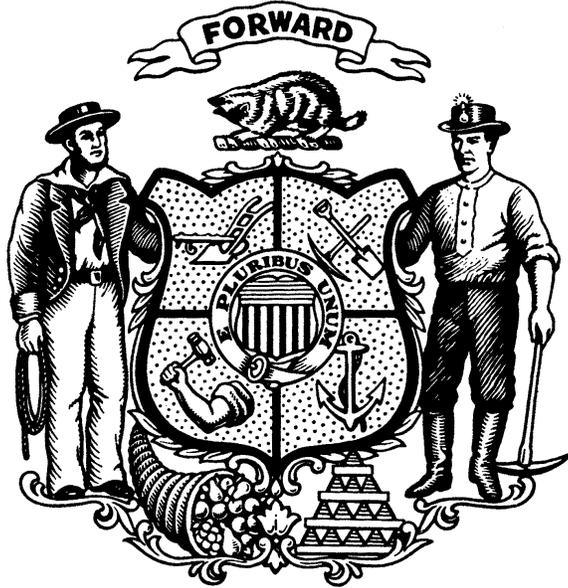


APPLICATION INSTRUCTIONS



To Contract As A

TRIBAL AGING AND DISABILITY RESOURCE SPECIALIST

Updated August 2019

Wisconsin Department of Health Services

Tribal Aging and Disability Resource Specialist (Tribal ADRS) **Application Process and Timeline**

- Tribal applicants may submit Notice of Intent to Submit Application when planning is far enough along for them to know they will be submitting an application and have tribal government support.
- Applications may be submitted whenever an applicant is ready to apply. Applications will be accepted at any time.
- Applications will be reviewed by the Department of Health Services.
 - DHS will identify any areas where additional work is needed to fulfill Tribal ADRS application requirements and request additional information as appropriate.
 - A site visit and/or oral interview may occur.
 - Tribe amends application, as necessary.
- DHS will issue a written notice of application approval and projected date when funding is expected to be available, if known. Approval means that an application is eligible to receive funding, when funding is available. It is not an award of funds.
- DHS will award the Tribal ADRS contract directly to the tribal organization.

**Email Notice of Intent, Questions and Completed
Application to:**

**Office for Resource Center Development
Department of Health Services
One West Wilson Street, Room 551
P.O. Box 2659
Madison, WI 53701-2659**

Email: dhsrcteam@wisconsin.gov

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Section A. Approval Process

A-1 Review and Evaluation of Applications

A-1.1 Review Process

Department staff will review each application to make certain all parts of the application were submitted. Completed applications will be reviewed and compared to application requirements. Applicants may be requested to submit additional information, to meet with or make a presentation to DHS staff to support and clarify their application, or to amend their application to better meet requirements. Applicants may also submit revisions or clarifications at their own initiative. The Department may request interviews, and/or request presentations and use the results in evaluating the application.

A-1.2 Evaluation Criteria

To be approved, an application must provide all information, assurances and attachments requested on the application form, [F-00576](#), and must document how all the requirements described in Sections C and D will be met. Applications should demonstrate knowledge and understanding of the mission of the Tribal ADRS, the needs of the target groups, the resources available to meet these needs, the scope of required Tribal ADRS services, and a realistic plan to reach these goals.

A-1.3 Right to Reject Applications and Negotiate Contract Terms

The Department reserves the right to reject any and all applications. The Department may negotiate the terms of the contract, including the award amount, with the selected applicants prior to entering into a contract.

A-2 Awarding of Contract

A-2.1 Award and Final Offers

The Department will award contracts only to those applicants who satisfy the evaluation criteria.

A-2.2 Notification of Approval

All applicants who respond to this application process will be notified in writing of the approval status of their application. Approval means that an application is eligible to receive funding, when funding is available. It is not an award of funds.

A-2.3 Appeal Process

Applicants may appeal a decision not to approve an application. Notices of Intent to Protest and protests are to be made in writing to the Administrator of the Division of Public Health. Protestors should make their protests as specific as possible and must identify statutes and Wisconsin Administrative Code provisions that are alleged to have been violated.

Any written Notices of Intent to Protest the denial of approval must be filed with:

Administrator
Division of Public Health
Department of Health Services
1 W. Wilson Street, Room 250
PO Box 2659
Madison, Wisconsin 53701-2659

Notices of Intent to Protest must be received in the Administrator's office no later than 10 working days after the Notice of Denial is issued.

Written protests must be received within 15 working days after the Notice of Denial is issued.

The decision of the Administrator may be appealed to the Secretary of the Department of Health Services within five (5) working days of issuance. The appeal must allege a violation of a Wisconsin statute or a section of the Wisconsin Administrative Code.

A-3 Termination of Contract

A contract issued subsequent to application approval may be terminated by the Department at any time at its sole discretion by delivering 30 days written notice to the contractor. Upon termination, the Department's liability will be limited to the pro rata cost of the services performed as of the date of termination plus expenses incurred with the prior written approval of the Department. In the event that the contractor terminates the contract, for any reason whatsoever, it will refund to the Department within 30 days of said termination, all payments made hereunder by the Department to the contractor for work not completed or not accepted by the Department. Such termination will require written notice to that effect to be delivered by the contractor to the Department not less than 30 days prior to said termination.

Section B. General Information

B-1 Introduction

The Tribal aging and disability resource specialist (Tribal ADRS) is a professional position funded by the state and employed by the tribe to assure that Indian Health Services (IHS) eligible individuals receive culturally appropriate information on aging and disability services and benefits, and receive support to access publicly funded long-term care programs including Family Care, PACE and Family Care Partnership (where available), and IRIS. The Tribal ADRS will assist IHS-eligible individuals to access services, as well as counseling and advocacy to overcome barriers to using services.

B-2 Purpose

This document provides information needed to prepare and submit an application for the implementation of a Tribal ADRS.

