AGING AND DISABILITY RESOURCE CENTER (ADRC) SPECIALIST ORIENTATION GUIDE

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| ADRC Specialist Supervisor | Phone Number | Email |
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| Functional Screen Lead | Phone Number | Email |
|       |       |       |
| Client Tracking Database Lead | Phone Number | Email |
|       |       |       |
| Other Lead(s)  | Phone Number | Email |
|       |       |       |

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| **Topic** | **Supporting Documentation/Links** | **Completion Date** |
| **General ADRC Orientation** | [ ]  Review [ADRC/Aging/Tribal User System Access Request Instructions](https://www.dhs.wisconsin.gov/forms/f02000a.pdf) (F‑02000a)[ ]  Complete the [ADRC/Aging/Tribal User system Access Request Form](https://www.dhs.wisconsin.gov/forms/f02000.docx) (F‑02000) and [User Agreement for System Access](https://www.dhs.wisconsin.gov/library/collection/f-00044) (F-00044) with your supervisorComplete these courses in the [Learning Management System](https://eri.litmos.com/account/login) (LMS):[ ]  ADRC Orientation course [ ]  ADRC Specialists Initial Training course [ ]  Identifying and Responding to Conflicts of Interest courseAdditional Resources:[ ]  [ADRCs in Wisconsin by County Map](https://www.dhs.wisconsin.gov/publications/p02356.pdf) (P-02356)[ ]  [Abbreviations, Acronyms, and Definitions](https://www.dhs.wisconsin.gov/publications/p03062-20.pdf) (P-03062-20) |       |
| **ADRC/Aging SharePoint** | [ ]  Upon receiving access, save the [ADRC/Aging SharePoint](https://share.health.wisconsin.gov/ltc/teams/ADRC/SitePages/Home.aspx) site to your web browserReview:[ ]  [Navigating SharePoint](https://vimeo.com/showcase/8460518/video/619964970) (Vimeo – 15 min.)[ ]  [Operations Manual Training Video](https://vimeo.com/showcase/8460518/video/667965206) (Vimeo – 32 min.)[ ]  [ADRC Specialist and Tribal ADRS News](https://share.health.wisconsin.gov/ltc/teams/ADRC/Lists/ADRC%20Specialist%20and%20Tribal%20ADRS%20News/AllItems.aspx) (SharePoint)[ ]  [Setting a SharePoint email alert](https://share.health.wisconsin.gov/ltc/teams/ADRC/ADRC%20Document%20Library/Sharepoint%20Setting%20an%20Email%20Alert.pdf#search=setting%20a%20SharePoint%20alert) (SharePoint)Additional Resources:[ ]  [Training Page](https://share.health.wisconsin.gov/ltc/teams/ADRC/SitePages/Training.aspx) (SharePoint)[ ]  [Calendar](https://share.health.wisconsin.gov/ltc/teams/ADRC/Lists/ADRC%20Training%20Calendar/calendar.aspx) (SharePoint)[ ]  [ADRC Directory](https://share.health.wisconsin.gov/ltc/teams/ADRC/Lists/ADRC%20Directory_1/All.aspx) (SharePoint) |       |
| **ADRC Scope of Services** | Review:[ ]  [ADRC Scope of Services](https://share.health.wisconsin.gov/ltc/teams/ADRC/SitePages/ADRC%20Scope%20of%20Services.aspx) (SharePoint) |       |
| **Statewide Policies** | Review:[ ]  [Required Statewide Policies](https://www.dhs.wisconsin.gov/library/p-02923.htm) (P-02923)[ ]  ADRC Confidentiality Policy and Procedure[ ]  ADRC Customer and Staff Rights and Responsibilities[ ]  Appeal Policy for Adverse Benefit Determinations[ ]  Complaint and Grievance [ ]  Conflict of Interest[ ]  Follow-Up[ ]  Service Limitation and Termination[ ]  Short-Term Service Coordination |       |
| **Time and Task Reporting** | Complete this course in the [Learning Management System](https://eri.litmos.com/account/login) (LMS):[ ]  Time and Task Reporting for General ADRC Staff (ADRC Orientation)Review Operations Manual:[ ]  [Time and Task Reporting](https://share.health.wisconsin.gov/ltc/teams/ADRC/SitePages/Manual/TimeAndTaskReporting.aspx) (SharePoint version) or [P-03062-10](https://www.dhs.wisconsin.gov/publications/p03062-10.pdf) (PDF version)Additional Resources:[ ]  [Time and Task Workbook](https://share.health.wisconsin.gov/ltc/teams/ADRC/SitePages/DailyTimeAndTask.aspx) (SharePoint)[ ]  [Time Reporting Trainings](https://share.health.wisconsin.gov/ltc/teams/ADRC/SitePages/Training.aspx#TR) (SharePoint)[ ]  [Time and Task Reporting Quick Links](https://share.health.wisconsin.gov/ltc/teams/ADRC/SitePages/QuickLinks.aspx#tr) (SharePoint) |       |
