AGING AND DISABILITY RESOURCE CENTER (ADRC)   
DIRECTOR/MANAGER ORIENTATION GUIDE

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| Office of Resource Center Development (ORCD) [Regional Quality Specialist (RQS) Contact Name](https://www.dhs.wisconsin.gov/adrc/pros/staff.htm) | Phone Number | Email |
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| Aging and Disability Resource Center Mentor Name | Phone Number | Email |
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| **Topic** | **Supporting Documentation/Links** | **Completion Date** |
| **Welcome and Orientation to the Office for Resource Center Development (ORCD)** | Review:  [Introduction to the Aging and Disability Network](https://share.health.wisconsin.gov/ltc/teams/ADRC/SitePages/Training.aspx#Director) (New Director Orientation Webinar – 1 hr. 38 min.)  Review [ADRC/Aging/Tribal User System Access Request Instructions](https://www.dhs.wisconsin.gov/forms/f02000a.pdf) (F‑02000a)  Complete and submit [ADRC/Aging/Tribal User system Access Request Form](https://www.dhs.wisconsin.gov/forms/f02000.docx) (F-02000)  Complete these courses in the [Learning Management System](https://eri.litmos.com/account/login?ReturnUrl=%2fhome%2fdashboard) (LMS):  ADRC Orientation course  Identifying and Responding to Conflicts of Interest course  Additional Resources:  [Abbreviations, Acronyms, and Definitions](https://www.dhs.wisconsin.gov/publications/p03062-20.pdf) (P-03062-20)  [ADRC Trainings Showcase](https://vimeo.com/showcase/8460518) (Vimeo)  [ADRCs in Wisconsin by County Map](https://www.dhs.wisconsin.gov/publications/p02356.pdf) (P-02356)  [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) |  |
| **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.)  [ADRC Operations Manual Demo Video](https://vimeo.com/showcase/8460518/video/667965206) (Vimeo – 32 min.)  [ADRC Announcements](https://share.health.wisconsin.gov/ltc/teams/ADRC/Lists/ADRC%20Announcements/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)  [How to View Staff Progress in the LMS](https://share.health.wisconsin.gov/ltc/teams/ADRC/ADRC%20Document%20Library/How%20to%20View%20Staff%20Progress%20in%20the%20Learning%20Management%20System_2024.03.11.pdf) (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 Informational Page](https://share.health.wisconsin.gov/ltc/teams/ADRC/SitePages/ADRCinfo/AllPages.aspx) (SharePoint)  [Special Funding Opportunities](https://share.health.wisconsin.gov/ltc/teams/ADRC/SitePages/Grants.aspx) (SharePoint)  [ARPA HCBS Projects for ADRCs and Tribes](https://share.health.wisconsin.gov/ltc/teams/ADRC/SitePages/ADRC_ARPA.aspx) (SharePoint) |  |
| **ADRC Scope of Services & Agency Information** | Review:  [Scope of Services Webinar](https://share.health.wisconsin.gov/ltc/teams/ADRC/SitePages/Training.aspx#Director) (New Director Orientation Webinar – 1 hr. 3 min.)  [ADRC Scope of Services](https://share.health.wisconsin.gov/ltc/teams/ADRC/SitePages/ADRC%20Scope%20of%20Services.aspx) (SharePoint)  Review Operations Manual:  [Organizational Structure](https://share.health.wisconsin.gov/ltc/teams/ADRC/SitePages/Manual/OrganizationalStructure.aspx) (SharePoint version) or [P-03062-12](https://www.dhs.wisconsin.gov/publications/p03062-12.pdf) (PDF version)  [Location and Physical Space](https://share.health.wisconsin.gov/ltc/teams/ADRC/SitePages/Manual/LocationAndPhysicalSpace.aspx) (SharePoint version) or [P-03062-13](https://www.dhs.wisconsin.gov/publications/p03062-13.pdf) (PDF version)  [Emergency Preparedness](https://share.health.wisconsin.gov/ltc/teams/ADRC/SitePages/Manual/EmergencyPreparedness.aspx) (SharePoint version) or [P-03062-18](https://www.dhs.wisconsin.gov/publications/p03062-18.pdf) (PDF version)  Additional Resources:  [Organizational Structure Quick Links](https://share.health.wisconsin.gov/ltc/teams/ADRC/SitePages/QuickLinks.aspx#os) (SharePoint)  [Physical Location Quick Links](https://share.health.wisconsin.gov/ltc/teams/ADRC/SitePages/QuickLinks.aspx#pl) (SharePoint)  [Emergency Preparedness Quick Links](https://share.health.wisconsin.gov/ltc/teams/ADRC/SitePages/QuickLinks.aspx#ep) (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  Establishing Public-Private Partnerships  Follow-Up  Service Limitation and Termination  Short-Term Service Coordination |  |
