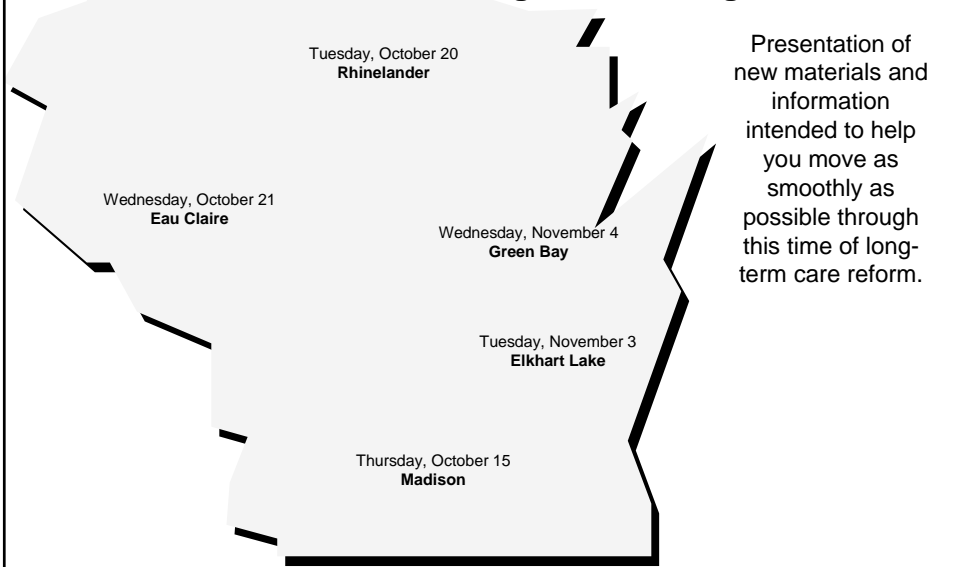


2009 Elder Adults/Adults-at-Risk and Adult Protective Services Regional Training Sessions



Presentation of new materials and information intended to help you move as smoothly as possible through this time of long-term care reform.

2009 Elder Adults/Adults-at-Risk and Adult Protective Services Regional Training Sessions

Resources Available on the state web site <http://dhs.wisconsin.gov/aps/>

- How to prevent financial exploitation.
- Chapter 55 Manual
- SafetyNetWorks and Numbered Memos
- WITS Information
- Publications and Brochures
- Frequently Asked Questions



- County Staff and Other Professionals
- FAQs
- Training
- Publications
- Additional Resources
- Elder Abuse
- County/Tribal Help Lines
- Contact Us

To report abuse of an elder
(age 60 plus),
call your county helpline

To report abuse of an Adult-at-Risk
(age 18 to 59),
call your county helpline

To report abuse outside of Wisconsin, contact [NAPSA](#)

To report abuse in a [nursing home](#) or other long term care facility



Protect yourself from financial exploitation, unscrupulous telemarketers, identity theft, and scams.

What do I do if I suspect someone is being abused or neglected?

If you suspect an elder adult or adult at risk ([Definitions](#)) has experienced, is currently experiencing, or is at risk of experiencing abuse, neglect, self-neglect, or financial exploitation:

State APS Web Site: <http://dhs.wisconsin.gov/aps/>



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Protect yourself from financial exploitation, unscrupulous telemarketers, identity theft, and scams.

All external hyperlinks are provided for your information and for the benefit of the general public. The Department of Health Services does not testify to, sponsor, or endorse the accuracy of the information provided on externally linked pages.

Financial Exploitation

Telemarketing

Identity Theft

Scams

Other Helpful Links

 [Printer Friendly Version of this Information](#) 

Financial exploitation can rob a person of self-esteem and trust, as well as stealing needed income and assets. Although financial exploitation does not leave physical scars, it is an abusive crime.



- County Staff and Other Professionals
- FAQs
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Chapter 55 Manual

Policies & Procedures

WITS

Wisconsin Elder Adults/ Adults-at-Risk and Adult Protective Services Response Systems

What's New:

[How to protect yourself from financial exploitation, telemarketers, identity theft and scams.](#) This new web page may be helpful as a handout when you are working with clients and financial institutions. There is also a [printable version](#) for those who do not have internet access.