| **Information and Assistance** | Complete this course in the [Learning Management System](https://eri.litmos.com/account/login) (LMS):[ ]  Information and Assistance (ADRC Orientation and ADRC Specialist Initial Training)Review Operations Manual:[ ]  [Information and Assistance](https://share.health.wisconsin.gov/ltc/teams/ADRC/SitePages/Manual/Information%20and%20Assistance.aspx) (SharePoint version) or [P-03062-01](https://www.dhs.wisconsin.gov/publications/p03062-01.pdf) (PDF version)Additional Resources:[ ]  [Information and Assistance Quick Links](https://share.health.wisconsin.gov/ltc/teams/ADRC/SitePages/QuickLinks.aspx#ia) (SharePoint) |       |
| **Options Counseling** | Complete these courses in the [Learning Management System](https://eri.litmos.com/account/login) (LMS):[ ]  Options Counseling Standards Modules 1-4[ ]  Motivational InterviewingReview Operations Manual:[ ]  [Options Counseling](https://share.health.wisconsin.gov/ltc/teams/ADRC/SitePages/Manual/Options%20Counseling.aspx) (SharePoint version) or [P-03062-02](https://www.dhs.wisconsin.gov/publications/p03062-02.pdf) (PDF version)Additional Resources:[ ]  [Options Counseling Quick Links](https://share.health.wisconsin.gov/ltc/teams/ADRC/SitePages/QuickLinks.aspx#oc) (SharePoint) |       |
| **Nursing Home Transitions, MDS‑Q, Diversions, and Closures** | Complete this course in the [Learning Management System](https://eri.litmos.com/account/login) (LMS):[ ]  MDS-Q Training (ADRC Specialist Initial Training)[ ]  [MDS-Q Training Slides](https://share.health.wisconsin.gov/ltc/teams/ADRC/TemporaryDocuments/Final%202022%20Official%20Edited%20MDS-Q%20Training%20PowerPoint%20DQA.ADRC.pdf) (PDF version)Review Operations Manual:[ ]  [MDS-Q and Nursing Home Transitions](https://share.health.wisconsin.gov/ltc/teams/ADRC/SitePages/Manual/MDSQNursingHomeTransitions.aspx) (SharePoint version) or [P-03062-02a](https://www.dhs.wisconsin.gov/publications/p03062-02a.pdf) (PDF version)Additional Resources:[ ]  [MDS-Q and Nursing Home Transitions Quick Links](https://share.health.wisconsin.gov/ltc/teams/ADRC/SitePages/QuickLinks.aspx#NH) (SharePoint) |       |
| **Publicly Funded Long-Term Care** | Complete these courses in the [Learning Management System](https://eri.litmos.com/account/login) (LMS):[ ]  Long-Term Care Functional Screen (ADRC Orientation)[ ]  Enrollment and Disenrollment Counseling (ADRC Orientation and ADRC Specialist Initial Training)[ ]  Medicaid (ADRC Specialist Initial Training)[ ]  Access and CARES Worker Web Query Only (ADRC Specialist Initial Training)Review Operations Manual:[ ]  [Publicly Funded Long-Term Care](https://share.health.wisconsin.gov/ltc/teams/ADRC/SitePages/Manual/Publicly%20Funded%20Long-Term%20Care.aspx) (SharePoint version) or [P‑03062‑03](https://www.dhs.wisconsin.gov/publications/p03062-03.pdf) (PDF version)[ ]  [Enrollment Counseling](https://share.health.wisconsin.gov/ltc/teams/ADRC/SitePages/Manual/Enrollment%20Counseling.aspx) (SharePoint version) or [P‑03062‑03a](https://www.dhs.wisconsin.gov/publications/p03062-03a.pdf) (PDF version)[ ]  [Disenrollment Counseling](https://share.health.wisconsin.gov/ltc/teams/ADRC/SitePages/Manual/Disenrollment%20Counseling.aspx) (SharePoint version) or [P‑03062‑03b](https://www.dhs.wisconsin.gov/publications/p03062-03b.pdf) (PDF version)[ ]  [Eligibility