B-3 Procuring and Contracting Agency

The application review and approval process and any contract resulting from this application will be administered by the Wisconsin Department of Health Services. The contract administrator is the Office for Resource Center Development, Bureau of Aging and Disability Resources:

Office for Resource Center Development
Department of Health Services
Division of Public Health
1 W. Wilson St., Room 551
Madison, WI 53703
Email: dhsrcteam@wisconsin.gov
Fax: 608-267-3203

B-4 Funding and Duration of Contract

DHS will enter into a contract with each tribe which specifies the required functions of the Tribal ADRS and the funding level the State will provide to support these functions.

The funding from the Department will be a combination of General Purpose Revenue (GPR) and federal funding. Federal Medicaid administration matching funds are available for long-term care functional screen and information and assistance activities related to Medicaid, according to the methodology submitted by the Department to the Centers for Medicare & Medicaid Services (CMS). In order for the tribe to receive that portion of the allocation identified as Federal Medicaid Administration, the Tribal ADRS must participate in the 100% time reporting. The DHS Division of Public Health will train the Tribal ADRS in the 100% time reporting process. If the tribe chooses not to participate in 100% time reporting, the budget will be reduced by the amount identified as Federal MA Admin.

The Tribal ADRS contract shall be effective on the date indicated on the contract and shall run for the remainder of the calendar year from that date, with an option by mutual agreement of the agency and contractor, to renew annually.

B-5 Who May Submit an Application?

Any of the 11 federally recognized Wisconsin Indian tribes that choose the option to establish a Tribal ADRS position.

B-6 Collaboration with Local Agencies and Stakeholders

Applicant tribes are expected to coordinate with existing ADRCs in the tribal service area or with planning groups preparing for an ADRC.

The applicant tribe must provide assurances that the application is fully supported by tribal government and other tribal services to assure strong collaboration.

At a minimum, the following program areas should be involved in the planning for this position:

- Tribal aging programs
- Tribal human/social service programs, including long-term care for elders and persons with disabilities, when available
- Tribal income maintenance units, when applicable

Consultation with the tribal health services is also advisable.

An application must include evidence of collaboration between the tribe and the ADRC that will be serving the tribe.

All applications must be accompanied by tribal government endorsement of the application and a commitment to assure the availability of the Tribal ADRS position for all target groups (elders, adults with physical and intellectual/developmental disabilities and disabled individuals age 17 years 6 months transitioning from children's services to adult long-term care services).

B-7 Service Area

A Tribal ADRS service area is defined by the tribe, such as the tribal reservation, trust, or fee simple lands and surrounding areas where IHS-eligible individuals reside. The service area may include one or more counties and may be served by more than one ADRC. Tribal ADRS services are available to IHS-eligible individuals residing in the service area.

The Tribal ADRS must support IHS-eligible individuals who request assistance in accessing services from an ADRC (unless the IHS-eligible individual has requested that the Tribal ADRS not be involved). The Tribal ADRS must accompany IHS-eligible individuals to an ADRC if requested by the individual. If assistance has been requested and the Tribal ADRS does not accompany the individual, support will be alternatively provided over the phone, electronically, or by mail, or by otherwise coordinating with the ADRC serving the area where the customer is located. The Tribal ADRS is not otherwise expected to travel out of the Tribal ADRS service area.

Section C. Scope of Tribal Aging and Disability Resource Specialist

C-1 Introduction

Tribal ADRS provides Indian Health Services (IHS) eligible individuals, who are older adults or who have physical or intellectual/developmental disabilities, the resources needed to live with dignity and security, and achieve maximum independence and quality of life. The goal of the Tribal ADRS is to empower IHS-eligible individuals to make informed choices, to be culturally competent, and to streamline access to the right and appropriate services and supports.

Goals for Tribal ADRS are summarized below and described in detail in the scope of services between the Wisconsin Department of Health Services, Division of Public Health, and the Tribal ADRS (See <https://www.dhs.wisconsin.gov/adrc/pros/tribalspec.htm>).

C-2 Goals of the Tribal ADRS

The goals of the Tribal ADRS are as follows:

- To provide reliable, objective, and culturally appropriate information and counseling to help IHS-eligible individuals access resources and make informed decisions about long-term care and other needs related to age or disability.
- To help ADRC(s) better serve IHS-eligible individuals by:
 - Ensuring that tribal elders, adults with physical or intellectual/developmental disabilities, and their families know about, and are able to access, ADRC services
 - Making staff at area ADRC(s) aware of the resources available to IHS-eligible individuals
 - Educating ADRC staff about culturally appropriate ways to serve tribal elders and persons with disabilities
 - Assisting with gathering information needed to determine IHS-eligible individual's eligibility for public benefits or long-term care services
 - Serving as a customer advocate for IHS-eligible individuals using an ADRC.

C-3 Target Populations

The Tribal ADRS shall serve all of the following groups of IHS-eligible individuals, regardless of their financial means:

- Adults with intellectual/developmental disabilities
- Adults with physical disabilities
- Elders as defined by the tribe, including healthy elders and elders with disabilities or chronic health problems
- Youth with disabilities age 17 and 6 months or older, who are transitioning to the adult long-term care system.

The Tribal ADRS may provide information and referral services, access to the disability benefit specialist, and referral for emergency services to adults with mental illness and/or substance use disorders who are not elderly and do not have an intellectual/developmental or physical disability. Tribal ADRS grant funds may not be used to provide long-term care options counseling, short-term service

coordination, or other Tribal ADRS services to persons whose primary need is for mental health and/or substance use services.

C-4 Services to be Provided

The following is a summary description of the services that Tribal ADRS are expected to make available to members of their target populations, as required under the terms of the Tribal ADRS scope of services. The more detailed language of the full scope of services is available at <https://www.dhs.wisconsin.gov/adrc/pros/tribalspec.htm>.

The application must include a description of how the proposed Tribal ADRS will provide each of the following services.

C-5 Marketing, Outreach, and Public Education

The Tribal ADRS will conduct an ongoing program of marketing and outreach to IHS-eligible individuals to inform them about the services of the Tribal ADRS and the ADRCs in the tribal service area. The Tribal ADRS shall provide DHS with copies of the marketing and informational materials it distributes or plans to distribute to customers or the general public when requested to do so by DHS.

