



WISCONSIN DEPARTMENT
of HEALTH SERVICES

Wisconsin
Adult Protective Services
Conference

**Partnerships and Protections:
Opportunities and Challenges in a
Multi-Disciplinary Approach to Adults at Risk**

A Virtual Experience
October 13–14, 2021

Special Session:
Ethics and Boundaries for Social Workers
October 15, 2021

included with conference registration!

**Full Conference Registration:
\$99**

**includes 11.5 CEH, with 4.0
Ethics and Boundaries CEH**

Register here:

[APS Conference Registration](#)



AGENDA AT-A-GLANCE

Wednesday, October 13

- | | |
|-----------------------|---|
| 9–9:15 a.m. | Conference Opening |
| 9:15–10 a.m. | Keynote Speaker |
| 10:15–11:30 a.m. | “A” Breakout Sessions |
| 11:30 a.m.–12:15 p.m. | Listening Session for County and Tribal Adult Protective Services Staff |
| 12:15–1 p.m. | Lunch Break |
| 1–2:15 p.m. | “B” Breakout Sessions |
| 2:15–2:30 p.m. | Wrap-up, looking at tomorrow |

Thursday, October 14

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|-----------------|-----------------------|
| 9–9:10 a.m. | Conference Opening |
| 9:15–10:30 a.m. | “C” Breakout Sessions |
| 10:45–12:00 pm | “D” Breakout Sessions |
| 12–12:45 p.m. | Lunch Break |
| 12:45–2:30 p.m. | Keynote Speaker |

Friday, October 15

- | | |
|---------------|--|
| 8:00–12:30 pm | Ethics and Boundaries for Social Workers |
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Wednesday, October 13

9–9:15 a.m. | Welcome, opening remarks

Office of the Secretary – Department of Health Services

Secretary-designee Karen Timberlake/Deputy Secretary Julie Willems Van Dijk

9:15 a.m. - 10 a.m. | Keynote Address



Alonzo Kelly

Strategic Leadership Partner,
Executive Coach, Kelly Leadership Group

The Art of Asking Better Questions: How the Right Questions Lead to More Efficient and Effective Outcomes

This fully participatory presentation assists in creating an inter-culturally inclusive work, learning, and play environment for all. This learning journey will focus on the professional development of participants aimed at increasing knowledge and ability to use critical thinking skills to make an authentic inquiry, apply appropriate meaning to terms and phrases, solve problems, communicate confidently, and foster more collaborative work environments rooted in authentic relationships.



Wednesday, October 13

10:15–11:30 a.m. | “A” Breakout Sessions

A1: Elder Financial Exploitation

Peter Tempelis and April DeValkenaere will review how to effectively investigate complex, criminal elder financial exploitation and public assistance fraud cases; discuss ways to prove cases when a victim is unavailable as a witness, such as due to death or health condition; and examine the collaboration necessary within the prosecution team and with adult protective services and state and federal agencies to effectively respond to and prosecute such cases.

Presenters:

April DeValkenaere, SBWCP, CFCI

State Bar of Wisconsin

Certified Paralegal, Certified Financial Crimes Investigator, White Collar Crime Certified Paralegal, Waukesha County District Attorney’s Office

Peter M. Tempelis, JD, MPA

Assistant District Attorney, Waukesha County District Attorney’s Office

A2. Ethical Issues in End-of-Life Decision-Making

This session will focus on several different end-of-life issues that may occur and how best to think through and address those issues.

Specific learning objectives include:

- Identifying five kinds of end-of-life issues of ethical concern.
- Describing the ethics of each of the identified end-of-life issues.
- Describing best practices for addressing these issues.

Presenter:

Thomas D. Harter, PhD

Director, Department of Bioethics and Humanities, Gundersen Health System



Wednesday, October 13

10:15–11:30 a.m. | “A” Breakout Sessions

A3. Partnering with the Ombudsman Program

This presentation will provide an overview of the Board on Aging and Long Term Care’s Ombudsman Program, and the potential partnership opportunities with adult protective services staff to enable a balance of older adult consumer safety and dignity of risk.

