

Information and Assistance

ADRC Operations Manual

I. Introduction

The ADRC provides information and assistance to older adults, people with physical and intellectual disabilities, and their families, friends, caregivers, and others who ask for assistance on their behalf. Providing information and assistance includes listening to and supporting the customer, assessing their needs and personal preferences, identifying the most appropriate resource(s) to meet their needs, helping them to connect with service provider(s), and providing information to meet their needs using a person-centered approach. Information and assistance must be provided in a manner convenient to the customer including, but not limited to, in-person at the person's home or at the ADRC as an appointment or walk-in, over the telephone, virtually, via email, or through written correspondence.

II. Requirements for Performing Information and Assistance

A. Process for Providing Information and Assistance

1. Answer the phone by stating "Aging and Disability Resource Center of ..." and identifying yourself to the customer.
2. Respond to requests for information and assistance within one business day. If necessary, your initial response may be to acknowledge the request and schedule an appointment with the customer.
3. Evaluate the call or request by:
 - Establishing rapport with the customer.
 - Support and encourage the customer.
 - Identifying the issue(s) that led to the inquiry.
 - Determining the nature of the situation.

- Evaluating the knowledge, capacity and personal preferences of the customer in order to determine how to best provide assistance.
- Identify the most appropriate resource(s) to meet the customer’s need(s).
- Evaluating the need for other ADRC services such as options counseling, benefits counseling, and dementia related services. Criteria used to evaluate the need for options counseling are:
 - Limited ability to communicate
 - Limited ability to advocate for self
 - Limited support system
 - Limited capacity to act on information provided
 - New or advancing health condition that is impacting the customer
 - Life altering event or situation that is impacting the customer
 - Significant change in circumstances that is adversely impacting the customer
 - Limited financial resources to fund needed services

Note: If one or more of these criteria exist, the ADRC Specialist should offer options counseling to the customer. When offering options counseling, the ADRC Specialist should phrase the offer for options counseling as meeting with the customer to learn more information about their situation so they can provide more in-depth assistance. The exact phrase of “options counseling” should not be used because this is professional jargon that the general public is unlikely to understand.

4. Provide the customer with information that is:
 - Accurate and useful.
 - Relevant to the customer's expressed need and personal preferences.
 - In the language and formats that are easiest for the customer to understand.
 - Objective and does not appear to favor or attempt to persuade the customer to choose any particular setting, program, service, or provider.
5. Provide referrals or assistance in accessing public and private resources. The information that you gathered while evaluating the call or request should be used to determine what referrals and assistance you provide to the customer.

6. Follow up with customers to whom you have provided information and assistance to determine whether their needs were met and whether they need additional information and assistance. Provide follow-up in a manner that is consistent with the required [Follow-Up Policy](#) (P-02923-07).
7. Advocate on the behalf of customers who have issues with access to services.

B. Recognizing and Responding to Emergencies

ADRCs must be prepared to recognize and effectively manage emergency situations. Train staff to identify an emergency and apply emergency procedures to handle the situation. Train staff to:

- Remain calm.
- Attempt to de-escalate the situation.
- Identify emergency-related symptoms such as a heart attack, stroke, suicidal ideation, or domestic violence.
- Collect needed information.
- Connect the customer with local emergency service providers.
- Follow up as needed.

ADRCs are expected to recognize and respond to emergencies; however, they are not expected or considered to be emergency service providers. During business hours, ADRC staff will follow protocols and processes established by local emergency resources, such as 9-1-1 services or crisis intervention services, in order to assure that people are promptly connected with the appropriate emergency service provider when an immediate risk has been identified.

C. Youth in Transition

Upon request, the ADRC must provide youth and their families with information about the resources available when they reach adulthood, help them think through the available options, and assist in accessing programs and services, as appropriate. ADRC staff who provide information and assistance need to be familiar with any resources specific to youth in transition.