C-6 Information and Assistance

The Tribal ADRS will provide information and assistance (I&A) to members of the target populations and their families, friends, caregivers, advocates, and others who ask for assistance on their behalf. Providing information and assistance involves: listening to the individual, assessing their needs, and helping the individual to connect with service providers or gain information to meet the identified needs. Information and assistance must be provided in a manner convenient to the customer including, but not limited to, being provided in person, in the person's home or at the office of the Tribal ADRS, over the telephone, via email, or through written correspondence.

The information provided shall be accurate, objective, and relevant to the individual's expressed need and shall be presented in formats that are easy for the individual to understand.

The Tribal ADRS shall provide information and assistance on a wide variety of topics relating to the needs of elders and people with disabilities, including but not limited to:

- Living arrangements related to long-term care (e.g., information and assistance to people considering a move due to health, disability, or frailty).
- Disability and long-term care related services (e.g., in-home support, care management, respite, equipment, training, transition planning, independent living skills, death and dying issues).
- Paying for long-term care related services (e.g., public programs, long-term care insurance, other private resources).
- Health, health promotion, prevention and early intervention (e.g., rehabilitative care, healthy lifestyles, management of chronic conditions, home safety,

disease conditions, dementia, medically related care, medical decision-making, advance directives).

- Mental health services and supports.
- Alcohol and other drug abuse services and supports.
- Adult protective services, abuse, neglect, domestic violence, and financial exploitation.
- Employment, training, and vocational rehabilitation.
- Financial and other basic needs (e.g., food, money, shelter, paying for medical care and medications, etc.).
- Transportation.
- Nutrition (e.g., congregate meals, home-delivered meals, counseling).
- Home maintenance (e.g., chores, yard work, home safety).
- Legal issues (e.g., tax laws, power of attorney, guardianship, consumer rights, advocacy, discrimination, and grievances).
- Education, recreation, life enhancement, volunteerism.
- Alzheimer's disease and other dementias.
- Housing (senior housing, special needs housing, public and low income housing, etc.).
- Caregiving.
- Death and dying issues and supports, including hospice and palliative care.

The Tribal ADRS shall follow up with individuals to whom they have provided information and assistance to determine whether the customer's needs were met and whether additional information or assistance is needed, consistent with the Department's Information and Assistance Follow-Up Policy.

C-7 Long-Term Care Options Counseling

The Tribal ADRS shall provide options counseling to help people make informed choices about long-term care. Options counseling is a more time-intensive service than information provision and includes a face-to-face meeting whenever possible. It is intended to help consumers evaluate their strengths and preferences and weigh their options, in addition to educating them regarding available long-term care services. Options counseling is typically provided as an extension of information and assistance when a person is dealing with major life decisions.

Options counseling should cover the following:

- A exploration of the individual's personal history, preferred lifestyle, and residential setting; goals for the future, functional capacities and limitations; financial situation; and other relevant information needed to identify and evaluate options available;
- The full range of long-term care options available to the individual, including but not limited to home care, community services, residential care, nursing home care, post-hospital 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 and the functional and financial criteria for receiving publicly funded long-term care and for participating in the Medicaid fee-for-service system;
- Factors that the individual may want to consider when choosing among the long-term care programs, services and benefits, including cost, quality, service

restrictions or limitations, outcomes of importance to the individual, and available resources;

- The advantages and disadvantages of the various options in light of the individual's situation, values, resources, and preferences.
- Assistance for the individual in identifying next steps to implement their decision, when appropriate;
- Options and support for the caregiver as well as for the individual with long-term care needs, as appropriate.

The information that is provided in long-term care options counseling shall be timely, accurate, thorough, unbiased, and appropriate to the individual's situation. Long-term care options counseling must be objective, thorough and responsive to the needs of the individual. Counseling shall not attempt to persuade the individual to choose one program or provider or withhold information about any suitable option, program, or provider.

C-8 Access to Elderly Benefits Counseling

Elderly benefit specialists (EBS) help answer questions and solve problems related to Social Security, Medicare, health insurance and other public and private benefits for people ages 60 or older. EBS are available to tribal elders through the tribal aging unit or the Great Lakes Inter-Tribal Council (GLITC). The Tribal ADRS should be aware of the services provided by the EBS and make referrals where appropriate.

C-9 Access to Disability Benefits Counseling

Disability benefit specialists (DBS) ensure that adults under age 60 with intellectual/developmental disabilities, physical disabilities, mental illness, and/or substance use disorders receive information about and assistance in obtaining or retaining public and private benefits for which they are eligible. Adult IHS-eligible individuals with a disability are entitled to use the Tribal DBS at the Great Lakes Inter-Tribal Council or the DBS at the ADRC serving their tribe. The Tribal ADRS shall make referrals to the DBS consistent with the customer's preference. The Tribal ADRS shall be available to assist IHS-eligible individuals, if needed, when meeting with the ADRC's DBS.

C-10 Access to Publicly Funded Long-Term Care Programs (Family Care, Family Care Partnership, PACE, and IRIS)

ADRCs are the designated entry point for publicly funded long-term care, unless the Tribe opts to provide the service themselves through the hiring of a Tribal ADRS, and through the provisions of Tribal ADRS services. Publicly funded long-term care programs include Family Care, IRIS, and the PACE and Family Care Partnership programs, where available.

The Tribal ADRS is responsible for following established policies and procedures, in collaboration with the ADRC and with the regional income maintenance consortium or the tribe's income maintenance unit, to ensure that IHS-eligible individuals who are eligible for and/or entitled to these programs have access to them. The tribe may choose to have the Tribal ADRS perform the long-term care functional screen and provide assistance with the financial eligibility determination process and

enrollment or disenrollment counseling, or to refer IHS-eligible individuals to the ADRC for these services.

If the Tribal ADRS refers IHS-eligible individuals to the ADRC for these services, the Tribal ADRS may accompany the tribal member through the processes in coordination with the ADRC as necessary and when requested or agreed to by the individual.

