



*Aging & Disability Resource Centers of Wisconsin*

# **ORIENTATION MANUAL**

**Information & Assistance  
and Options Counseling**



# ADRC Orientation Manual

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## Aging & Disability Resource Center

*A grant from the Administration for Community Living (ACL), formerly the Administration on Aging, supported the development of this manual.*



## I Introduction

### About this Manual

The purpose of this manual is to provide an orientation for Aging and Disability Resource Center staff who provide Information and Assistance, Options Counseling, and Enrollment and Disenrollment services. This manual serves as an orientation guide for new staff as they begin their career, and as a helpful reference tool for current staff.

This manual is not intended to replace new employee orientation efforts already in place at each ADRC. Rather, this manual provides a reference tool to use as a supplement to existing practices. Overall, it is intended to support consistent customer-oriented service delivery. Many of the sections within this manual contain links to state and national reference materials. It is updated periodically as changes, innovations, and new best practices occur.



### ADRC History

Wisconsin is the birthplace of Aging and Disability Resource Centers (ADRCs) which were first established as pilot programs in 1998 as part of long-term care reform. Since that time, the State's Department of Health Services (DHS) has expanded the development of ADRCs throughout Wisconsin. Currently, residents in every county have access to ADRC programs and services. The Federal Administration for Community Living has promoted the development and implementation of ADRCs nationally.

In Wisconsin, ADRCs serve adults with disabilities, older adults, caregivers and their families, and the community-at-large. According to data derived from ADRC Activity Reports, a person contacts an ADRC in the state of Wisconsin every 20 seconds of a business day.



## **Mission**

The mission of the ADRCs is to empower and support seniors, and people with disabilities and their families, by providing useful information and finding the help people seek.

## **Purpose**

Aging and Disability Resource Centers are a central source of information, assistance, and access to community resources for older people, and people with disabilities, as well as their families. Personalized assistance is available at the resource center, over the telephone, or in visits to an individual's home.

## **Our Customers**

Individualized services are available to older people or persons who have a physical or developmental disability. People with a mental illness or a substance use disorder may receive information and referral and benefits counseling from the Aging and Disability Resource Center or be connected to assistance through other resources. Aging and Disability Resource Centers are also available to help families and friends, caregivers, physicians, hospital discharge planners, and other professionals who work with older people and people with disabilities.

## **What We Do**

- Provide a welcoming, attractive, and accessible place where older people and people with disabilities can go for any information, advice, and help in accessing services.
- Provide one central source of reliable and objective information about a broad range of community resources of interest to older people and people with disabilities.
- Help people to understand the various long-term care options available to them.
- Enable people to make informed, cost-effective decisions about long-term care.
- Help people conserve their personal resources, health, and independence.
- Serve as the single access point for publicly funded long-term care.
- Reduce the demand for public funding for long-term care by delaying or preventing the need for potentially expensive services and supports.
- Help people to apply for eligibility for programs and benefits, and use their communities' resources.



## Professional Standards & Credentials

The majority of ADRC staff who provide Options Counseling also provide Information and Assistance services and Enrollment and Disenrollment services. Two primary sources of standards impact ADRC practice: Information and Referral Standards and Options Counseling Standards. The Information and Referral Standards are overseen by the Alliance of Information and Referral Systems (AIRS), first incorporated as an organization in 1973. Wisconsin developed draft Options Counseling Standards in 2010-12 as part of a grant from the Federal Administration for Community Living. The standards help define the scope of practice for ADRC professionals.

AIRS provides for credentialing of individuals who practice in the broader field of Information and Referral. Available certifications include: Certified Resource Specialists, Certified Information and Referral Specialists, and Information and Referral Specialists-Aging. Certification for Options Counseling is currently under development by the Federal Administration for Community Living.



## ADRC Philosophy of Service

*Information and Assistance Specialists provide the client with knowledge about services, programs, and solutions for disability and long-term care issues.*

The philosophy of the ADRC is focused on person-centered practice whereby staff show respect for the uniqueness of each individual. In the provision of services, respect for the dignity and worth of the individual is evident.

A customer's right to self-determination is inherent in the philosophy of ADRC practice. Key elements include the use of people-first language, a non-judgmental approach, and respect for customer confidentiality.





## Service Definitions

### **Information & Assistance (I & A):**

Involves listening to the inquirer, assessing his or her needs, helping the inquirer to connect with resources or service providers or gain information to meet the identified needs (e.g., provide assistance locating transportation services, chore services, employment and training options; provide linkages to elder abuse and adults at risk system; refer for benefits counseling).