| **Funding and Fiscal** | Review:  [Funding/Fiscal Information](https://share.health.wisconsin.gov/ltc/teams/ADRC/SitePages/Training.aspx#Director) (New Director Orientation Webinar – 36 min.)  Review Operations Manual:  [Fiscal Management](https://share.health.wisconsin.gov/ltc/teams/ADRC/SitePages/Manual/Fiscal.aspx) (SharePoint version) or [P-03062-16](https://www.dhs.wisconsin.gov/publications/p03062-16.pdf) (PDF version)  Additional Resources:  [Adder Workbooks](https://share.health.wisconsin.gov/ltc/teams/ADRC/SitePages/AdderWorkbooks.aspx) (SharePoint)  [Fiscal Quick Links](https://share.health.wisconsin.gov/ltc/teams/ADRC/SitePages/QuickLinks.aspx#fiscal) (SharePoint) |  |
| **Time and Task Reporting** | Review:  [Medicaid Time & Task Reporting](https://share.health.wisconsin.gov/ltc/teams/ADRC/SitePages/Training.aspx#Director) (New Director Orientation Webinar – 32 min.)  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)  [Adder Workbook](https://share.health.wisconsin.gov/ltc/teams/ADRC/SitePages/AdderWorkbooks.aspx) (SharePoint)  [Time and Task Reporting Quick Links](https://share.health.wisconsin.gov/ltc/teams/ADRC/SitePages/QuickLinks.aspx#tr) (SharePoint)  Time and Task Reporting courses (ADRC Orientation) in the [Learning Management System](https://eri.litmos.com/account/login?ReturnUrl=%2fhome%2fdashboard) (LMS):  For General ADRC Staff  For Dementia Care Specialists  For Benefit Specialists |  |
| **Information and Assistance** | Review:  [Information and Assistance/Options Counseling](https://share.health.wisconsin.gov/ltc/teams/ADRC/SitePages/Training.aspx#Director) (New Director Orientation Webinar – 1 hr. 6 min.)  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)  Complete this course in the [Learning Management System](https://eri.litmos.com/account/login?ReturnUrl=%2fhome%2fdashboard) (LMS):  Information and Assistance Training – Parts 1 and 2 (ADRC Specialist Initial Training – Foundational Topics)  Additional Resources:  [Information and Assistance Quick Links](https://share.health.wisconsin.gov/ltc/teams/ADRC/SitePages/QuickLinks.aspx#ia) (SharePoint) |  |
| **Options Counseling** | 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)  Complete these courses in the [Learning Management System](https://eri.litmos.com/account/login?ReturnUrl=%2fhome%2fdashboard) (LMS):  Options Counseling Standards Modules 1, 5 and 6 (Options Counseling for Supervisors)  Motivational Interviewing  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** | 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)  [Nursing Home Referral Form](https://www.dhs.wisconsin.gov/forms/f00311.docx) (F-00311)  [MDS-Q Training: Resident Referrals to Community](https://vimeo.com/778639931/09b9899068) (Vimeo – 31 min.)  [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) |  |
| **Publicly Funded Long-Term Care** | Review:  [Access to Publicly Funded Long Term Care Programs and Services](https://share.health.wisconsin.gov/ltc/teams/ADRC/SitePages/Training.aspx#Director) (New Director Orientation Webinar – 54 min.)  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‑03062-04a](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)  Complete this course in the [Learning Management System](https://eri.litmos.com/account/login?ReturnUrl=%2fhome%2fdashboard) (LMS):  Enrollment Counseling – Part 1 and 2 (ADRC Specialist Initial Training – Foundational Topics)  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** | Review:  [Data & Systems](https://share.health.wisconsin.gov/ltc/teams/ADRC/SitePages/Training.aspx#Director) (New Director Orientation Webinar – 53 min.)  [Return on Investment for ADRCs](https://vimeo.com/showcase/8460518/video/583375555) (Vimeo – 12 min.)  [Return on Investment Calculator User Guide](https://apps.metastar.com/Apps40/NWDROI/Resources/ROI_UserGuide%20final.pdf) (MetaStar)  Contact the [ADRC Specialist Program Manager](mailto:mailtoChristine.See@dhs.wisconsin.gov) for access to the Calculator  [Return on Investment Calculator](https://apps.metastar.com/Apps40/NWDROI) (MetaStar)  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** | Review:  [Benefits Counseling Services](https://share.health.wisconsin.gov/ltc/teams/ADRC/SitePages/Training.aspx" \l "Director) (New Director Orientation Webinar – 35 min.)  