*****TO THE MEETING*******

* Denotes Attachment

In the event a committee member is unable to attend,
please contact Jennifer Thompson (Rock County LTS) at 741-3684.

Equipment and Installations:

The Aging and Disability Resource Center (ADRC) of Rock County shall have its own dedicated phone number or numbers, including a phone number which is toll free to all callers within Rock County. These telephone numbers shall be publicized in the ADRC's marketing materials and published in local telephone books.

The Aging and Disability Resource Center telephone shall be answered as "Aging and Disability Resource Center of Rock County." To respond to phone inquiries, a phone bank of Information and Assistance 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.

The telephone system shall have the capacity to transfer calls internally within the ADRC and to connect callers directly to other county agencies, emergency services and to hard-to-reach organizations without requiring the caller to place a separate call. 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 ADRC will have a well-publicized electronic mail (e-mail) address which can be published on the Department's worldwide website for the public to use. The ADRC shall respond to email contacts in the same manner as any other written request.

The ADRC shall have a website to communicate its services to the client populations and general public. The website shall include descriptions of the ADRC's mission, the populations it serves, the types of information and services it provides, and

contact information (telephone number, address, hours of operation, e-mail address, etc.).

Rock County will use Beacon-web as a means for the public to locate desired resources.

Management Information Systems and Reporting

The Aging and Disability Resource Center of Rock County (ADRC) 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, client-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 Aging and Disability Resource Center 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
(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)

Accessibility and Cultural Competence:

The ADRC of Rock County will comply with the Americans with Disabilities Act (ADA) 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.

Customer Service Strategies:

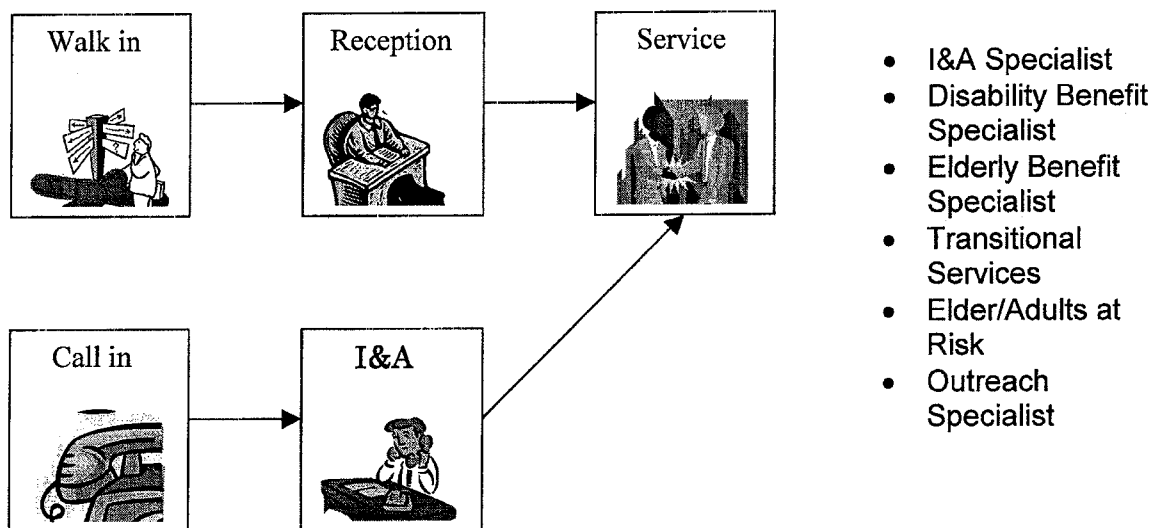
One of the goals of the ADRC of Rock County is to provide staff who are friendly to all who walk through the door, empathetic to their needs and concerns, and knowledgeable of the resources available. The first person a consumer will speak to when they walk through the entrance is a receptionist who 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 is 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 client 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 Managed Care Organization 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 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 information and assistance 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.



Access to Mental Health and Substance Abuse Services

The Aging and Disability Resource Center (ADRC) of Rock County will provide Information and Assistance 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 people 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 and FoodShare and Other Public Programs and Benefits

When an individual contacts the Aging and Disability Resource Center of Rock County (ADRC) 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 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.

Access to Emergency Services

The Aging and Disability Resource Center of Rock County (ADRC) will develop protocols to ensure people are connected promptly with appropriate providers of emergency services during and after business hours. ADRC staff will receive training to effectively recognize calls 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 memorandum of understanding (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 will have an MOU with the managed care organization(s) regarding the handling of emergency calls concerning their members.

An ADRC staff member will handle 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 Aging and Disability Resource Center of Rock County (ADRC) 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 caller and connect the caller 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 call 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 Memorandum of Understanding (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 client is a member of the MCO. The MOU will detail respective responsibilities in these situations.

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 managed care organization(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.

Information & Assistance

Information and Assistance (I&A) services will be provided via phone, mail, e-mail, and in-person. The Aging and Disability Center (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. 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. ~~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.

DBS and EBS – Legal Service Models

Disability Benefit Specialist

- Not legal service
- Primary activity: SSA Disability Determination Process
- Supervisors are local; attorney's provide input
- Attorney's provide technical assistance and ongoing training
- Basic training is received through the Wisconsin Disability Benefits Network

Elderly Benefit Specialist

- Legal service
- Primary activity: Medicare
- Attorney's are supervisors
- Attorney's provide technical assistance and, basic and ongoing training