Presenter:

Kim Marheine

Ombudsman Services Supervisor, Wisconsin Board on Aging and Long Term Care

A4. Understanding the Mental Health Needs of an Aging Population

Older adults face several stressors that can make them susceptible to depression, anxiety, and suicide. Cognitive impairment and dementia can complicate the diagnosis and treatment of older adults. In this workshop, we will discuss approaches to assessing and addressing mental illness in older adults.

Presenter:

Art Walaszek, M.D.

Professor, Vice Chair for Education and Faculty Development, Department of Psychiatry; Co-Leader, Outreach, Recruitment and Education Core, Wisconsin Alzheimer’s Disease Research Center; Public Health Pillar Leader, Wisconsin Alzheimer’s Institute, University of Wisconsin School of Medicine and Public Health



Wednesday, October 13

11:30 a.m.–12:15 p.m. | Listening Session

Ask any questions you have about current county and tribal programs and service needs in this open-format question and answer session.

Facilitators:

Doreen A. Goetsch, CSW

Elder Abuse Victim Liaison Coordinator, Greater Wisconsin Agency on Aging Resources

Alice Page, JD, MPH

Adult Protective Services and Systems Developer, Bureau of Aging and Disability Resources,
Division of Public Health, Wisconsin Department of Health Services

Jayne Mullins

Older Americans Act Consultant, Greater Wisconsin Agency on Aging Resources

12:15–1 p.m. | Lunch break

1–2:15 p.m. | “B” Breakout Sessions

B1. IRIS and Adult Protective Services

This workshop will bring together a multi-disciplinary panel from the Division of Medicaid Services (DMS) IRIS Program, which oversees the IRIS contractors, IRIS consultant agencies, and adult protective services. Topics will include a review of:

- The IRIS program and self-direction.
- The roles and responsibilities of IRIS consultants and adult protective services, including how referrals are investigated and actions that can be taken to address the participants’ needs.
- How DMS, IRIS consultant agencies, and adult protective services work with each other to investigate referrals and/or to assess, plan, implement, and manage various supports and services to meet the needs of these individuals, who often have complex care needs.

Panel Facilitator:

Ann Lamberg

Deputy Director, Bureau of Quality and Oversight, Division of Medicaid Services,
Wisconsin Department of Health Services



Wednesday, October 13

B2. Ethics of Treatment Decision-Making for Persons without Capacity

At the conclusion of the session, attendees will be able to identify ethical best practices for helping vulnerable adults in Wisconsin who lack treatment decision-making capacity. They will learn the roles, responsibilities, and limits of surrogate decision-makers and how medical decisions are made when there is no known surrogate decision-maker.

Presenter:

Thomas D. Harter, PhD

Director, Department of Bioethics and Humanities, Gundersen Health System

B3. Substance Abuse and Suicide Risk in Older Adults

Explore the unique risk factors and screening tools to identify a potential substance use disorder and/or suicide risk in an older adult—with specific attention to self-neglect and safety evaluation in the setting of cognitive impairment. Learn evidence-based approaches to address these issues, including referral to targeted therapies as well as medical and legal interventions in the case of vulnerable older adults. Using the Wisconsin Star Method, this session addresses objectives in an interactive, case-based discussion format.

Presenter:

Melanie Scharrer, MD

Geriatric Psychiatrist, Assistant Professor, University of Wisconsin–Madison



Wednesday, October 13

1–2:15 p.m. | “B” Breakout Sessions

B4. Building Capacity for Behavioral Health and Wellness: Putting Crisis Innovation Incentive Awards Into Practice

The Crisis Innovation Incentive Awards were created to promote collaboration between county human service departments and long-term care stakeholders. The awards are a part of ongoing efforts by the Wisconsin Department of Health Services (DHS) to improve local crisis prevention and intervention responses and reduce the frequency and duration of stays at institutes for mental disease (IMDs). This panel involves presentations from two Crisis Innovation Incentive Award recipients. Program managers from the Vilas House/REM Wisconsin and the O’Rourke Dementia Stabilization Unit at the Pleasant View Nursing Home will provide an overview of the challenges and rewards of building local programs that provide direct care for individuals in need of crisis stabilization in a supportive setting.

