



## NEW ADRC DIRECTOR/MANAGER ORIENTATION PLAN

Office for Resource Center Development Contact Name	Phone Number	Email
Aging and Disability Resource Center Mentor Name	Phone Number	Email

	TOPIC	SUPPORTING DOCUMENTATION/LINKS	COMPLETE/PROVIDED?	DATE
1.	<b>Welcome and Orientation to the Office for Resource Center Development (ORCD)</b> <ul style="list-style-type: none"> <li>Who we are and What we do</li> <li>Regional Quality Specialist (RQS) Role</li> <li>Focus of the Orientation Binder and How to Use It</li> </ul>	<ul style="list-style-type: none"> <li>Welcome letter from ORCD Director</li> <li>ORCD Organizational Chart</li> <li><a href="#">ORCD Directory</a></li> <li><a href="#">RQS Assignment Map</a></li> <li><a href="#">RQS Contact Information</a></li> <li>ADRC Directory</li> <li>Orientation plan</li> <li>Orientation binder <i>(if applicable)</i></li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Welcome Letter</li> <li><input type="checkbox"/> ORCD Organizational Chart</li> <li><input type="checkbox"/> ORCD Directory</li> <li><input type="checkbox"/> RQS Assignment Map</li> <li><input type="checkbox"/> RQS Contact Information</li> <li><input type="checkbox"/> ADRC Directory</li> <li><input type="checkbox"/> Orientation plan</li> <li><input type="checkbox"/> Orientation binder <i>(if applicable)</i></li> </ul>	
2.	<b>History and Mission</b> <ul style="list-style-type: none"> <li>History and Mission</li> <li>ADRC Locations/Map</li> </ul>	<ul style="list-style-type: none"> <li><a href="#">ADRC Vision</a></li> <li><a href="#">What is an ADRC?</a></li> <li><a href="#">U.S. Government Recognition of ADRCs Press Release</a></li> <li><a href="#">1998 Family Care Proposal (pgs. 1-12)</a></li> <li><a href="#">ADRC Map</a></li> <li><a href="#">ADRC Expansion Map</a></li> <li>ADRC Fast Facts</li> <li>ADRC in a Nutshell</li> </ul> <p><b>To Review On Your Own:</b></p> <ul style="list-style-type: none"> <li><a href="#">Video: Introduction to ADRCs</a></li> <li><a href="#">Webcast: ADRC Mission and Philosophy</a></li> <li><a href="#">2011 Status Report</a></li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> ADRC Vision</li> <li><input type="checkbox"/> What is an ADRC?</li> <li><input type="checkbox"/> Press Release</li> <li><input type="checkbox"/> FC Proposal (pgs. 1-12)</li> <li><input type="checkbox"/> ADRC Map</li> <li><input type="checkbox"/> ADRC Expansion Map</li> <li><input type="checkbox"/> ADRC Fast Facts</li> <li><input type="checkbox"/> ADRC in a Nutshell</li> </ul> <ul style="list-style-type: none"> <li><input type="checkbox"/> Video: Intro to ADRCs</li> <li><input type="checkbox"/> Webcast: Mission/Philosophy</li> <li><input type="checkbox"/> 2011 Status Report</li> </ul>	

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3.	<b>Contract</b> <ul style="list-style-type: none"> <li>Contract Purpose</li> <li>Annual Documentation Requirements</li> </ul>	<ul style="list-style-type: none"> <li><a href="#">ADRC Contract</a></li> <li><a href="#">Request for Waiver of Education and Experience Requirements</a></li> <li><a href="#">Request for Waiver of Requirements Relating to Co-Location</a></li> <li><a href="#">Request for Waiver of Requirements Relating to Organizational Separation</a></li> <li><a href="#">Request for Waiver of the .5 Full-Time Equivalent Requirement</a></li> <li>Annual Documentation</li> </ul> <p><i>If Director starts in the Autumn:</i></p> <ul style="list-style-type: none"> <li>Summary of Proposed Contract Changes</li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> ADRC Contract</li> <li><input type="checkbox"/> Request for Waiver: Education and Experience</li> <li><input type="checkbox"/> Request for Waiver: Co-Location</li> <li><input type="checkbox"/> Request for Waiver: Organizational Separation</li> <li><input type="checkbox"/> Request for Waiver: .5 Full-Time Equivalent</li> <li><input type="checkbox"/> Annual Documentation</li> </ul> <p><i>If applicable:</i></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Summary of Proposed Contract Changes</li> </ul>	