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/p03062-06.pdf) (P-03062-05B PDF version only)  Additional Resources:  [Disability Benefit Specialist Program Quick Links](https://share.health.wisconsin.gov/ltc/teams/ADRC/SitePages/QuickLinks.aspx#dbs) (SharePoint)  [DBS SharePoint](https://share.health.wisconsin.gov/ltc/teams/dbs/SitePages/Home.aspx) (Must request access to this site via [F-02000](https://www.dhs.wisconsin.gov/forms/f02000.docx))  DBS orientation:  Part 1: [Welcome to the DBS Program](https://vimeo.com/showcase/8643735/video/662696093) (3 min.) [Transcript](https://share.health.wisconsin.gov/ltc/teams/dbs/Training/DBS%20Program%20Orientation%20Part%201%20%20-Welcome%20to%20the%20DBS%20Program%20Orientation%20Transcript.pdf)  Part 2: [Where Do I Fit in the Big Picture?](https://vimeo.com/showcase/8643735/video/662695905) (6 min.) [Transcript](https://share.health.wisconsin.gov/ltc/teams/dbs/Training/DBS%20Program%20Orientation%20Part%202%20%20-Where%20do%20I%20Fit%20into%20the%20Big%20Picture%20Transcript.pdf)  Part 3: [Where Do I Start?](https://vimeo.com/showcase/8643735/video/662695840)(7 min.) [Transcript](https://share.health.wisconsin.gov/ltc/teams/dbs/Training/DBS%20Program%20Orientation%20Part%203%20%20-Where%20do%20I%20Start%20Transcript.pdf)  Part 4: [How to be a DBS](https://vimeo.com/showcase/8643735/video/663371976)(24 min.) [Transcript](https://share.health.wisconsin.gov/ltc/teams/dbs/Training/DBS%20Program%20Orientation%20Part%204%20%20-How%20to%20be%20a%20DBS%20Transcript.pdf)  Part 5: [Who Does What?](https://vimeo.com/showcase/8643735/video/663372234)(16 min.) ​[Transcript](https://share.health.wisconsin.gov/ltc/teams/dbs/Training/DBS%20Program%20Orientation%20Part%205%20%20-Who%20Does%20What%20Transcript.pdf)  Elder Benefit Specialist Program Quick Links (SharePoint)  [EBS SharePoint](https://share.health.wisconsin.gov/ltc/teams/EBS/SitePages/Home.aspx) (Must request access to this site via [F-02000](https://www.dhs.wisconsin.gov/forms/f02000.docx)) |  |
| **Dementia Care Specialists Program** | Review:  [Dementia Services](https://share.health.wisconsin.gov/ltc/teams/ADRC/SitePages/Training.aspx#Director) (New Director Orientation Webinar – 1 hr. 7 min.)  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)  [DCS SharePoint](https://share.health.wisconsin.gov/ph/projects/DCS) (Must request access to this site via [F-02000](https://www.dhs.wisconsin.gov/forms/f02000.docx)) |  |
| **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 this course in the [Learning Management System](https://eri.litmos.com/account/login) (LMS):  Ombudsman Programs (ADRC Specialist Initial Training – Foundational Topics)  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#he) (SharePoint)  [Advocacy Quick Links](https://share.health.wisconsin.gov/ltc/teams/ADRC/SitePages/QuickLinks.aspx#advocacy) (SharePoint) |  |
| **Governing Board** | Review Operations Manual:  [Governing Boards, Commissions, and Committees](https://share.health.wisconsin.gov/ltc/teams/ADRC/SitePages/Manual/GoverningBoardsCommissionsAndCommittees.aspx) (SharePoint version) or [P-03062-15](https://www.dhs.wisconsin.gov/publications/p03062-15.pdf) (PDF version)  Additional Resources:  [Governing Boards, Committees, and Commissions Quick Links](https://share.health.wisconsin.gov/ltc/teams/ADRC/SitePages/QuickLinks.aspx#gb) (SharePoint) |  |

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| **Marketing, Outreach, and Public Education** | Review Operations Manual:  [Marketing, Outreach, and Public Information](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) |  |
| **Additional Resources** | Save these links:  [ADRC Professionals Page](https://www.dhs.wisconsin.gov/adrc/pros/index.htm) (DHS)  [DHS Forms Library](https://www.dhs.wisconsin.gov/forms/index.htm) (DHS)  [DHS Publications Library](https://www.dhs.wisconsin.gov/publications/index.htm) (DHS)  [History of Aging & ADRCs](https://share.health.wisconsin.gov/ltc/teams/ADRC/SitePages/Manual/History%20of%20Aging%20&%20ADRCs.aspx) (SharePoint) |  |