Facilitator:

Donavon Schumacher

Western Region Human Services Area Coordinator, Wisconsin Department of Health Services
Vilas House/REM WI Project

Anneliese Skoda, BS, CSAC, ICS

Assistant Manager, Integrated Support and Recovery Services, La Crosse County Human Services

Melissa Klatt

Quality Improvement Manager, REM Wisconsin

Leah Gutknecht, LPC, CWP

Director of Behavioral Health, Inclusa, Inc.

Richard O’Rourke Dementia Stabilization Unit Project

Maria B. Johnson, APSW

Pleasant View Skilled Nursing and Rehab

Annie Yoveff

Community Health Specialist, Wisconsin Department of Health Services

2:15–2:30 p.m. | Wrap up, looking at tomorrow



Thursday, October 14

9–9:10 a.m. | Opening welcome

9:15–10:30 a.m. | “C” Breakout Sessions

C1. Agency Investigatory Roles and Responsibilities

This two-session, back-to-back workshop will bring together a multi-disciplinary panel from the Division of Quality Assurance (DQA), which regulates long-term care facilities and programs; the Bureau of Quality and Oversight in the Division of Medicaid Services (DMS), which oversees Family Care and IRIS; Brown County Adult Protective Services (APS); and the Long-Term Care Ombudsmen Program at the Board on Aging and Long Term Care. DQA will be represented by panelists from the Bureau of Nursing Home Resident Care, the Bureau of Assisted Living, and the Office of Caregiver Quality. Topics will include an in-depth review of:

- The general roles and responsibilities of each bureau, agency, or program—what they do and from what authority those roles and responsibilities derive.
- The unique roles and responsibilities of each bureau, agency, or program relative to referrals of abuse, neglect, self-neglect, or financial exploitation of older adults and younger adults with physical or cognitive disabilities.
- How these bureaus, agencies, and programs work with each other to investigate referrals and/or to assess, plan, implement, and manage various supports and services to meet the needs of these individuals, who often have complex care needs.

Panelists:

Sheldon Kroning

Supervisor IRIS Oversight, Bureau of Quality and Oversight, Division of Medicaid Services, Wisconsin Department of Health Services

Ann Angell, RN

Director, Bureau of Nursing Home Resident Care, Division of Quality Assurance, Wisconsin Department of Health Services

Kathy Lyons, BSHCA

Interim Director, Bureau of Assisted Living, Division of Quality Assurance, Wisconsin Department of Health Services

Davis A. Ciotola, JD

Director, Office of Caregiver Quality, Division of Quality Assurance, Wisconsin Department of Health Services

Ami D. Berndt, CSW

Case Worker, Brown County Adult Protective Services

Alice K. Page, JD, MPH

Adult Protective Services and Systems Developer, Bureau of Aging and Disability Resources, Division of Public Health, Wisconsin Department of Health Services

Doreen A. Goetsch, CSW

Elder Abuse Victim Liaison Coordinator, Greater Wisconsin Agency on Aging Resources

Kim Marheine

Ombudsman Services Supervisor, State of Wisconsin Board on Aging and Long Term Care



Thursday, October 14

9:15–10:30 a.m. | “C” Breakout Sessions

C2. Disability Rights Wisconsin’s Role as an Advocate

Disability Rights Wisconsin (DRW) is the designated protection and advocacy (P&A) agency for people with disabilities in Wisconsin. DRW is also an umbrella organization for several different advocacy projects designed to serve discreet populations of people with disabilities in Wisconsin. Among these projects are the Family Care and IRIS Ombudsman program, the SSI Managed Care External Advocacy program, and the Medicare Part D Helpline. We also have a Victim Advocacy program that permits us to assist people with disabilities who are also victims of crime. The P&A designation gives us special legal authority to investigate cases of abuse and neglect of people with disabilities and, when appropriate, act on their behalf. That expanded legal authority does not, however, come with unlimited resources to conduct investigations on behalf of individuals. This workshop will help APS staff better understand the legal authority DRW has as the P&A and the circumstances under which we are likely to use it.