### **Options Counseling:**

A person-centered, decision support service that empowers older adults, adults with disabilities and their families/caregivers to make informed decisions about current or future long-term care choices.

### **Enrollment Activity:**

Involves assisting an individual who is found eligible for publicly funded long-term care in selecting and enrolling in a publicly funded long-term care program (e.g., Family Care, Partnership, PACE, IRIS).

### **Disenrollment Activity:**

Includes assisting an individual by providing information and counseling about the implications and consequences of disenrolling from a publicly funded long-term care program (e.g., Family Care, Partnership, PACE, IRIS).



## Connections between Information & Assistance (I & A) and Options Counseling

Options Counseling is an extension of I & A. Many times, ADRC customers approach the ADRC not knowing what to expect. Customer expectations are often clarified when staff share their role and the role of the ADRC in the beginning of the conversation. The initial customer interaction in both I & A and Options Counseling begins with welcoming and engaging the customer, and identifying the issue that brought them to the ADRC. An exploration of community resources takes place in both discussions.

Options Counseling, unlike I & A, goes beyond educating customers about community services and supports. Options Counseling emerges, and becomes different from I & A, when decision-support takes place. Information is tailored to each customer based on their values and preferences, and then staff elicit the customer's views on each of the options. This part of the conversation is a marker for decision-support. It is important to note that some individuals desire assistance to sort through the advantages and disadvantages of service options and narrow their options via decision-support. Others choose to forgo these conversations with ADRC staff and choose to make decisions independently. A variety of circumstances may cause Options Counseling to be especially beneficial. Some of these include life changes such as:

- transitioning from school-based system to programs for adults with disabilities;
- after experiencing traumatic events – e.g., car accident, stroke;
- when considering a move.

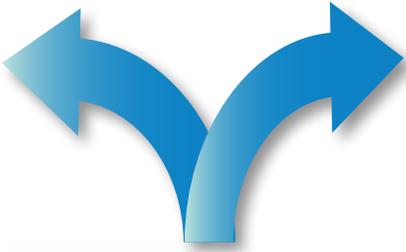
### Service Delivery

Options Counseling is a cornerstone service of ADRCs and is an extension of Information and Assistance. The components of Options Counseling are embedded in the Options Counseling Standards and provide the basis for information contained in this section of the manual. Basic components of Options Counseling practice are described below. *Please refer to the Options Counseling Standards and training modules for more detailed information.*

#### A. Welcome

As a professional at the ADRC, staff provide the first impression that customers experience. Therefore, it is important to provide a welcoming reception, whether this takes place over the phone, in person, via email, or in another venue. Privacy and confidentiality are interconnected. Customers tell us that their views of interaction with ADRC staff are impacted by the privacy they are afforded during their contacts. Ways to ensure privacy include meeting in designated interview/conference rooms, or individual offices. Customers should be assured that the information is kept confidential; this is reinforced by providing privacy for customer interactions.





*Options Counseling goes beyond educating customers about community services and supports. Options Counseling emerges and becomes different from I & A, when decision-support takes place.*

### ***B. Discovery***

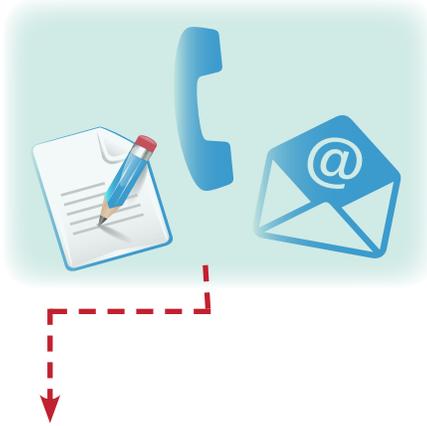
Discovery includes many things. It begins with learning why the individual reached out to the ADRC; identifying the customer's concerns and needs; and exploring what is or isn't working with that person. Discovery includes identifying the individual's strengths, values, and preferences, and the results they would like to see happen after their contact with the ADRC. Discovery also includes identifying where the customer is in the decision-making process.

### ***C. Resource Options and Decision Support***

Once a clear picture of the person's situation has been obtained, and an understanding of what is important to them is ascertained, staff assist the customer by researching the database and supplemental documents to identify resources that help meet the customer-identified needs. These options are presented in a facilitated discussion that elicits customer-identified benefits of each option and concerns the customer may have. The primary goal of the decision-support process is to help the customer narrow the array of options so that choices made reflect those that best fit the customer's needs. Therefore, it is essential that staff remain unbiased in their approach to these options and ensure that decisions made are congruent with what the customer needs and wants. If a conflict of interest emerges in this discussion of resource options, then staff should take appropriate action to address these concerns.

