



Date: April 13, 2023

DPH Numbered Memo BADR 2023-01

To: Aging and Disability Resource Center (ADRC) Directors
Tribal Aging and Disability Resource Specialists (ADRS)

From: Tom Balsley, Director
Office for Resource Center Development
Bureau of Aging and Disability Resources

Changes to Policy and Procedures Effective May 1, 2023, for Aging and Disability Resource Centers and Tribal Aging and Disability Resource Specialists

The COVID-19 public health emergency (PHE), first issued by the federal government on Jan. 27, 2020, and renewed every 90 days since, is set to expire on May 11, 2023. The Consolidated Appropriations Act legislation has decoupled Medicaid continuous eligibility from the PHE and has prompted the unwinding process. This memo addresses ensuing changes to policy and procedures issued by the Office for Resource Center Development (ORCD) through [Division of Public Health \(DPH\) Numbered Memo BADR 2022-02](#) that allowed for the modification of ADRC and Tribal ADRS service delivery in response to the COVID-19 pandemic and ongoing public health emergency.

Effective May 1, 2023, the modifications in service delivery that were previously allowed will revert to what is written in each agency's contract with the state. Aging and disability resource centers (ADRCs) and Tribal aging and disability resource specialists (ADRSs) should refer to their 2023 [scope of services](#) and the [Operations Manual \(P-03062\)](#) for detailed guidance on expectations for performance standards. We still encourage ADRCs and Tribal ADRSs to work in close consultation with local public health departments, local corporation counsels, and other local authorities to ensure their agency's operational practices support the safety of customers and staff.

The following guidance is provided to address services where flexibilities related to the PHE are no longer available for ADRCs and Tribal ADRSs effective May 1, 2023:

- **Long-term care functional screen**
Updated guidance: ADRC and Tribal ADRSs are required to complete face-to-face long-term care functional screens. Instructions for requesting a waiver of the face-to-face contact requirement when completing a long-term care functional screen can be found in Section 11.2 of the [Wisconsin Long Term Care Functional Screen Instructions](#).

- **Enrollment and disenrollment forms**

Updated guidance: Verbal consent for enrollment and disenrollment forms is no longer allowed. Written signatures must be obtained through mail, DocuSign, or face-to-face visits with the customer. Updated forms will be available in SharePoint as of May 1, 2023

- **Walk-in visitors**

Updated guidance: ADRCs may no longer limit their provision of in-person services for walk-in visitors.

- **Information and assistance (I&A)**

Updated guidance: ADRCs and Tribal ADRSs must offer in-person options for I&A service delivery in addition to remote options, such as telephonic and virtual modes of communication, based on customer preference. Refer to the [Information and Assistance chapter of the ADRC Operations Manual \(P-03061-01\)](#) for additional information.

- **Options counseling**

Updated guidance: ADRCs and Tribal ADRSs must offer in-person options for face-to-face visits as part of the options counseling process. Remote options, such as telephonic and virtual modes of communication, may occur based on customer preference. Refer to the [Options Counseling chapter of the ADRC Operations Manual \(P-03062-02\)](#) for additional information.

- **Benefit specialists and dementia care specialists**

Updated guidance: Disability benefit specialist, elder benefit specialist, and dementia care specialist activities must offer in-person options for service delivery in addition to remote options, such as telephonic and virtual modes of communication, based on customer preference. Refer to the [Disability Benefit Counseling \(P-03062-05a\)](#), [Elder Benefit Specialist Program \(P-03062-05b\)](#), and [Benefit Specialist Programs \(P-03062-05\)](#) chapters of the ADRC Operations Manual for additional information related to benefit specialists.

- **Memory screening**

Updated guidance: Memory screens should be offered in-person. Memory screens may also be offered virtually or telephonically, based on customer request. Memory screens provided virtually or telephonically should replace the clock draw of the mini-cog tool with the Attention section of the MoCA—BLIND assessment. Refer to the [Memory Screening in the Community Manual \(P-01622\)](#) for additional information.

The [Public Health Emergency Unwinding and Disenrollment Counseling Training](#), held on Feb. 22, 2023, provided further information about the unwinding process, timeline, resuming disenrollment counseling by ADRCs and Tribal ADRSs, and resuming ADRC requirements.

Questions

If your ADRC or Tribal ADRS agency has questions or concerns about this guidance, please contact your assigned [regional quality specialist](#).