Presenter:

Mitchell Hagopian, JD
Managing Attorney, Disability Rights Wisconsin

C3. Collective Trauma

Even before the COVID-19 pandemic, trauma was widely prevalent in our society. The collective trauma we are all experiencing now as the result of this pandemic has only exacerbated the issue. Moreover, trauma has negatively affected organizations, taxing already stressed systems of care and practitioner wellness. This presentation will explore the many faces of trauma and its prevalence in society. We will discuss moral injury and what it looks like as well as ideas on how to heal from moral injury. Never before has this topic been more relevant and needed to serve each other and those depending on us for help. Objectives include:

- Reviewing key terminology and concepts related to trauma and moral injury.
- Increasing awareness of how past trauma and current collective trauma affects a helper’s engagement, health, and productivity.
- Increasing understanding of the ways one can perform self-care and heal from moral injury.

Presenter:

Scott A. Webb, MS
Trauma-Informed Care Coordinator, Wisconsin Department of Health Services

C4. Spendthrift Guardianships and Protecting Elders at Risk from Financial Exploitation

The world of financial exploitation continues to grow, and our understanding of options to protect elders at risk needs to grow with it. Learn about additional techniques and strategies to assist elders in the community, including using a Petition for Guardianship of the Spendthrift. Understand what you will want to look for in your investigation to be prepared for questions from both the petitioner and the defense.

Presenter:

Jessica M. Moeller, JD
Professor, Criminal Justice Department Head, Wisconsin Lutheran College



Thursday, October 14

10:45 a.m.–12 p.m. | “D” Breakout Sessions

D1. Agency Investigatory Roles and Responsibilities, continued

D2. Providing Inclusive Services to LGBTQ+ People

This workshop provides a deeper understanding of LGBTQ+ health disparities and providers’ roles in mitigating the harm to LGBTQ+ people in health care and other therapeutic spaces. It also provides basic strategies for creating spaces that are safe and inclusive of all identities.

Presenter:

Katie Hamm, MSW
Consultant, Diverse and Resilient

D3. It’s Complicated: Rediscovering the Relationship between Ch. 51 and Ch. 55

Two pleasantly perplexing partners, Ch. 51 (A. Lessard) and Ch. 55 (P. Watts), are in a long-term relationship and are at a crossroads when the friend who first set them up points out their flaws and suggests they are too different to make it work. Hoping to find their way again, they embark on a journey in the wilderness to rediscover their relationship as they explore the landscape around them. After a storm disorients them, they are forced to confront their flaws and differences if they are going to make it out alive. After remembering their history and the lessons learned, can they find that maybe it isn’t so complicated after all?

Presenter:

Peter Navis, JD
Judicial Court Commissioner, Walworth County

D4. Totality of the Circumstances

Many factors play into investigations, and the compilation of these facts—also known as the totality of the circumstances—provides the “picture” needed for successful investigations and prosecutions. Like everyone, law enforcement officers don’t know what they don’t know. Take a peek into what law enforcement needs from APS to build a criminal financial exploitation case.

Presenter:

Loreen Glaman
Special Agent, Division of Criminal Investigation, Wisconsin Department of Justice

12–12:45 p.m. | Lunch break



Thursday, October 14

12:45–2:30 p.m. | Closing Session



Greg Van Rybroek, Ph.D., J.D.

Director, Mendota Mental Health Institute

Happiness is Slippery

Happiness is elusive. It is difficult to contemplate. There are no magic answers. There would be little reason for a talk like this if one answer fit for all. The point is, it is hard to meaningfully define what personal happiness actually is, but most of us would vote for having whatever-it-is since the word connotes something positive and desirable. While happiness may be slippery, understanding what it is personally is worthy of inspection. The only possible value of this talk is to stimulate deep self-reflection about what it is in our own lives. Don't worry; no personal self-reflections will be solicited. Instead, we'll tour what is known about the topic of happiness and be left hanging to reflect on what any of it means personally. The question might be: "If I cannot capture my own happiness, what is in the way?"