4.	<b>Overview of Services</b> <ul style="list-style-type: none"> <li>Transitional Services</li> <li>Prevention and Early Intervention</li> <li>Short Term Service Coordination</li> <li>Access to Emergency Services</li> </ul> <p><i>* Information and Assistance, Options Counseling, Access to Public Funded LTC and Benefits Counseling are covered in separate sections.</i></p>	<ul style="list-style-type: none"> <li><a href="#">2011 Status Report (pgs. 4-6)</a></li> <li><a href="#">Living My Dream</a></li> <li><a href="#">Ensuring that Short-Term Service Coordination is Time Limited</a></li> <li><a href="#">Prevention and Early Intervention Plan</a></li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> 2011 Status Report (pgs. 4-6)</li> <li><input type="checkbox"/> Living My Dream</li> <li><input type="checkbox"/> Ensuring Short-Term Service Coordination</li> <li><input type="checkbox"/> Prevention/Early Intervention Plan</li> </ul>	
5.	<b>Funding/Fiscal Information</b> <ul style="list-style-type: none"> <li>Allocation and Funding Streams</li> <li>Appropriate Costs</li> </ul>	<ul style="list-style-type: none"> <li><a href="#">Info Bulletin #8: Info Materials Regarding Funding of ADRCs</a></li> <li><a href="#">Info Bulletin #11: Older Americans Act Funding and ADRCs</a></li> <li><a href="#">Info Bulletin #13: ADRC Cost Model Budgeting Tool</a></li> <li><a href="#">Info Bulletin #14: Financial Incentives in Support of Multi-County ADRCs</a></li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Info Bulletin #8</li> <li><input type="checkbox"/> Info Bulletin #11</li> <li><input type="checkbox"/> Info Bulletin #13</li> <li><input type="checkbox"/> Info Bulletin #14</li> </ul>	

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6.	<b>Medicaid Time Reporting</b> <ul style="list-style-type: none"> <li>Time Reporting Requirements</li> <li>Available Resources</li> <li>Time Reporting Effect on ADRC Budget</li> </ul>	<ul style="list-style-type: none"> <li>100% Time Reporting Tool</li> <li>100% Daily Activity Log</li> <li>100% Daily Activity Log for ADRC DCS Staff</li> <li>100% Daily Activity Log Summary</li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Time Reporting Tool</li> <li><input type="checkbox"/> Daily Activity Log</li> <li><input type="checkbox"/> Daily Activity Log for DCS</li> <li><input type="checkbox"/> Daily Activity Log Summary</li> </ul>	
7.	<b>Information &amp; Assistance and Options Counseling</b> <ul style="list-style-type: none"> <li>Unbiased Counseling</li> <li>Decision Support</li> <li>Home Visits</li> <li>Follow-Up</li> <li>Documentation</li> <li>Current Community Resources and Materials</li> <li>Coaching and Feedback</li> </ul>	<ul style="list-style-type: none"> <li><a href="#">I&amp;A Program Development and Implementation</a></li> <li><a href="#">Information &amp; Assistance Follow-Up Policy</a></li> <li><a href="#">Orientation Manual I&amp;A and Options Counseling</a></li> <li><a href="#">Options Counseling Initial Discovery Training Guide</a></li> <li><a href="#">Next Steps: My Planning Guide</a></li> <li><a href="#">Next Steps</a></li> <li><a href="#">Options Counseling Tip Card</a></li> <li><a href="#">Considering a Move? A Cost Calculator Can Help</a></li> <li><a href="#">Wisconsin AIRS</a></li> </ul> <p><b>To Review On Your Own:</b></p> <ul style="list-style-type: none"> <li>Webcasts/Online Modules <ul style="list-style-type: none"> <li><a href="#">Introduction to AT Kits for ADRCs</a></li> <li><a href="#">Introduction to Ombudsman Programs</a></li> <li><a href="#">Introduction to Legal Decision Making Tools</a></li> <li><a href="#">Dementia and Alzheimer's Disease</a></li> </ul> </li> <li><a href="#">Information and Assistance (Web Modules)</a> <ul style="list-style-type: none"> <li><a href="#">Introduction