ADRC services are available to youth who are age 17 years and 6 months or older and their families. If the ADRC receives requests for information for youth that are under the age of 17 years and 6 months, the ADRC should refer families to the Children’s Waiver Agency. The ADRC may, at its discretion, make an exception in special cases where the complexity of the customer’s needs require additional time for [options counseling](#) (P-03062-02).

D. Client Tracking

CLIENT TRACKING EXAMPLE			
Encounter	ADRC Outcome	Call Topic(s)	Example of Note
<p>1. The customer contacts the ADRC.</p> <p>2. The ADRC specialist identifies customer's inquiry, situation, capacity and personal preferences.</p> <p>3. The ADRC specialist identifies the most appropriate resources that meets the customer’s needs.</p> <p>4. The ADRC specialist provides resource information specific to the customer’s inquiry and situation. Information</p>	<p>Provided Information and Assistance</p>	<p>Adaptive Equipment</p> <p>Home Services</p> <p>Food</p>	<p>ADRC received call from customer. He explained he is scheduled to have hip surgery next month. Customer is seeking information about how and where to get a walker so he can be prepared to come home after hip surgery. Customer explained that he does not have family members that are able to assist him. ADRC Specialist shared resources for walkers and discussed other possible needs he may have post-surgery, including in-home services, personal care services, and home delivered meals. ADRC Specialist will send email to customer with links to resources. The ADRC Specialist offered to contact the customer next week. Customer agreed to follow up call.</p>

<p>shared should be person-centered.</p> <p>5. The ADRC specialist offers to follow up with the customer.</p>			
<p>6. The ADRC Specialist contacts customer to provide a follow-up contact.</p>	<p>Provided Follow-up</p>	<p>Adaptive Equipment</p> <p>Home Services</p> <p>Food</p>	<p>ADRC Specialist called customer to receive an update about his connecting with resources. Customer picked up a walker today. He also contacted the local hospital and scheduled home delivered meals to start when he returns home. Additionally, he made arrangements with ABC Support Agency to set-up cleaning and grocery shopping services for him during his rehab. Customer worked out an arrangement with a friend who will help him get in and out of the shower 2x/week until he feels stable enough to do this on his own. ADRC Specialist asked if he has other concerns or questions and he did not. ADRC Specialist reminded him to contact the ADRC if he needs further assistance in the future.</p>

III. Collaborating with other Aging and Disability Programs

Information and assistance is a function of both the aging unit and the ADRC. It is critical that the aging unit and the ADRC collaborate to provide this service to community members. Staff providing information and assistance must be knowledgeable about all ADRC and aging programs, including local policies and procedures such as referrals to these programs. Therefore, all staff providing information and assistance are strongly encouraged to familiarize themselves with all of the program sections in this operations manual. In many ADRCs, staff providing information and assistance also provide other ADRC services such as options counseling.

IV. Operational Policies and Procedures

A. Statutory References

Information and assistance is a requirement of ADRCs under Wisconsin statute. It is also a requirement under the federal Older Americans Act.

[Wisconsin Statute § 46.283](#)

[Wisconsin Statute § 46.82](#)

[Wisconsin Administrative Code Ch. DHS 10.23](#)

[Older Americans Act of 1965 – 2020 Reauthorization](#)

B. Agency Requirements

The ADRC will have at least one full-time ADRC specialist position, wholly within the ADRC, that provides information and assistance as its primary job responsibility. This position may also provide options counseling, eligibility, and enrollment functions.

Employees of the ADRC and any of its subcontractors who provide information and assistance, options counseling, benefits counseling, long-term care functional screening, enrollment counseling, or other professional responsibilities will have a Bachelor of Arts or Science degree or a license to practice as a registered nurse in Wisconsin. In addition, they must have the equivalent of at least one year of full-time experience in a health or human services field, working with one or more of the client populations served by the ADRC. Qualifying work experience may be paid or unpaid and may include internships, field placements, and volunteer work.