If the Tribal ADRS will perform the long-term care functional screen and provide assistance with financial eligibility determination process and enrollment or disenrollment counseling, please see C-14 Election of Optional Services for more information.

C-11 Access to Other Public Programs and Benefits

When IHS-eligible individuals contact the Tribal ADRS and appear to be either eligible for or interested in receiving Medicaid, SSI, SSDI, SSI-E, FoodShare, LIHEAP, W-2, Childcare Caretaker Supplement, or other public benefits, the Tribal ADRS should refer the IHS-eligible individual to the EBS, the DBS, or tribal, county, regional, state and/or federal agencies responsible for determining the individual's eligibility to receive these benefits. The Tribal ADRS is not expected to know all eligibility criteria for these programs but should know how to make referrals to the appropriate agencies and may assist the IHS-eligible individual in making the initial contact.

C-12 Access to Elder/Adults-at-Risk and Adult Protective Services

As the central point of contact for tribal elders and people with disabilities, the Tribal ADRS may receive calls related to abuse or exploitation and may encounter individuals who are at risk through outreach, information and assistance, and other Tribal ADRS activities.

The Tribal ADRS should know the warning signs; be prepared to identify persons who may be at risk of abuse, neglect, self-neglect, or financial exploitation; and have procedures in place to assure that people in need are promptly connected with the responsible entities for:

- Abuse and neglect services.
- Assistance in obtaining physical care, housing, medical care, medications and food.
- Voluntary or court-ordered protective services under Wis. Stat. ch. 55 when needed, to protect an individual or protect others from the individual. Mental health services and emergency detention under Wis. Stat. ch. 51 when needed.
- Law enforcement.
- Guardianship.
- Watts reviews.
- Representative payee.
- Domestic violence services involving vulnerable adults.
- Sexual assault services involving vulnerable adults.

These services may be provided by the tribe, the county, or a combination of both.

C-13 Client Advocacy

Advocacy is a primary responsibility of the Tribal ADRS, especially helping IHS-eligible individuals understand and be able to effectively use and access the long-term care system, benefits, and services, including those of the ADRC. The Tribal ADRS shall inform IHS-eligible individuals of their rights and responsibilities; provide information about rights to long-term care services and benefits, self-advocacy and independent advocacy services; assist those IHS-eligible individuals who need help in understanding how to resolve service system disputes or violation of rights complaints, appeals and grievances with units within the tribe, county, state or federal government and other service providers; and assist in linking IHS-eligible individuals with advocates when appropriate.

The Tribal ADRS shall assist IHS-eligible individuals to assure they receive appropriate advocacy and representation. The Tribal ADRS shall link IHS-eligible individuals with appropriate advocacy resources, including elderly and disability benefit specialists, Board on Aging and Long-term Care Ombudsman, the Family Care/IRIS Ombudsman at Disability Rights Wisconsin, federally designated protection and advocacy organizations, independent living centers, and other state or local advocacy organizations.

C-14 Election of Optional Services

Below are listed optional services a tribe may elect to provide through the Tribal ADRS. The tribe must indicate which optional services it elects on the application. If the tribe elects to have the Tribal ADRS perform an optional function, the Tribal ADRS shall comply with the requirements related to that function contained in the ADRC Scope of Services and any related Department policies. If the Tribal ADRS does not provide these services, IHS-eligible individuals shall be referred to the ADRC for these services as necessary and appropriate. The Tribal ADRS shall assist and support the IHS-eligible individual in accessing services through the ADRC.

Services provided by the Tribal ADRS that are not listed as either required or optional in this scope of services must be identified in the Tribal ADRS job description and funded from a source other than from the Tribal ADRS Scope of Services agreement.

C-14.1 Preadmission Consultation and Assistance with Resident Relocations

When the Tribal ADRS receives a referral for an IHS-eligible individual who is considering admission to a nursing home or assisted living facility, the Tribal ADRS shall offer to provide options counseling to help the person understand and evaluate the possible alternatives. If the tribe elects to provide preadmission consultation and assistance with resident relocations, the Tribal ADRS shall, when requested, assist residents in relocating from a nursing home, intermediate care facility for individuals with intellectual disabilities (ICF-IID), or facility that is downsizing or closing.

C-14.2 Short-Term Service Coordination

To the extent financial and personnel resources permit, the Tribal ADRS may provide short-term service coordination to assist IHS-eligible individuals and their families in arranging for services. The tribe shall have policies and procedures in place, consistent with the Department's Statewide Short-Term Service Coordination Policy, to identify when short-term service coordination will be provided and to assure that the service remains short-term in nature (i.e., less than 90 days) and does not entail providing ongoing support to the individual. Short-term service coordination may be provided in conjunction with information and assistance, options counseling, or other services provided by the Tribal ADRS.

C-14.3 Health Promotion, Prevention, and Early Intervention Services

To the extent and time resources allow, the Tribal ADRS may provide prevention education and programming for older people and adults with disabilities. If the tribe does not elect to provide health promotion, prevention, and early intervention services through the Tribal ADRS, the Tribal ADRS shall refer the IHS-eligible individuals to the ADRC or tribal aging unit.

C-14.4 Dementia-Specific Programs, Activities, and Services

A tribe may elect to have the Tribal ADRS facilitate dementia-friendly communities and provide other dementia-specific programming, activities, and services not covered under other sections of this scope of services, depending on funding availability. Tribal ADRS grant funds may not be used to provide respite, home care, or other direct care or support for people with dementia or their caregivers. Such programs, activities, and services shall be informed by the Dementia Care Guiding Principles found at <https://www.dhs.wisconsin.gov/publications/p01022.pdf>.