to Assisted Living</a></li> <li><a href="#">Introduction to Assistive Technology</a></li> <li><a href="#">Serving People Who are Blind or Visually Impaired</a></li> <li><a href="#">Supporting People with Developmental Disabilities</a></li> <li><a href="#">Supporting People with Physical Disabilities</a></li> <li><a href="#">Working with Older Adults</a></li> <li><a href="#">Intro to Medicare Part A and B</a></li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> I&amp;A Development and Implementation</li> <li><input type="checkbox"/> I&amp;A Follow-Up Policy</li> <li><input type="checkbox"/> Orientation Manual</li> <li><input type="checkbox"/> Training Guide</li> <li><input type="checkbox"/> Next Steps: My Planning Guide</li> <li><input type="checkbox"/> Next Steps</li> <li><input type="checkbox"/> Options Counseling Tip Card</li> <li><input type="checkbox"/> Cost Calculator</li> <li><input type="checkbox"/> Wisconsin AIRS</li> </ul> <ul style="list-style-type: none"> <li><input type="checkbox"/> Intro to AT Kits for ADRCs</li> <li><input type="checkbox"/> Intro to Ombudsman Programs</li> <li><input type="checkbox"/> Intro to Legal Decision Making Tools</li> <li><input type="checkbox"/> Dementia and Alzheimer's</li> </ul> <ul style="list-style-type: none"> <li><input type="checkbox"/> Intro to Assisted Living</li> <li><input type="checkbox"/> Intro to Assistive Technology</li> <li><input type="checkbox"/> Serving People Who are Blind or Visually Impaired</li> <li><input type="checkbox"/> Supporting People w/ DD</li> <li><input type="checkbox"/> Supporting People w/ PD</li> <li><input type="checkbox"/> Working With Older Adults</li> <li><input type="checkbox"/> Medicare Part A and B</li> <li><input type="checkbox"/> Medicare Part C and D</li> </ul>	

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		<ul style="list-style-type: none"> <li>• <a href="#">Intro to Medicare Part C and D</a></li> <li>• <a href="#">Intro to Medicare Cost Savings Plan</a></li> <li>• <a href="#">Motivational Interviewing Series</a> <ul style="list-style-type: none"> <li>• <a href="#">Session 1</a></li> <li>• <a href="#">Session 2</a></li> <li>• <a href="#">Session 3</a></li> <li>• <a href="#">Session 4</a></li> </ul> </li> <li>• <a href="#">Options Counseling Toolkit</a> <ul style="list-style-type: none"> <li>• <a href="#">Communication Module</a></li> </ul> </li> </ul>	<input type="checkbox"/> Medicare Cost Savings Plan  <input type="checkbox"/> Motivational Interviewing1 <input type="checkbox"/> Motivational Interviewing2 <input type="checkbox"/> Motivational Interviewing3 <input type="checkbox"/> Motivational Interviewing4  <input type="checkbox"/> Options Counseling Toolkit <input type="checkbox"/> Communication Module	
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8.	<b>Enrollment/Disenrollment Counseling</b> <ul style="list-style-type: none"> <li>• <i>Enrollment Counseling</i></li> <li>• <i>Disenrollment Counseling</i></li> <li>• <i>Interactions with MCOs and ICAs</i></li> </ul>	<b>Long Term Care Programs</b> <ul style="list-style-type: none"> <li>• <a href="#">Webcast: Intro to LTC Enrollment Counseling</a></li> <li>• <a href="#">Video: Enrollment Counseling: A Focus on Family Care and IRIS</a></li> <li>• <a href="#">Video: Enrollment Counseling: Family Care, Partnership, PACE and IRIS</a></li> <li>• <a href="#">Video: Enrollment Counseling: Family Care, Partnership and IRIS</a></li> <li>• <a href="#">Enrollment Counseling Publications</a></li> </ul> <b>Access/Enrollment Evaluation</b> <ul style="list-style-type: none"> <li>• <a href="#">Access and Enrollment Evaluation Report</a></li> <li>• Power Point: From Research to Practice: How to Deliver the Best Possible Enrollment Experience</li> </ul> <b>Disenrollment Counseling</b> <ul style="list-style-type: none"> <li>• <a href="#">Ops Guide: Disenrollment Counseling</a></li> </ul>	<input type="checkbox"/> Webcast: Intro to LTC Enrollment Counseling <input type="checkbox"/> Video: Enrollment Counseling: A Focus on FC and IRIS <input type="checkbox"/> Video: Enrollment Counseling: FC, Partnership, PACE and IRIS <input type="checkbox"/> Video: Enrollment Counseling: FC, Partnership and IRIS <input type="checkbox"/> Enrollment Counseling Publications  <input type="checkbox"/> Access/Enrollment Evaluation Report <input type="checkbox"/> Power Point: How to Deliver the Best Enrollment Experience  <input type="checkbox"/> Ops Guide: Disenrollment Counseling	