The ADRC must obtain approval from DHS or a request for [Waiver of Education or Experience Requirements \(F-00054\)](#) prior to making a job offer to a candidate that lacks the degree or experience described above.

Staff providing information and assistance must also meet the minimum FTE requirement of .5 FTE. All part-time staff providing information and assistance must do so at least half time or a waiver of the requirement needs to be requested. ADRCs can request to waive the .5 FTE requirement by completing and submitting form [F-0054D](#).

Staff providing information and assistance must have private office space or access to private meeting space where they can have confidential conversations. Customers and families will not experience a delay in meeting with ADRC specialists because of a lack of private space.

C. Supervision

ADRC specialists providing information and assistance may be directly supervised by the ADRC director or another supervisory position within the ADRC. Supervisors are expected to maintain expertise in the requirements for information and assistance as well as best practice approaches in order to support agency staff.

Supervisors of staff who provide information and assistance are encouraged to observe staff providing information and assistance. Providing feedback to staff providing information and assistance is a great way to help them fine tune their skills and grow in their abilities. Supervisors may use the [Information and Assistance Supervisor Observation and Support Tool \(F-02860\)](#) and the [Information and Assistance Supervisor Observation and Support Tool Guide \(P-03076\)](#).

D. Allowable Funding Source(s)



[ADRC grant](#)

III-B*

E. Policy Requirements

[Follow-Up \(P-02923-07\)](#)

[Conflict of Interest \(P-02923-03\)](#)

[Confidentiality \(P-02923-06\)](#)

[Complaint and Grievance Regarding ADRC Services \(P-02923-02\)](#)

F. Training and Certification Requirements

ADRC staff answering the phone and all other ADRC staff who interact with the public must have thorough knowledge of the mission, operations, and referral and confidentiality policies of the ADRC. They must also have general knowledge of the ADRC's customer populations; expertise in phone etiquette; excellent communication skills; excellent listening skills; knowledge and ability to connect customers to appropriate ADRC staff; the ability to recognize and appropriately respond to people with special hearing, language, or cognitive needs; and the ability to recognize and appropriately respond to emergencies.

At least one ADRC specialist providing information and assistance at the ADRC will be certified by the [Alliance of Information and Referral Systems \(AIRS\)](#) as a Certified Information and Referral Specialist (CIRS) or Certified Information and Referrals Specialist - Aging/Disability (CIRS-A/D). Time-limited extensions may be requested, subject to DHS approval, for individuals who lack a bachelor's degree and must work longer to be eligible to take the AIRS exam or who fail the certification examination and are scheduled to retake the test.

Staff providing information and assistance are encouraged to complete the following modules in the [Learning Management System](#):

- ADRC Orientation
- ADRC Specialists Initial Training
- Options Counseling Standards (Module 1: Options Counseling Overview)

ADRC specialists are strongly encouraged to participate in other DHS training opportunities, including professional conferences. This includes, but is not limited to, the Aging and Disability Network conference, the National AIRS conference, and the Wisconsin AIRS conference. A current schedule of trainings can be found on the [ADRC Calendar of Events](#).

G. Reporting Requirements

ADRC specialists must document their interactions with individual customers, including the nature of the inquiry, information discussed, resources shared, decisions made, and next steps. Documentation will include the required elements described in the [Client Tracking \(P-03062-09\)](#) section of this manual.

ADRC specialists that provide information and assistance as one of their main job responsibilities are required to complete 100% Time and Task Reporting for Medicaid Administrative claiming. Detailed information on [100% Time and Task Reporting \(P-03062-10\)](#) can be found within that section of this manual.

V. Additional Resources and Tools

[Alliance for Information and Referrals Specialists](#) (AIRS)

[Youth Transition Pre-Test](#) (F-00676)

[Youth Transition Post-Test](#) (F-00676A)

[County Communities on Transition](#)

[Wisconsin County Community on Transition Toolkit](#)