[Regional Training Online Registration](#)

APS Professionals:
<http://dhs.wisconsin.gov/aps/pros/index.htm>



- County Staff and Other Professionals
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Chapter 55 Manual

Policies & Procedures

WITS

Wisconsin Elder Adults/ Adults-at-Risk and Adult Protective Services Response Systems

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Publications

[SafetyNetWorks](#) | [Numbered Memos](#)

[Administrative Code Revisions](#)

[2008 Annual Reports](#)

[Prior Year Reports](#)

[Brochures and other Public Awareness Materials](#)



- County Staff and Other Professionals
- FAQs
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Adults at Risk Frequently Asked Questions

You can use this feature to find information on topics related to Adults at Risk and Elder Adults at Risk, Protective Placement and Services, and Guardianship. Select one of the letters below to view topics starting with that letter.

You can get **back to the top** by clicking on the letter in the shaded area. From the answers page, you can get back to this FAQ Index page by clicking on any of the topics in the shaded area.

[A](#) | [B](#) | [C](#) | [D](#) | [E](#) | [F](#) | [G](#) | [H](#) | [I](#) | [J](#) | [K](#) | [L](#) | [M](#) | [N](#) | [O](#) | [P](#) | [Q](#) | [R](#) | [S](#) | [T](#) | [U](#) | [V](#) | [W](#) | [X](#) | [Y](#) | [Z](#)

A
[Advance Directives Information](#)

B
[Benefit Specialist Reporting](#)



Frequently Asked Questions Index as of October 1

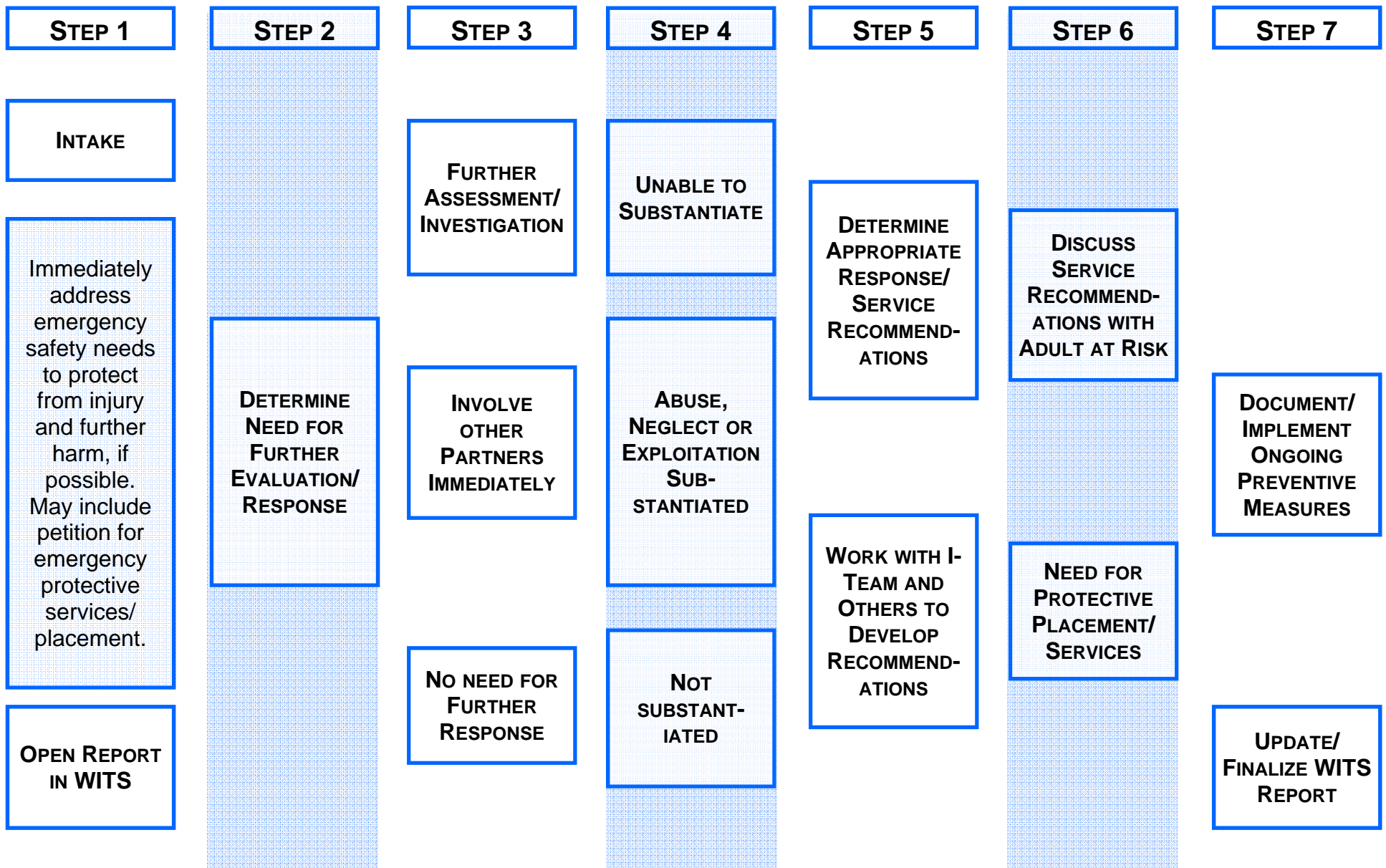
- Advance Directives Information
- Benefit Specialist Reporting
- Confidentiality
- Corporate Guardians
- County Conflict of Interest
- County Government as Elder Adults/Adults-at-Risk Agencies
- Disability Benefit Specialist Reporting
- Durable Medical Equipment
- Durable Power of Attorney Information
- Elder Abuse Funds for Durable Medical Equipment
- Elderly Benefit Specialist Reporting
- Financial Exploitation of Younger Adults at Risk (age 18 to 59)
- Financial Exploitation Records Requests
- Flow Chart
- Graham Leach Bliley Act Exceptions
- Guardianships Determined Before Law Changes
- Involuntary Admission to a Facility
- Information Release to an Alleged Abuser
- Limited Required Reporters
- Limit on Number of Wards
- Living Will Information
- Mandatory Reporters (Limited Required Reporters)
- Notice of Transfer of Protective Placement
- Photographic Evidence
- Power of Attorney Information
- Power of Attorney for Health Care Witnesses
- APS Process Flow Chart
- Protective Placement, Notice of Transfer
- Public Sector as Elder Adults/Adults-at-Risk Agencies
- Referral to Elder Abuse/Adults-at-Risk Agency or Adult Protective Services
- Release of Information to an Alleged Abuser
- Reporting of Abuse by Benefit Specialists
- Reporting Triggers/Red Flags
- Required Reporters, Limited
- Restraint
- Wards, Limits on Number of Wards
- Witness, Power of Attorney for Health Care
- Younger Adults at Risk Financial Exploitation Response