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9.	<b>Medicaid Systems and Processes</b> <ul style="list-style-type: none"> <li>• <i>Collaboration with Income Maintenance</i></li> <li>• <i>How to Request and End Systems/Application Access for Staff</i></li> <li>• <i>Enrollment and Disenrollment Processes</i></li> </ul>	<b>Collaboration with Income Maintenance</b> <ul style="list-style-type: none"> <li>• <a href="#">Wisconsin IM Consortia Information and Map</a></li> </ul> <b>Systems Access Requests</b> <ul style="list-style-type: none"> <li>• <a href="#">CARES Automated Systems Access Request</a></li> <li>• <a href="#">CARES Automated Systems Access Request Instructions</a></li> <li>• <a href="#">Agency Data Security Staff User Agreement</a></li> <li>• FHiC Partner Portal Access Resource Center Role</li> <li>• FHiC Partner Portal Access Resource Enrollment Center Role</li> </ul> <b>Enrollment Streamlining</b> <ul style="list-style-type: none"> <li>• <a href="#">Training: Enrollment Streamlining</a> (Passcode: EST1234)</li> <li>• Enrollment/Disenrollment Process Chart</li> </ul> <b>Enrollment and Disenrollment Processes</b> <ul style="list-style-type: none"> <li>• New IRIS Enrollment Process</li> <li>• MCO to IRIS Enrollment Process</li> </ul>	<input type="checkbox"/> IM Consortia Information Map  <input type="checkbox"/> CARES Automated Systems <input type="checkbox"/> Access Request <input type="checkbox"/> CARES Automated Systems Access Request Instructions <input type="checkbox"/> Staff User Agreement <input type="checkbox"/> FHiC Resource Center Role <input type="checkbox"/> FHiC Resource Enrollment Center Role  <input type="checkbox"/> Training: Enrollment Streamlining <input type="checkbox"/> Enrollment/Disenrollment Process Chart  <input type="checkbox"/> New IRIS Enrollment Process <input type="checkbox"/> MCO to IRIS Enrollment Process	
10.	<b>Long Term Care Functional Screen</b> <ul style="list-style-type: none"> <li>• <i>Overview of the LTC FS</i></li> <li>• <i>Becoming a Certified Screener</i></li> <li>• <i>The Role of the Screen Liaison</i></li> <li>• <i>LTC FS Quality Assurance</i></li> </ul>	<ul style="list-style-type: none"> <li>• The Adult LTC FS Screen Liaison</li> <li>• LTC FS Quality Assurance</li> <li>• Adult LTC Functional Screen Transfers</li> <li>• <a href="#">Ops Guide: LTC FS Re-Screening Guidelines for ADRCs</a></li> <li>• <a href="#">Certification Course</a></li> <li>• <a href="#">Human Services System Gateway</a></li> <li>• <a href="#">Wisconsin's Functional Screen Webpage</a></li> </ul>	<input type="checkbox"/> LTC FS Screen Liaison <input type="checkbox"/> LTC FS Quality Assurance <input type="checkbox"/> Functional Screen Transfers <input type="checkbox"/> Ops Guide: LTC FS Guidelines <input type="checkbox"/> Certification Course <input type="checkbox"/> HS System Gateway <input type="checkbox"/> LTC FS Webpages	