### ***D. Action Plan***

The Action Plan helps the customer move from identifying resource needs to specifying next steps. These next steps are predicated on the priority of the person, their desire to proceed, and the availability of services. During this conversation, it is important to discuss relevant informal supports and other available low-cost options. Customers should be assured that services identified in the Action Plan is not "set in stone" and that services can be considered on a trial basis. A written action plan can be offered to the customer as part of this step in the Options Counseling process.



*Customers are more likely to recommend ADRCs to others when follow-up has occurred.*

### **E. Follow-up**

As outlined in the Options Counseling Standards, follow-up provides an opportunity to learn about the customer’s current situation and the outcome of previous conversations including whether changes or steps in the action plan occurred. Research conducted by Dr. Amy Flowers illustrates the importance of follow-up in customer satisfaction, and that customers are more likely to recommend ADRCs to others when follow-up occurred.

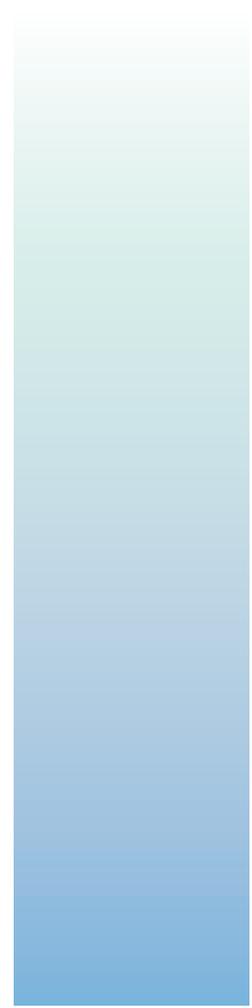
Each ADRC has a policy that guides staff on when to follow-up with customers. Reminders in “tickler” files, or identifying specific follow-up activities at the end of a customer conversation are ways to prompt staff to ensure that follow-up occurs.

### **F. Enrollment Activity**

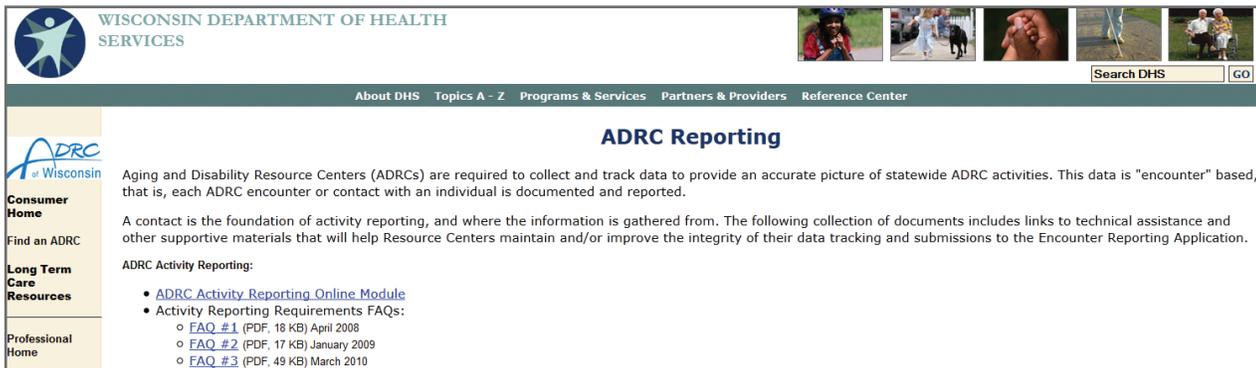
Enrollment Activity is a subset of Options Counseling that focuses on customers who are eligible for publicly funded long-term care services. Customers learn about available programs in their area during Enrollment Counseling. This service is provided in an unbiased, objective, and professional manner. There are a variety of technical assistance materials available to educate customers about these programs. Standardized documents are available from the Office for Resource Center Development.

### **G. Disenrollment Activity**

Individuals who enroll in a publicly-funded long-term care program can choose to disenroll and consider other options. The role of the ADRC is to help people think through the pros and cons of this decision, explore the reasons why they wish to disenroll, and determine if further advocacy is necessary. Re-initiating the Options Counseling process identified earlier can be helpful in facilitating this discussion.