Additional Resources Now Available on the state web site

2009 Elder Adults/Adults-at-Risk and Adult Protective Services Regional Training Sessions

- Rule Amendment/Memo – Disability Benefit Specialist Reporting
- SafetyNetWorks – Referral Guide
- SafetyNetWorks – EA/AAR/APS Process Flow Chart
- SafetyNetWorks – Responding to Reports of Restraint or Confinement
- SafetyNetWorks – Maintaining EA/AAR/APS in the Public Sector
- SafetyNetWorks – The Social Work Philosophy of EA/AAR/APS
- SafetyNetWorks – Financial Exploitation Information
- SafetyNetWorks – Release of Confidential Treatment Information
- SafetyNetWorks/Memo – Limited Required Reporter/Reporting Requirements
- SafetyNetWorks – Using Photography
- SafetyNetWorks – Information about Annual (Watts) Review)
- Numbered Memo – Family Care APS Funding
- Numbered Memo – County Conflict of Interest Process Information
- Numbered Memo – Protective Placement Requirements
- Numbered Memo – Responding to Reports of Abuse, Neglect or Exploitation
- Numbered Memo – Administration of Psychotropic Medication
- Numbered Memo – Residency Determination

Elder Adults/Adults at Risk/Adult Protective Services Agency Report Flow Chart



This chart is not a map providing a direct route from point A to point B. Instead, it is intended to provide elder adults/adults at risk workers with a graphic guide of areas to be considered in response to each report of abuse. In some cases, steps may be skipped. For example, the need for protective services/placement may be evident immediately so the process would jump from Step 1 to 6.

Referral Guide

In the past, an individual would come to the attention of the county human services or aging department and it was likely that the person responding to concerns about abuse was at the next desk, or in some cases was the same person. In the future, Aging and Disability Resource Center (ADRC) and Managed Care Organization (MCO) staff will likely identify a growing number of abuse, neglect and financial exploitation cases. Some of these staff, who work outside of the county system, may need more training and information about:

- who is an adult at risk,
- what constitutes abuse, neglect and financial exploitation,
- when they should report to the EA/AAR/APS agency, and
- where to refer concerns about abuse.

Appendices included:

- Common Characteristics to Assist in Knowing When to Refer to EA/AAR/APS
- Key Definitions Relating to Adults at Risk
- Questions to Ask if You Suspect Abuse, Neglect or Financial Exploitation
- Examples: Here is the Situation. Should a Referral be Made?