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11.	<b>Benefit Counseling Services</b> <ul style="list-style-type: none"> <li>• <i>Program Overview and History</i></li> <li>• <i>Program Administration and Services</i></li> <li>• <i>Program Attorney Roles and Entities</i></li> <li>• <i>ADRC and Aging Unit Responsibilities</i></li> <li>• <i>Confidentiality and Client Consent</i></li> <li>• <i>Scope of Services</i></li> <li>• <i>Data and Reporting</i></li> </ul>	<b>Disability Benefit Specialist</b> <ul style="list-style-type: none"> <li>• <a href="#">DBS Program Brochure</a></li> <li>• <a href="#">Sample DBS Job Description</a></li> <li>• <a href="#">Managing Benefit Specialist Services at the ADRC</a></li> <li>• <a href="#">Caseload Management Guidelines for Benefit Specialists</a></li> <li>• <a href="#">DBS Policies and Procedures</a></li> <li>• <a href="#">DBS Scope of Services Publication</a></li> <li>• <a href="#">Initial Training for New DBS</a></li> <li>• <a href="#">DBS Ongoing Training Requirements</a></li> <li>• <a href="#">Monetary Impact Guide</a></li> <li>• <a href="#">2015 Table</a></li> <li>• <a href="#">DBS 2014 Summary Report</a></li> <li>• DBS 2015 Training Calendar</li> </ul> <b>Elderly Benefits Specialists</b> <ul style="list-style-type: none"> <li>• <a href="#">EBS Program Brochure</a></li> <li>• <a href="#">Managing Benefit Specialist Services at the ADRC</a></li> <li>• <a href="#">Caseload Management Guidelines for Benefit Specialists</a></li> <li>• <a href="#">EBS 2013 Program Summary Report</a></li> <li>• <a href="#">SHIP Fact Sheet</a></li> </ul> <b>To Review on Your Own:</b> <ul style="list-style-type: none"> <li>• <a href="#">DBS Webpage</a></li> <li>• <a href="#">DBS Database Manual</a></li> <li>• <a href="#">Dynamics of Wisconsin's Disability and Elderly Specialist Services: Structure, Processes and Outcomes</a></li> <li>• <a href="#">EBS Webpage</a></li> <li>• <a href="#">Medicare Counseling for Wisconsin Residents</a></li> <li>• <a href="#">Manual of Policies, Procedures and TA for the WI Aging Network</a></li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> DBS Program Brochure</li> <li><input type="checkbox"/> DBS Job Description</li> <li><input type="checkbox"/> Managing Benefit Specialist Services at the ADRC</li> <li><input type="checkbox"/> Caseload Management Guidelines</li> <li><input type="checkbox"/> DBS Policies and Procedures</li> <li><input type="checkbox"/> DBS Scope of Services Publication</li> <li><input type="checkbox"/> Initial Training for New DBS</li> <li><input type="checkbox"/> DBS Training Requirements</li> <li><input type="checkbox"/> Monetary Impact Guide</li> <li><input type="checkbox"/> 2015 Table</li> <li><input type="checkbox"/> DBS 2014 Summary Report</li> <li><input type="checkbox"/> DBS 2015 Training Calendar</li> </ul> <ul style="list-style-type: none"> <li><input type="checkbox"/> EBS Program Brochure</li> <li><input type="checkbox"/> Managing Benefit Specialist Services at the ADRC</li> <li><input type="checkbox"/> Caseload Management Guidelines</li> <li><input type="checkbox"/> EBS 2013 Summary Report</li> <li><input type="checkbox"/> SHIP Fact Sheet</li> </ul> <ul style="list-style-type: none"> <li><input type="checkbox"/> DBS Webpage</li> <li><input type="checkbox"/> DBS Database Manual</li> <li><input type="checkbox"/> Dynamics of DBS/EBS</li> <li><input type="checkbox"/> EBS Webpage</li> <li><input type="checkbox"/> Medicare Counseling for Wisconsin Residents</li> <li><input type="checkbox"/> Manual for WAN</li> </ul>	

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12.	<b>Governing Board</b> <ul style="list-style-type: none"> <li><i>Governing Board Duties</i></li> <li><i>How to Develop Your Board</i></li> </ul>	<ul style="list-style-type: none"> <li>ADRC Contract (pgs. 40-44)</li> <li><a href="#">Info Bulletin #16: ADRC Governing Boards</a></li> <li>Duties of the ADRC Governing Board</li> <li>Key Issues for ADRC Governing Boards</li> <li>Identification of Unmet Needs</li> <li>Data and Information for ADRC Governing Boards</li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> ADRC Contract (pgs. 40-44)</li> <li><input type="checkbox"/> Info Bulletin #16</li> <li><input type="checkbox"/> Duties of the Governing Board</li> <li><input type="checkbox"/> Key Issues for Governing Boards</li> <li><input type="checkbox"/> Identification of Unmet Needs</li> <li><input type="checkbox"/> Data and Information for Boards</li> </ul>	