2:30 - 2:45 pm | Wrap up and adjourn



Friday, October 15

8 a.m.–12:30 p.m. | Social Work Ethics and Boundaries

The four hours will comprise four lectures:

1. Ethics: Practicing from a Social Justice Perspective (45 minutes)
2. Social Work Boundaries (1.25 hours)
(15 minute break)
3. Ethics in Communication: Delivering Bad News (1.25 hours)
4. Resilience, Self-Care, and Living Well as a Caregiver (45 minutes)

Instructor:

Jennifer J. Lang, MSW, APSW

Ethics: Practicing from a Social Justice Perspective

It is no secret that 2020 was a year that uprooted life as usual, from the COVID-19 pandemic, to the Black Lives Matter movement, concerns about law enforcement misuse of force, and the right to protest. These major events influenced not only our lives, but the lives of those we serve, the organizations we work for, and the communities we live in. At the forefront of all these events was the topic of social justice.

At the conclusion of this presentation, attendees will be able to:

- Describe the ethical responsibility of social justice as a social worker and case manager.
- Apply a social justice perspective to practice—advocating access to goods, opportunities, and fair treatment; encouraging voice; and promoting safety.

Social Work Boundaries

Professional boundaries are a set of guidelines, expectations, and rules that set limits for safe, acceptable, and effective care by workers. Boundaries influence our relationships with clients, families, colleagues, and students. Much of the literature on boundaries relates to clinical or therapeutic relationships; however, all social work settings offer the opportunities for boundary concerns, crossings, or violations. The objectives for this lecture are to:

- Review National Association of Social Workers NASW Code of Ethics standards that guide professional relationships.
- Discuss NASW standards for technology and social media published with the 2018 Code of Ethics.
- Review WI Administrative Code MPSW 20 on conduct.
- Define and give examples of boundary crossing, boundary violation, and management of broken boundaries.
- Review boundary scenarios and apply NASW standards.



Friday, October 15

8 a.m.–12:30 p.m. | Social Work Ethics and Boundaries

Ethics in Communication: Delivering Bad News

Social workers who work in health care and mental health care are often faced with delivering bad news to clients and families. Bad news could be a diagnosis, a change in disease progression, an inability to return to home, or any news that alters one's perception or plans for the future. This presentation will share communication skills, techniques, and approaches to working with clients and families during difficult life-changing events. The social work values, ethics, and boundaries relative to importance of communication skills will be discussed. The objectives for this lecture are to:

- Provide examples of communication skills to develop rapport with families.
- Offer techniques to foster communication that is empathetic, honest, and understandable when delivering bad news.
- Review social work values, ethics, and boundaries relative to effective and empathetic communication.
- Discuss how to respond with sensitivity to a variety of emotional reactions and questions.

Resilience, Self-Care, and Living Well as a Caregiver

Social workers have rewarding but tough jobs. Daily, social workers witness life-changing events, mental and physical illness, and trauma. Delivering life-changing news can also take a toll on the practitioner, so it is essential practitioners take care of themselves. Social workers are not immune to reacting to the demands of their work, so in order to foster living and working well, we need to maintain resilience. The objectives for this lecture are to:

- Discuss debriefing and concerns that may indicate a need to debrief.
- Review NASW ethical standard on impairment.
- Examine the ethics and boundary considerations to the use of self-disclosure in practice.
- Discuss ways to build and maintain resilience.
- Review the NASW statement on self-care.
- Review and take inventory on our own self-care and resiliency practices.



Registration Information

Registration Fee:

Full Conference | \$99

Registration Deadline: **October 8, 2021**

Register Online: [APS Conference Registration](#)

The 2021 Wisconsin Adult Protective Services Conference is seeking approval for a total of 11.50 CEHs from the National Association of Social Workers, Wisconsin Chapter. A link will be provided for registrants to receive a printable, personalized CEH Certificate of Completion.

CEHs are earned if you participate in the live sessions. Attendance in the live sessions is recorded. You are not be able to earn CEHs by watching recorded sessions.

Continuing Education Hours are a measure of participation in continuing education programs. Individuals should consult with their professional association and/or licensing board regarding the applicability of the conference for their profession. It is the individual's responsibility to report CEHs earned to their appropriate credential or licensing board.

Conference Cancellation Policy:

If notice of cancellation is received prior to the registration deadline, you will receive a full refund of fees. No refunds will be made for cancellations received after the deadline date. A substitute may attend in your place.