C-14.5 Eligibility and Enrollment-Related Functions for Publicly Funded Long-Term Care

Administration of the Long-Term Care Functional Screen and Enrollment and Disenrollment Counseling

At the tribe's discretion, the Tribal ADRS may administer the Long-Term Care Functional Screen (LTCFS) to IHS-eligible individuals seeking publicly funded long-term care and provide enrollment and disenrollment counseling for IHS-eligible individuals considering services provided through managed long-term care or IRIS. If the tribe elects to provide these services, the Tribal ADRS must have the qualifications and successfully complete the training necessary to administer the LTCFS and abide by all screen policies and protocols.

If the tribe elects to administer the LTCFS and provide enrollment counseling, the Tribal entity employing the Tribal ADRS becomes a LTCFS screening agency and agrees to joint LTCFS oversight with the Department.

The Tribal ADRS shall provide enrollment counseling to IHS-eligible individuals who have been found to be eligible for and are considering enrolling in publicly funded long-term care including:

- Explaining the eligibility requirements, cost sharing requirements, and basic features of the publicly funded managed care, fee-for-service Medicaid, and self-directed support programs that are available to the individual.

- Reviewing, discussing and providing the individual with objective information comparing covered benefits, provider networks, responsibility for coordination of care, opportunities for self-direction and choice, and other features of Family Care, IRIS and, where available, Family Care Partnership and/or PACE using Department-developed materials.
- Informing the individual that MCOs are required to make all covered services available to enrollees who need them.
- Providing additional objective information relevant to the individual's choice, using materials required by the Department.
- After the individual selects a program, reviewing the appropriate Department-provided MCO or ICA options charts with the individual and provide other objective information comparing the available MCO and/or ICA options.
- Providing information in a timeframe that enables the potential enrollee to use the information when choosing among available MCOs and ICAs.
- Discussing the enrollment process and the timing of enrollment, including any potential waits or delays, and establishing the individual's desired enrollment date.
- Providing information about the enrollee's right to disenroll, the disenrollment process, disenrollment counseling, the right to appeal, ombudsman and other resources to assist with dispute resolution, and the opportunity to enroll in other programs for which the individual is eligible.
- Refer people who express an interest in IRIS to the ICA of their choice. Provide the ICA with the information it needs to complete the counseling process, including the long-term care functional screen, Medicaid status, IRIS budget estimate, cost share, and other data as directed by the Department.
- Obtain signed enrollment forms from individuals who decide to enroll in managed care, in accordance with the Department's Long-Term Care Authorization, Enrollment, and Disenrollment Form Signature Policy and using the standard forms provided by the Department.

The Tribal ADRS shall provide information and counseling to assist IHS-eligible individuals in the process of disenrollment from managed care or IRIS, whether requested by the customer or the program including providing information and counseling about services and programs that would be available to the person if they disenroll, including information on other MCO and ICA options, where available, and fee-for-service Medicaid, and private pay options.

The Tribal ADRS will assist with processing enrollments and disenrollments in accordance with the Department-issued guidance.

Assistance with Financial Eligibility Determination

The tribe will decide whether the tribal economic support unit will determine financial eligibility for long-term care programs and whether the Tribal ADRS will assist IHS-eligible individuals in gathering information with the application process. IHS-eligible individuals may have the option of using either the tribal economic support unit, where available, or the regional income maintenance consortium when applying for long-term care services.

If the tribe elects to administer the LTCFS and provide enrollment counseling, or assist with financial eligibility, the tribal entity employing the Tribal ADRS must be independent from any managed care organization or IRIS consultant agency in order to assure that IHS-eligible individuals receive long-term care eligibility

determination and counseling in an environment that is free from conflict of interest.

Section D. Operational and Administrative Requirements

D-1 Oversight and Supervision

The Tribal ADRS position is supervised by the tribe. The tribe shall identify the organization, position, and individual responsible for supervision of the Tribal ADRS position. The tribe shall maintain an organization chart showing the Tribal ADRS position and its relationship to the larger tribal organization.

Guidance and quality oversight at the state level is provided by the DHS Office for Resource Center Development (ORCD). When questions arise or assistance is needed, the Tribal ADRS or their supervisor shall communicate with the assigned regional quality specialist in the DHS ORCD, who will provide appropriate technical assistance.

The Tribal ADRS shall participate in bi-monthly check-in calls with the regional quality specialist and Tribal ADRS meetings.

D-2 Tribal ADRS Position Description

The tribe shall have a position description for the Tribal ADRS that includes all required and optional functions for the position and describes the qualifications required of the applicant consistent with the Tribal ADRS scope of services.

If the position will have duties in addition to the required and optional services described in the scope of services, these additional duties shall be identified in a separate section of the job description, together with an estimate of the proportion of the person's time that is expected to be devoted to these duties.

D-3 Tribal ADRS Qualifications and Training

D-3.1 Minimum Requirements for the Tribal ADRS

Education and Experience

The Tribal ADRS shall meet the following minimum requirements at the time of hire or have an approved waiver from the Department of Health Services prior to being offered the job:

- Have a Bachelor of Arts or Science degree (preferably in a health or human services related field), a license to practice as a registered nurse, or be a licensed health professional employed by a tribal health program.
- Have the equivalent of at least one year of full-time experience working with one or more of the client populations served by the Tribal ADRS position (elderly or adults with physical or intellectual/developmental disabilities). Qualifying work experience may be paid or unpaid and may include internships, field placements, and volunteer work.

A waiver of education and/or experience requirements can be requested from the Department in the event that the candidate lacks the degree and/or experience described above.

- Requests for exception to the education and/or experience requirements must be submitted to and approved by the Department prior to the tribe

making the job offer. Requests shall be made using form F-00054 at <https://www.dhs.wisconsin.gov/forms/f0/f00054.doc> and submitted to dhsrcteam@wisconsin.gov.

- Approval of waiver requests is discretionary. The Department is not obligated to approve a request for waiver of education and experience requirements.