13.	<b>Client Tracking and Resource Database</b> <ul style="list-style-type: none"> <li><i>Importance of Data</i></li> <li><i>Consistency Across all ADRCs</i></li> <li><i>Client Tracking Lead</i></li> <li><i>RQS Access to Databases</i></li> <li><i>Resource Database</i></li> </ul>	<ul style="list-style-type: none"> <li><a href="#">Inclusion and Exclusion Guidelines</a></li> <li><a href="#">Style Guide for SAMS-IR</a> (if applicable)</li> <li><a href="#">AssistGuide Tips</a> (if applicable)</li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Inclusion/Exclusion Guidelines</li> <li><input type="checkbox"/> Style Guide (if applicable)</li> <li><input type="checkbox"/> AssistGuide Tips (if applicable)</li> </ul>	
14.	<b>Activity and Encounter Reporting</b> <ul style="list-style-type: none"> <li><i>Activity Reporting Definitions</i></li> <li><i>Importance of Consistency and Standardization</i></li> <li><i>Encounter Data and SAMS</i></li> <li><i>Encounter Reporting Process</i></li> </ul>	<ul style="list-style-type: none"> <li><a href="#">Activity Reporting Definitions</a></li> <li><a href="#">ADRC Reporting Codes</a></li> <li><a href="#">Encounter New User Request Form</a></li> <li>Encounter Data and SAMS</li> <li>Encounter Reporting Process</li> </ul> <p><b>To Review On Your Own:</b></p> <ul style="list-style-type: none"> <li><a href="#">ADRC Reporting</a></li> <li><a href="#">ADRC Activity Reporting Online Training Module</a></li> <li><a href="#">Activity Reporting (Statewide Report) for 2011</a></li> <li><a href="#">Encounter Reporting Website</a></li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Activity Reporting Definitions</li> <li><input type="checkbox"/> ADRC Reporting Codes</li> <li><input type="checkbox"/> Encounter New User Request</li> <li><input type="checkbox"/> Encounter Data and SAMS</li> <li><input type="checkbox"/> Encounter Reporting Process</li> </ul> <ul style="list-style-type: none"> <li><input type="checkbox"/> ADRC Reporting</li> <li><input type="checkbox"/> ADRC Activity Reporting Online Training Module</li> <li><input type="checkbox"/> ADRC Reporting 2011 Report</li> <li><input type="checkbox"/> Encounter Reporting Website</li> </ul>	
15.	<b>Confidentiality</b> <ul style="list-style-type: none"> <li><i>Confidentiality Practices</i></li> <li><i>Confidentiality Policy</i></li> </ul>	<ul style="list-style-type: none"> <li><a href="#">Model Confidentiality Policy</a></li> <li>ADRC Model Consent Form</li> <li>ADRC Information Sharing FAQ</li> <li>Power Point: Confidentiality and ADRCs</li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Model Confidentiality Policy</li> <li><input type="checkbox"/> ADRC Model Consent Form</li> <li><input type="checkbox"/> ADRC Information Sharing FAQ</li> <li><input type="checkbox"/> Power Point: Confidentiality and ADRCs</li> </ul>	

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16.	<b>Complaints and Appeals</b> <ul style="list-style-type: none"> <li>Contractual Requirements for Complaints and Appeals</li> <li>Tracking Complaints</li> <li>Using Data for Quality Improvement</li> </ul>	<ul style="list-style-type: none"> <li><a href="#">Model Complaint and Appeal Policy</a></li> </ul>	<input type="checkbox"/> Model Complaint and Appeal Policy	
17.	<b>Moves/Residency</b> <ul style="list-style-type: none"> <li>Residency Memo</li> <li>Definition of Residency</li> <li>County of Residence and County of Responsibility</li> <li>Establishing an Internal Process for when Referrals are Received</li> </ul>	<ul style="list-style-type: none"> <li><a href="#">Residency Memo</a></li> <li><a href="#">Residency Attachment #1</a></li> <li><a href="#">Residency Attachment #2</a></li> <li><a href="#">Residency Attachment #3</a></li> </ul>	<input type="checkbox"/> Residency Memo <input type="checkbox"/> Residency Attachment #1 <input type="checkbox"/> Residency Attachment #2 <input type="checkbox"/> Residency Attachment #3	
