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 |
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| Client Tracking Database Lead | Phone Number | Email |
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| 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 supervisor  Complete 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 course  Additional 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 browser  Review:  [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 Interviewing  Review 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" \l "he) (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&%20ADRCs.aspx) (SharePoint) |  |