Knowledge and Skills

The Tribal ADRS shall have the following knowledge and skills:

- Strong computer, oral and written communication skills.
- General knowledge of all target populations served.
- Knowledge and familiarity with tribal and local area resources and statewide resources available for client referral purposes.
- Understanding of the Wisconsin long-term care delivery system.
- Understanding of tribal services available to members.
- Ability to establish and maintain productive working relationships with ADRC(s) and county agency staff, clients, internal and external agencies.
- Ability to meet reporting requirements and deadlines.
- Ability to understand the individual's concerns, and be able to offer potential resources and solutions.
- Ability to use person-centered thinking approach.
- Ability to develop rapport through active listening skills; to draw people out, validate and support individuals as they sort through options and weigh these options through the customer's own set of values and preferences.
- Communication skills that are easy for people to follow, while using everyday language and having the ability to break down complex information or processes into manageable steps.
- Understanding the importance to check in regularly for understanding and see follow-up as an extension of their initial conversation with customers.
- If performing the long-term care functional screen:
 - Knowledge of medical factors that impact adults who are older or have physical and/or intellectual/developmental disabilities.
 - Ability to objectively follow complex written instructions.
 - Experience with observing and interpreting situations, visual cues, facial expressions, and interactions.
 - Ability to ask probing questions of a very personal nature using a variety of communication strategies to gather information appropriate for the person.

Certification

The Tribal ADRS shall be certified by the national Alliance of Information and Referral Systems (AIRS) as a Certified Information and Referral Specialist (CIRS or CIRS A/D), obtain AIRS certification within two years of hire, or report to a supervisor who is AIRS certified.

D-3.2 Training

The tribe shall ensure that the Tribal ADRS has the training needed to provide all required services in a competent and professional manner, including but not limited to an orientation to the mission and responsibilities of the ADRC and the Tribal

ADRS, the populations served and their needs, how to recognize and handle emergencies, conflicts of interest and specific job-related duties.

The Tribal ADRS shall participate in Tribal ADRS orientation and training provided by the Department and shall have opportunities to participate in additional trainings provided by the local ADRC and in statewide and regional trainings provided or sponsored by the Department.

D-4 Policies and Procedures

In addition to those required elsewhere the Tribal ADRS scope of services, the tribe shall have written policies and procedures consistent with the Department's Statewide Policies for the following:

D-4.1 Information and Assistance Follow-Up Policy

The Tribal ADRS shall follow up with people to whom they have provided information, referrals, and assistance to determine whether the individual's needs were met and whether additional information and assistance is needed, consistent with the Department's Information and Assistance Follow-Up policy.

D-4.2 Conflict of Interest

The tribe shall require the Tribal ADRS to sign a written assurance acknowledging their obligation to be objective, consumer-centered, and independent of influence from any managed care organization, IRIS consultant agency, tribal organization, provider of service or other source where there is a potential for conflict of interest, consistent with the Department's Conflict of Interest Policy.

D-4.3 Confidentiality

The Tribal ADRS shall respect the privacy of their customers, provide confidentiality on all matters discussed with the client, and implement the Department's Confidentiality Policy. The Department's Confidentiality Policy does not supersede a Tribe's more strict policy.

D-4.4 Grievances and Appeals

The tribe shall maintain and implement due process policies and procedures to review and resolve grievances about Tribal ADRS services and to inform individuals of their appeal rights, consistent with the Department's Grievance and Appeal Policy.

D-4.5 Short-Term Service Coordination (if applicable)

The tribe shall identify when short-term service coordination will be provided and assure that the service remains short-term in nature and does not entail providing ongoing support to the individual in accordance with the Department's Short-Term Service Coordination Policy.

D-4.6 Long-Term Care Authorization, Enrollment and Disenrollment Form Signature (if applicable)

If an elected optional service, the tribe shall obtain signed enrollment forms for individuals who decide to enroll in publicly funded long-term care in accordance with the Department's Long-Term Care Authorization, Enrollment and Disenrollment Form Signature Policy.

D-5 Management Information Systems

The tribe shall maintain management information systems to facilitate access to information about programs, services and providers; track the services provided to customers; and produce the encounter activity reports required by DHS.

The Tribal ADRS may operate SAMS IR or may choose to meet this requirement with a different system that is capable of providing the same data in a compatible format.

The Tribal ADRS shall maintain, keep up to date, and use an electronic resource database consistent with standards for database content and structure established by Department.

The resource database shall support the provision of information and assistance, options counseling, and other required Tribal ADRS services. The resource database shall contain detailed information about the full range of programs and services available for older people and people with disabilities in the communities served by the Tribal ADRS. The resource database shall include information relating to each of the information and assistance topics, including the name, contact information, and key features of each program or service and, where applicable, cost, regulatory compliance information, eligibility requirements, and application procedures.

The tribe shall designate one person, either the Tribal ADRS or someone to support the Tribal ADRS, to be the resource database lead and one person to be the client tracking database lead. Each lead has responsibility for ensuring the integrity of the information contained in the assigned database, supporting Tribal ADRS in their use of the database, serving as a contact for the Department regarding the database, and participating in any Department-required training and/or user groups.

If the tribe does not operate SAMS IR, the Tribal ADRS shall provide access to its client tracking system for its assigned regional quality specialist for quality assurance.

D-6 Accessibility and Cultural Competence

The Tribal ADRS understands and meets the unique needs, values and expectations of the tribal community and provides a cultural bridge between the ADRC staff and IHS-eligible individuals. The Tribal ADRS will provide or arrange training and technical assistance for ADRC staff serving the area where IHS-eligible individuals reside, including about the resources available through the tribes and about culturally appropriate ways of serving tribal elders and persons with disabilities.

The Tribal ADRS is expected to effectively assist tribal elders and individuals who have physical or functional limitations and/or language or cultural differences that may make it difficult for them to access, communicate, or use the services of either the Tribal ADRS or the ADRC. Toward this end, the Tribal ADRS shall:

- Have a thorough knowledge of the services and systems that make up long-term care in Wisconsin as well as the tribal specific services available to members.
- Be available in locations that are physically accessible.
- Have the ability to meet face-to-face with people where they live on an as needed basis.
- For people with cognitive disabilities, provide opportunities for family members, friends and others who know the IHS-eligible individual and can convey the person's needs and preferences to be included in the provision of Tribal ADRS services.
- Have the capacity to communicate with non-English speaking individuals, people who are deaf or hard of hearing, and people with physical or visual impairments. This may involve using an interpreter, sign language interpreter, TDD, Wisconsin Relay, Braille, large print, or other special communications techniques.
- Be available to accompany IHS-eligible individuals when receiving services from the ADRC, including the long-term care functional screen and enrollment counseling.