18.	<b>Nursing Home Relocations, Diversions and Closures</b> <ul style="list-style-type: none"> <li>Outreach to Nursing Homes and Residents</li> <li>Connections to Community Living</li> <li>Operational Guidelines</li> <li>Pre-admission Consultation</li> <li>Setting an Enrollment Date</li> <li>MDS Q Process</li> <li>ADRC responsibilities with NH/ICF-IID Closures</li> </ul>	<ul style="list-style-type: none"> <li><a href="#">CCL Brochure</a></li> <li><a href="#">Ops Guide #1: Funding for ADRC Relocation Activities</a></li> <li><a href="#">Ops Guide #2: Best Practices for Outreach to Residents of NHs</a></li> <li><a href="#">Ops Guide #3: ADRC Role with the Money Follows the Person Grant</a></li> <li><a href="#">Pre-Admission Consultation Brochure</a></li> <li><a href="#">Pre-Admission Consultation (PAC)</a></li> <li><a href="#">PAC Memo 11-013</a></li> <li><a href="#">Setting an Enrollment Date Memo (if in a waiting list county)</a></li> <li><a href="#">MDS 3.0 Section Q Memo</a></li> <li>Steps for Nursing Home Access to the Automated NH MDS Section Q Referral Management System</li> <li>The Role of the ADRC in ICF-IID/Nursing Home Downsizing and Closure</li> <li>Power Point: Aging and Disability Resource Centers</li> </ul> <p><b>To Review on Your Own:</b></p> <ul style="list-style-type: none"> <li><a href="#">CCL Webpage</a></li> </ul>	<input type="checkbox"/> CCL Brochure <input type="checkbox"/> Ops Guide #1: Funding <input type="checkbox"/> Ops Guide #2: Outreach <input type="checkbox"/> Ops Guide #3: MFP <input type="checkbox"/> PAC Brochure <input type="checkbox"/> Pre-Admission Consultation (PAC) <input type="checkbox"/> PAC Memo 11-013 <input type="checkbox"/> Setting and Enrollment Date Memo (if applicable) <input type="checkbox"/> MDS 3.0 Section Q Memo <input type="checkbox"/> Step for Nursing Home Access <input type="checkbox"/> The Role of ADRCs with Downsizing and Closure <input type="checkbox"/> Power Point: ADRCs  <input type="checkbox"/> CCL Webpage	

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19.	<b>Customer Service</b> <ul style="list-style-type: none"> <li>• <i>History</i></li> <li>• <i>Research</i></li> <li>• <i>On-going Practice</i></li> <li>• <i>Using Information to Educate Staff, Board, and the Community</i></li> </ul>	<ul style="list-style-type: none"> <li>• Power Point: Delivering Great Customer Service</li> <li>• ADRC Customer Satisfaction: Wrapped in a PACKaGE</li> <li>• Bringing Customer Satisfaction into SCCoPE</li> </ul>	<input type="checkbox"/> Power Point: Delivering Great Customer Service <input type="checkbox"/> PACKaGE domains chart <input type="checkbox"/> SCCoPE domains chart	
20.	<b>Marketing, Outreach, and Public Education</b> <ul style="list-style-type: none"> <li>• <i>Annual Plan</i></li> <li>• <i>Outcomes – Local and Statewide</i></li> </ul>	<ul style="list-style-type: none"> <li>• <a href="#">Ops Guide: Marketing and Public Information</a></li> <li>• <a href="#">Marketing, Outreach and Public Education</a></li> <li>• <a href="#">ADRC Brochure</a></li> <li>• <a href="#">ADRC Logo Guidelines</a></li> </ul> <p><b>To Review on Your Own:</b></p> <ul style="list-style-type: none"> <li>• <a href="#">ADRC Commercials</a></li> </ul>	<input type="checkbox"/> Ops Guide: Marketing and Public Information <input type="checkbox"/> Marketing, Outreach and Public Education <input type="checkbox"/> ADRC Brochure <input type="checkbox"/> ADRC Logo Guidelines  <input type="checkbox"/> ADRC Commercials	