Determination](https://share.health.wisconsin.gov/ltc/teams/ADRC/SitePages/Manual/Eligibility%20Determination.aspx) (SharePoint version) or [P‑03062‑04](https://www.dhs.wisconsin.gov/publications/p03062-04.pdf) (PDF version)[ ]  [Long-Term Care Functional Screen](https://share.health.wisconsin.gov/ltc/teams/ADRC/SitePages/Manual/Long-Term%20Care%20Functional%20Screen.aspx) (SharePoint version) or [P-03062-4a](https://www.dhs.wisconsin.gov/publications/p03062-4a.pdf) (PDF version)[ ]  [Financial Eligibility and General Medicaid](https://share.health.wisconsin.gov/ltc/teams/ADRC/SitePages/Manual/FinancialEligibilityandGeneralMedicaid.aspx) (SharePoint version) or [P‑03062-04b](https://www.dhs.wisconsin.gov/publications/p03062-04b.pdf) (PDF version)Additional Resources:[ ]  [Publicly Funded Long-Term Care Quick Links](https://share.health.wisconsin.gov/ltc/teams/ADRC/SitePages/QuickLinks.aspx#pfLTC) (SharePoint)[ ]  [Enrollment Counseling Quick Links](https://share.health.wisconsin.gov/ltc/teams/ADRC/SitePages/QuickLinks.aspx#enroll) (SharePoint)[ ]  [Disenrollment Counseling Quick Links](https://share.health.wisconsin.gov/ltc/teams/ADRC/SitePages/QuickLinks.aspx#disenroll) (SharePoint)[ ]  [Long-Term Care Functional Screen Quick Links](https://share.health.wisconsin.gov/ltc/teams/ADRC/SitePages/QuickLinks.aspx#ltcfs) (SharePoint)[ ]  [Financial Eligibility and General Medicaid Quick Links](https://share.health.wisconsin.gov/ltc/teams/ADRC/SitePages/QuickLinks.aspx#fegm) (SharePoint) |       |
| **Equipment, Technology, and Systems** | Complete this course in the [Learning Management System](https://eri.litmos.com/account/login) (LMS):[ ]  Client Tracking (ADRC Specialists Initial Training)Review Operations Manual:[ ]  [Equipment, Technology, and Systems](https://share.health.wisconsin.gov/ltc/teams/ADRC/SitePages/Manual/EquipmentTechnologyAndSystems.aspx) (SharePoint version) or [P‑03062‑14](https://www.dhs.wisconsin.gov/publications/p03062-14.pdf) (PDF version)[ ]  [Client Tracking](https://share.health.wisconsin.gov/ltc/teams/ADRC/SitePages/Manual/ClientTracking.aspx) (SharePoint version) or [P-03062-09](https://www.dhs.wisconsin.gov/publications/p03062-09.pdf) (PDF version)Additional Resources:[ ]  [Equipment, Technology, and Systems Quick Links](https://share.health.wisconsin.gov/ltc/teams/ADRC/SitePages/QuickLinks.aspx#ets) (SharePoint)[ ]  [Client Tracking Quick Links](https://share.health.wisconsin.gov/ltc/teams/ADRC/SitePages/QuickLinks.aspx#ct) (SharePoint) |       |
| **Benefit Specialist Programs** | Complete this course in the [Learning Management System](https://eri.litmos.com/account/login) (LMS):[ ]  Benefits Counseling (ADRC Orientation)Review Operations Manual:[ ]  [Benefit Specialist Programs](https://share.health.wisconsin.gov/ltc/teams/ADRC/SitePages/Manual/BenefitSpecialistPrograms.aspx) (SharePoint version) or [P-03062-05](https://www.dhs.wisconsin.gov/publications/p03062-05.pdf) (PDF version)[ ]  [Disability Benefit Specialist Program](https://share.health.wisconsin.gov/ltc/teams/ADRC/SitePages/Manual/DisabilityBenefitCounseling.aspx) (SharePoint version) or [P-03062-05A](https://www.dhs.wisconsin.gov/publications/p03062-05a.pdf) (PDF version)[ ]  [Elder Benefit Specialist Program](https://www.dhs.wisconsin.gov/publications/p03062-05b.pdf) (P-03062-05B PDF version only) |       |
| **Dementia Care Specialist Program** | Complete this course in the [Learning Management System](https://eri.litmos.com/account/login) (LMS):[ ]  Dementia System of Wisconsin (ADRC Orientation)Review Operations Manual:[ ]  [Dementia Care Specialist Program](https://share.health.wisconsin.gov/ltc/teams/ADRC/SitePages/Manual/DementiaCareSpecialist.aspx) (SharePoint version) or [P-03062-07](https://www.dhs.wisconsin.gov/publications/p03062-07.pdf) (PDF version)Additional Resources:[ ]  [Dementia Care Specialist Quick Links](https://share.health.wisconsin.gov/ltc/teams/ADRC/SitePages/QuickLinks.aspx#dcs) (SharePoint) |       |