The tribe is responsible for paying for interpreters or securing communication assistance for services provided by the Tribal ADRS at no cost to IHS-eligible individuals.

D-7 Privacy and Confidentiality

The Tribal ADRS shall respect the privacy of their customers and provide confidentiality for interactions with the customers and, at a minimum, implement the Department's Confidentiality Policy. The Department's Confidentiality Policy does not supersede a tribe's more strict policy. The tribe shall ensure the confidentiality of information in any system that contains individual client information. The tribe shall require each user who has access to systems containing individual client information to sign a confidentiality agreement before being given access to the systems.

D-7.1 Private Meeting Space

The Tribal ADRS shall have private office space or timely access to private meeting space where they can meet for confidential conversations with individuals and families. The Tribal ADRS shall have access to telephones and computers with high speed internet access in their office or other private meeting place(s) in order to be able to access databases, benefits assessment tools, and other information that may need to be used during the consultation. When private offices are not available, the Tribal ADRS staff should have sole or priority access to conference rooms for private consultations.

The tribe shall provide adequate space, furnishings, and equipment to provide for the secure storage of confidential information for the Tribal ADRS.

D-7.2 Permission to Access Records

The Tribal ADRS shall ask an IHS-eligible individual or, when applicable, the IHS-eligible individual's guardian or activated power of attorney for health care to sign a release of information form for any confidential record that Tribal ADRS need to examine. The records and related signed release of information forms shall be kept in the file that the Tribal ADRS has for the individual.

D-7.3 Exchange of Client Information and Records

Information about individual customers shall be used only as needed for its intended purposes. The Tribal ADRS shall not share records that contain personally identifiable information concerning individuals who receive services from the Tribal ADRS without the individual's informed consent, except when the exchange of information is necessary for the delivery of client services or as otherwise required or permitted by law (e.g., to report abuse or neglect of an elder or vulnerable adult; to cooperate with a public health, adult protective services, or elder/adult-at-risk investigation; to cooperate with law enforcement investigation; pursuant to a court order; or in an emergency situation).

D-7.4 Compliance with State or Federal Laws and Regulations

The Tribal ADRS shall comply with all applicable federal and state laws and administrative rules concerning confidentiality.

D-8 Grievances and Appeals

The organization responsible for the Tribal ADRS oversight shall develop and implement a process to review and resolve grievances about the services provided by the Tribal ADRS, including handling appeals related to functional eligibility and enrollment in managed long-term care or IRIS if these services are provided by the Tribal ADRS, in accordance with the Department's Grievance and Appeal Policy. These procedures shall take into consideration tribal governance and also allow for an external review process, should the tribe be unable to resolve the grievance.

The tribe shall refrain from any reprisal or threat of reprisal against a person for registering a grievance or appeal.

D-9 Community Needs Identification

The Tribal ADRS is in a unique position to identify potential gaps in services for IHS-eligible individuals. The Tribal ADRS will work with the tribe and ADRC to identify such gaps and communicate those needs to the tribe government, the ADRC governing board(s), the MCO(s) and ICA(s) serving the area, and the Department of Health Services.

D-10 Reporting and Records

The Tribal ADRS is responsible for submitting data reports as necessary to meet the funding program requirements, qualify for federal financial participation, evaluate service quality and adequacy, and inform state and local decision-making. Required reports include:

- **Monthly expenditure reports on form F-00642**, to be completed and submitted in accordance with applicable Department instructions.
- **100% time report for federal claiming**. The Tribal ADRS is required to use the 100% time reporting format developed by DHS for the purpose of claiming federal Medicaid administration match and to submit monthly time reports to the Office for Resource Center Development by the 20th of the following month. If the Tribal ADRS does not 100% time report, the tribe must not request reimbursement of expenses to include federal funds.
- **Monthly information and assistance activity reports**, to be submitted electronically to the Department's data warehouse no later than the 20th of the month immediately following the month for which the report is prepared, or the first business day thereafter when the 20th falls on a weekend or holiday.
- **Annual expenditure reports**, using the standard form provided by the Department and submitted to the Office for Resource Center Development.
- **Annual update**, to be submitted to the Office for Resource Center Development Regional Quality Specialist assigned to the tribe.

Reports should be submitted using the formats and following the procedures established by the Department. The Tribal ADRS shall cooperate with Department research and monitoring activities when requested.

D-11 Coordination with the Aging and Disability Resource Center

The Tribal ADRS and disability resource specialist shall develop a procedure with the ADRC(s) serving the area where IHS-eligible individuals reside to document coordination of services, the smooth transfer of IHS-eligible individuals, and provide timely ADRC and Tribal ADRS services.

Section E. Preparing and Submitting an Application

E-1 Notice of Intent to Submit an Application

Applicants are requested to submit a Notice of Intent to Submit an Application for Tribal Aging and Disability Resource Specialist (Tribal ADRS) via email to the Office for Resource Center Development at dhsrcteam@wisconsin.gov using form [E-00575](#). The Notice of Intent is for work planning purposes and does not commit an agency to submitting an application.

E-2 Timeline

Applications may be submitted at any time.

E-3 General Instructions

The evaluation and approval of applications will be based on the information submitted in the application together with any subsequent revisions, supplements, presentations, or interviews, which may be requested by the Department if clarification is needed. Failure to respond to each of the requirements in the application may delay approval or be the basis for rejecting an application.

E-4 Incurring Costs

The State of Wisconsin is not liable for any cost incurred by applicants in replying to this application.