## IV Reporting and Staff Resources



The screenshot shows the Wisconsin Department of Health Services website. The header includes the department logo and name, a search bar, and navigation links: About DHS, Topics A - Z, Programs & Services, Partners & Providers, and Reference Center. The main content area is titled "ADRC Reporting" and contains the following text:

ADRC Reporting

Aging and Disability Resource Centers (ADRCs) are required to collect and track data to provide an accurate picture of statewide ADRC activities. This data is "encounter" based, that is, each ADRC encounter or contact with an individual is documented and reported.

A contact is the foundation of activity reporting, and where the information is gathered from. The following collection of documents includes links to technical assistance and other supportive materials that will help Resource Centers maintain and/or improve the integrity of their data tracking and submissions to the Encounter Reporting Application.

ADRC Activity Reporting:

- [ADRC Activity Reporting Online Module](#)
- Activity Reporting Requirements FAQs:
  - [FAQ #1](#) (PDF, 18 KB) April 2008
  - [FAQ #2](#) (PDF, 17 KB) January 2009
  - [FAQ #3](#) (PDF, 49 KB) March 2010

### Reporting Requirements

Per DHS contract, each ADRC is required to provide documentation to the DHS in a variety of areas. ADRC staff document their activity related to Medicaid (MA) recipients and programs via 100% MA time reporting. Each ADRC documents customer interactions and assign specific activities to each interaction. These activities are compiled by the ADRC and submitted quarterly to the state via the Encounter website. Additional assistance on each of these reporting requirements is available through the Office for Resource Center Development and may include reference materials describing each ADRC activity, customer groups, caller types, and other factors.

### Documentation

Part of professional practice includes documenting interactions that occurred between customers and ADRC staff. Documenting the initial customer experience generally follows a framework which mirrors the major components of the Service Delivery Standards. This framework includes: Welcome, Discovery, Resource Options, and Decision Support. Documentation provides evidence that any of the following - Information and Assistance, Options Counseling, and Enrollment/Disenrollment – have occurred. A Documentation Checklist has been developed to support staff to assess the completeness of their notes and congruence with the standards. A Documentation Training Module is available on the Office for Resource Center Development website.

### Information Technology

As ADRC professionals, you interact with a variety of information technology (IT) systems. These include two main components. The first is the Information and Assistance Resource Database which contains information on services and programs in the ADRC service area. This database is updated at least annually. New agencies and service providers are added according to the ADRC inclusion/exclusion criteria. A state model is available via the Office for Resource Development Center website. Part of the new staff member training will be learning how to effectively search for services and gather helpful information to use during the Resource Options and Decision Support phase outlined in this training.



The second component is the client-tracking area for documentation of customer interaction. Once documentation of the customer interaction has occurred, ADRC staff will assign ADRC activities based on this interaction.

## Tools and Other References

A variety of tools to assist staff in performing their roles are available.

These include:



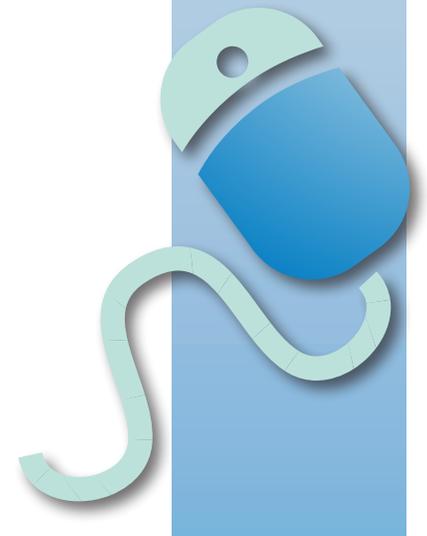
A complete list of Options Counseling training modules for ADRC staff is available via the Office for Resource Center Development website.

## V Summary

In conclusion, Aging and Disability Resource Centers continue to grow and develop in Wisconsin and across the nation. This manual is designed to provide a foundation for new staff as they embark upon ADRC customer service delivery. Information and Assistance and Options Counseling are cornerstone services of the ADRC. Additional training resources are available and include online modules and reference materials. These resources are dynamic and will continue to grow to support dedicated ADRC professionals. The list below provides links to some of these resources.

## Resources

1. Office for Resource Center Development
2. Training Modules
3. Alliance of Information and Referral Systems (AIRS)
4. Administration for Community Living (ACL)





**Wisconsin Department of Health Services**

Division of Long-Term Care

Office for Resource Center Development

**For more information, visit:**

<http://www.dhs.wisconsin.gov/ltcare/adrc>



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