| **Health Equity and Advocacy** | Review:[ ]  [Health Equity and Social Determinants of Health](https://vimeo.com/showcase/8460518/video/545980172) (Vimeo – 1 hr. 10 min.)[ ]  [Gender Equity Training](https://vimeo.com/showcase/8460518/video/664970001) (Vimeo – 53 min.)[ ]  [Health Equity Through The Tribal Experience](https://vimeo.com/showcase/8460518/video/545980070) (Vimeo – 1 hr. 50 min.)Complete these courses in the [Learning Management System](https://eri.litmos.com/account/login) (LMS):[ ]  Ombudsman Programs (ADRC Specialist Initial Training – Foundational Topics)[ ]  Protection and Advocacy (ADRC Specialist Initial Training – Customer Service and Person-Centered Practice)Review Operations Manual:[ ]  [Health Equity](https://share.health.wisconsin.gov/ltc/teams/ADRC/SitePages/Manual/HealthEquity.aspx) (SharePoint version) or [P-03062-19](https://www.dhs.wisconsin.gov/publications/p03062-19.pdf) (PDF version)[ ]  [Advocacy](https://share.health.wisconsin.gov/ltc/teams/ADRC/SitePages/Manual/Advocacy.aspx) (SharePoint version) or [P-03062-18](https://www.dhs.wisconsin.gov/publications/p03062-18.pdf) (PDF version)Additional Resources:[ ]  [Health Equity Quick Links](https://share.health.wisconsin.gov/ltc/teams/ADRC/SitePages/QuickLinks.aspx%22%20%5Cl%20%22he) (SharePoint)[ ]  [Advocacy Quick Links](https://share.health.wisconsin.gov/ltc/teams/ADRC/SitePages/QuickLinks.aspx#advocacy) (SharePoint) |       |
| **Marketing, Outreach, and Public Education** | Review Operations Manual: [ ]  [Marketing, Outreach and Public Education](https://share.health.wisconsin.gov/ltc/teams/ADRC/SitePages/Manual/MarketingOutreachandPublicEducation.aspx) (SharePoint version) or [P-03062-08](https://www.dhs.wisconsin.gov/publications/p03062-08.pdf) (PDF version)Additional Resources:[ ]  [Marketing, Outreach, and Public Education Quick Links](https://share.health.wisconsin.gov/ltc/teams/ADRC/SitePages/QuickLinks.aspx#marketing) (SharePoint) |       |
| **Site visits to Community Providers/Resource Agencies** | To become more familiar with resources and providers within the community, it is recommended that ADRC Specialists complete site visits. This is a list of suggested providers/resources to visit, but each ADRC can determine which specific visits would have the most value for a new ADRC Specialist:[ ]  Adult Day Centers [ ]  Assisted Living Facilities/Residential Care Providers[ ]  Behavioral Health Providers [ ]  DVR/Employment Service Providers[ ]  Housing – Emergency Shelters, Subsidized Complexes, Independent Senior Complexes[ ]  Independent Living Center[ ]  Loan Closets[ ]  Nursing Homes[ ]  Senior Centers[ ]  Senior Dining Sites |       |
| **Shadowing/ Observation*** Calls with Customers
* In-person Customer Contacts
* Options Counseling
* LTCFS
* Enrollment & Disenrollment Counseling
 | Process steps for shadowing/observing: [ ]  Shadow customer contacts, and debrief with designated staff afterwards[ ]  Conduct customer contacts while supervisor/designed staff observes, and debrief with supervisor/designated staff after[ ]  Conduct customer contacts independently [ ]  Ongoing check-ins with supervisor |       |
| **Additional Resources** | [ ]  [Regional Quality Specialists ADRC Assignment Map](https://www.dhs.wisconsin.gov/publications/p02603.pdf) (P-02603)[ ]  [Office for Resource Center Development Staff Directory](https://www.dhs.wisconsin.gov/adrc/pros/staff.htm) (DHS)[ ]  [History of Aging & ADRCs](https://share.health.wisconsin.gov/ltc/teams/ADRC/SitePages/Manual/History%20of%20Aging%20%26%20ADRCs.aspx) (SharePoint) |       |