E-5 Presentations and Interviews

Applicants are required to discuss their application with Department staff. This discussion may be in person or via conference call. The purpose of the discussion is for applicants to demonstrate understanding of and ability to meet the Tribal ADRS scope of services requirements, answer questions, and identify areas in the application that may need further work.

E-6 Clarification and/or Revisions to the Specifications and/or Contract Requirements

Questions concerning the application forms and instructions may be directed to the ORCD mailbox at: dhsrcteam@wisconsin.gov or the ORCD regional quality specialist serving the area where the proposed Tribal ADRS is located.

E-7 Reasonable Accommodations

The Department will provide reasonable accommodations, including the provision of informational material in an alternative format, for qualified individuals with disabilities upon request.

E-8 Submitting the Application

Applicants must submit an electronic copy of all required application materials for their application to be accepted.

Electronic documents should follow the following naming conventions: Name the completed electronic application document, "Tribal ADRS - [name of tribe]". For example, "Tribal ADRS – Ho Chunk." Name electronic attachments using the following naming convention: "Tribal ADRS - [name of tribe]–[name section or subsection to which the attachment is applicable]". For example, "Tribal ADRS – Ho Chunk – Organization Chart".

Applications should be emailed to dhsrcteam@wisconsin.gov. The original and hard copies of the applications should be sent to:

Office for Resource Center Development
Department of Health Services
Division of Public Health
1 W. Wilson St., Room 551
Madison, WI 53703

E-9 Withdrawal of Applications

Applicants may withdraw an application in writing at any time before a contract is signed.

Section F. Application Format and Contents

F-1 Application Format and Signatures

The application should be prepared using the application form [F-00576](#).

Answers to the questions on the application form should be in 12-point font with 1.5 or 2 line spacing, with the name of the applicant included in a header or footer of each page. The original and hard copies should be printed on 8.5 x 11 paper.

An authorized signature is required on the Applicant Identification Page of the application.

The application should not exceed 20 pages, excluding worksheets and attachments. It may have fewer pages if all requirements are met. Reviewers will appreciate clarity and conciseness in all sections.

F-2 Application Organization

The application form and materials are arranged in the following order:

Part I. Applicant Information

Part II. Executive Summary (2-page maximum)

Part III. Project Proposal (20-page maximum)

- a. Administrative Framework Proposed
- b. Provision of Tribal ADRS Services
- c. Customer Service Strategy
- d. Tribal ADRS Annual Budget

Part IV. Attachments

- a. Tribal Government Resolution(s) or other action authorizing the Tribal ADRS Application
- b. Tribal ADRS position description
- c. Organizational Charts showing where Tribal ADRS fits into tribal organization
- d. Other Attachments (optional)

F-3 Application Content

Applications should describe how the Tribal ADRS will provide each of the services described in Sections C and D of these instructions, using the questions on the application form as a guide.

Part I - Applicant Information

The first page of the application contains identifying information regarding the applicant planned for the tribal service area.

Part II - Executive Summary (2 pages maximum)

The purpose of the Executive Summary is to condense and highlight the contents of the application in a manner that provides the reviewers with an understanding of the entire application. This section should include an identification of the tribal service area, any ADRS(s) in that area, a description of the overall approach to the scope of work of the Tribal ADRS described in Sections C and D of these instructions,

including the relationship with the ADRC(s) serving the area. It should also highlight any unique characteristics of the application.

Part III - Project Proposal (not to exceed 20 pages, excluding worksheets and attachments)

a. Administrative Framework Proposed

Provide a brief description of the tribal service area covered by this position. Also include in this section a description of the oversight body and direct supervisor for this position. As an attachment, include an organizational chart showing the location of this position and its relationship to the larger tribal organization.

b. Provision of Tribal ADRS Services

Describe how the required Tribal ADRC services described in the Tribal ADRC scope of services and summarized in Sections C and D of these instructions will be provided.

c. Customer Service Strategy

The Tribal ADRS will be out of the office much of the time. Describe how IHS individuals will contact the Tribal ADRS and how the tribe will assure a prompt response.

d. Tribal ADRS Annual Budget

It is expected that majority of funding will be used for the salary and fringe of the Tribal ADRS, additional funds should be used to directly support the work of the Tribal ADRS in such areas as travel, telephone, computer, training and other direct expenses to carry out the work of the Tribal ADRS.

Provide an estimated 12-month budget for the Tribal ADRS using the worksheet provided in form F-00576A. Some line items may not be applicable to all applicants. Additional line items may be added as needed. Fringe benefits should be calculated utilizing the applicant's current rate. There will be an opportunity to amend the budget when the contract is issued.

MA match funding is equal to a percentage of the total budget for the Tribal ADRS. The state estimates this to be 28% based on prior year reporting by the ADRCs. We encourage applicants to use this rate when preparing the annual budget.

Part IV - Attachments

The application should include the following attachments:

- a. Tribal Government Resolution(s)/Action Authorizing the Tribal ADRS Application
- b. Tribal ADRS Position Description
- c. Organization Chart
- d. Other Attachments (optional)

Section G. Forms and Attachments

G-1 Notice of Intent to Submit

Email the Notice of Intent to Submit to the Office for Resource Center Development at DHSRCTeam@wisconsin.gov. Please use form [F-00575](#).

G-2 Application Forms

Use the application forms [F-00576](#) (Application to Contract as a Tribal Aging and Disability Resource Specialist) and [F-00576A](#) (Tribal ADRS Annual Budget) to complete the application.

G-3 Tribal Government Resolution/Action Authorizing the Tribal ADRS Application

Attach a resolution/action from tribal government authorizing submission of the Tribal ADRS application. The document should identify the applicant organization(s) and authorize the organization(s) to apply on behalf of the tribe.

G-4 Tribal ADRS Position Description

Attach a position description for the Tribal ADRS that includes the mandatory functions for the position and describes the qualifications required of the applicant.

G-5 Organization Chart

Attach an organizational chart showing the Tribal ADRS position and its relationship to the larger tribal organization.

G-6 Other Attachments (Optional)

If attaching any other supporting documents, be sure to reference them in the body of the application.