Helpful Resources (continued)

Sample MOUs and other helpful templates.

- MCO
- ADRC
- Law Enforcement
- Financial Institutions
- County Conflict
- Photography
- Reporter Response Letter
- Involuntary Administration of Psych Drugs Form
- Sample Intake Form
- Chapter 55 Facilities (Coming Soon)
- Guardianship Fee Policy (Coming Soon)

SAFETYNETWORKS
Information for Elder Adults-at-Risk and Adults-at-Risk Agencies
AAR Information Memo # 11, October 2009

IN THIS ISSUE: MEMORANDA OF UNDERSTANDING SAMPLES AND TEMPLATES FOR USE BY COUNTY ELDER ADULTS/ADULTS-AT-RISK AGENCIES AND ADULT PROTECTIVE SERVICES UNITS

SUMMARY

Attached are several documents that will be helpful to Elder Adults/Adults-at-Risk/Adult Protective Services (EA/AAR/APS) agencies in developing required memorandums of understanding (MOUs) and related materials.

Templates and MOU Samples include (to move to any of these documents, click on the underlined subject or go to the page listed):

MCO MOU.....Page 3

1. Template of the MOU between EA/AAR/APS and the local Family Care managed care organization (MCO). This MOU is required as part of the MCO contract with the state.

ADRC MOU.....Page 6

2. Template of the MOU between EA/AAR/APS and the Aging and Disability Resource Center (ADRC) in the county. This MOU is required in the ADRC contract with the state.

Law Enforcement MOUPage 12

3. Template of the MOU between EA/AAR and local law enforcement. This MOU is required under Wisconsin Statutes 55.043(1g)(a) and 46.90(3).

Financial Institutions MOUPage 23

4. Template of an MOU between EA/AAR and local financial institutions. This MOU is not required but may be needed to get quick access to financial records of adults at risk. Wisconsin law allows an EA/AAR agency to review any financial records of an elder adult/adult at risk. (Wis. Stats. 46.90(5)(2b)(b) and 55.043(1r)(6))

County Conflict of Interest MOUPage 37

5. Template of a county to county MOU for transfer of cases when the responsible county has a conflict of interest. This MOU is not required but it is helpful to develop a relationship with another county for when these conflicts arise.

Conflict Transfer Authorization Form.....Page 42

6. State Transfer Authorization. When a county has a conflict of interest in responding to a report of abuse, neglect or financial exploitation, the EA/AAR agency must send a form to the state authorizing the transfer. (See #5 above)

Templates and MOU Samples List (continued):

Reporter Response LetterPage 43

7. Sample of a Response Letter to a person who reported abuse, neglect or financial exploitation. This letter lists the statutes that limit information released to protect the privacy of the elder adult/adult at risk.

Photo Authorization and Documentation FormPage 44

8. Photo Authorization Form. When using photos as evidence, per Wis. Stat. 55.043(1r), it is recommended that you get the individual's approval. If s/he objects, the refusal should be respected.

Involuntary Administration of Psychotropic Drugs Form.....Page 46

9. Form for Involuntary Administration of Psychotropic Drugs. For more information, see DQA Numbered Memo 07-012
http://dhs.wisconsin.gov/rl_dsl/Publications/07-012.htm

Intake FormPage 49

10. Intake Form. Many of you have been looking for a sample intake form. This document also contains a simplified, one-page template. For a more complete template that includes ALL the information needed to the Wisconsin Incident Tracking System (WITS report, see
<http://dhs.wisconsin.gov/forms1/f2/f20441a.pdf>.

Emergency Protective Placement Facility TemplateComing Soon

11. Wisconsin Statutes 55.02(2) b. 4. requires counties to designate an Emergency Protective Placement Facility.

Guardianship Fee Policy TemplateComing Soon

12. Guardianship Fee Policy Template

These templates are intended to assist counties in defining roles and processes. Each county will need to modify the template to fit its specific operations.

This is not a complete list. We will be adding information as it is developed. If you have ideas about templates needed, please contact us. Or, if you have a sample form or document that you think would be helpful, please e-mail it to us.

QUESTIONS OR TO RECOMMEND ADDITIONAL TEMPLATES OR SAMPLES

Contact us at:

Kay Lund at 608-261-5990 or
Kay.lund@wisconsin.gov

Jane Raymond at 608-266-2568 or
Jane.Raymond@wisconsin.gov

Bureau of Aging and Disability Resources -- Division of Long Term Care
PO Box 7851 -- 1 West Wilson Street, Room 450 -- Madison, WI 53702