21.	<b>Quality Assurance and Quality Improvement</b> <ul style="list-style-type: none"> <li>• <i>Quality Assurance Plan</i></li> <li>• <i>Change Leader Academy</i></li> </ul>	<ul style="list-style-type: none"> <li>• <a href="#">ADRC Quality Assurance Plan Template</a></li> <li>• PowerPoint: Making a Quality Assurance Plan Work for You</li> <li>• <a href="#">ADRC Quality: Best Practices in Achieving Customer Satisfaction</a></li> <li>• <a href="#">Aiming for Excellence Smart Chart</a></li> <li>• Change Leader Academy Description</li> <li>• Power Point: Intro to ADRC Quality Improvement Program</li> </ul>	<input type="checkbox"/> ADRC QA Plan Template <input type="checkbox"/> PowerPoint: Making a QA Plan Work for You <input type="checkbox"/> ADRC Quality: Best Practices in Achieving Customer Satisfaction <input type="checkbox"/> Smart Chart <input type="checkbox"/> Change Leader Academy <input type="checkbox"/> Power Point: Intro to ADRC Quality Improvement Program	
22.	<b>Supervising Staff</b> <ul style="list-style-type: none"> <li>• <i>Supervisor Tools</i></li> <li>• <i>Creating a Team</i></li> <li>• <i>Skill Development and Coaching</i></li> <li>• <i>Staff Qualifications</i></li> <li>• <i>Waiver of Education and Experience</i></li> </ul>	<ul style="list-style-type: none"> <li>• <a href="#">Supporting the Supervisor: Helpful Information for Information and Assistance Supervisors</a></li> <li>• Qualifications for ADRC Staff</li> <li>• <a href="#">Request for Waiver of Education and Experience Requirements</a></li> </ul>	<input type="checkbox"/> Helpful Info for I&A Supervisors <input type="checkbox"/> Qualifications for ADRC Staff <input type="checkbox"/> Request for Waiver: Education and Experience	

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23.	<b>Training</b> <ul style="list-style-type: none"> <li>• <i>ADRC Meetings</i></li> <li>• <i>Training Plan</i></li> <li>• <i>Communication of Trainings</i></li> <li>• <i>Mandatory Trainings</i></li> <li>• <i>Future Learning Management System (LMS)</i></li> </ul>	<ul style="list-style-type: none"> <li>• Schedule of ADRC Director Meetings</li> <li>• ADRC Meetings</li> <li>• ADRC Core Training</li> <li>• ADRC Orientation/Technical Assistance</li> </ul>	<input type="checkbox"/> Schedule of ADRC Director Meetings <input type="checkbox"/> ADRC Meetings <input type="checkbox"/> ADRC Core Training <input type="checkbox"/> ADRC Orientation/ Technical Assistance	
24.	<b>Advocacy</b> <ul style="list-style-type: none"> <li>• <i>Advocacy for Consumers</i></li> <li>• <i>Advocacy for the Community</i></li> <li>• <i>Advocacy vs. Lobbying</i></li> </ul>			
25.	<b>Location and Physical Plant</b> <ul style="list-style-type: none"> <li>• <i>Ensuring Access to Services</i></li> </ul>	<ul style="list-style-type: none"> <li>• <a href="#">ADRC Location and Physical Plant</a></li> </ul>	<input type="checkbox"/> ADRC Location and Physical Plant	
26.	<b>Regional ADRCs</b> <ul style="list-style-type: none"> <li>• <i>Expectations of the Regional Model</i></li> <li>• <i>Regional ADRC Management Plan Template</i></li> </ul>	<ul style="list-style-type: none"> <li>• Regional ADRC Management Plan Template</li> <li>• Special Requirements for Regional ADRCs (<i>ADRC Contract pgs. 61-63</i>)</li> </ul>	<input type="checkbox"/> Regional ADRC Management Plan Template <input type="checkbox"/> Special Requirements for Regional ADRCs ( <i>ADRC Contract pgs. 61-63</i> )	
27.	<b>Dementia Care System</b> <ul style="list-style-type: none"> <li>• <i>Dementia System Redesign Plan</i></li> <li>• <i>Overview of Dementia Care Specialist Program</i></li> <li>• <i>Dementia Friendly Communities</i></li> <li>• <i>Dementia Capable ADRCs</i></li> <li>• <i>Guiding Principles</i></li> </ul>	<ul style="list-style-type: none"> <li>• <a href="#">Dementia Care System Redesign Website</a></li> <li>• <a href="#">Wisconsin Dementia Care System Redesign Plan</a></li> <li>• <a href="#">Building Dementia-Friendly Communities</a></li> <li>• <a href="#">Dementia Care Guiding Principles</a></li> <li>• Memory Screens</li> <li>• Power Point: DCS Program</li> <li>• <a href="#">DCS Brochure - Professional</a></li> <li>• <a href="#">DCS Map</a></li> <li>• Memory Care Connections</li> <li>• ADRC Contract – DCS Addendum (<i>if applicable</i>)</li> <li>• DCS Position Description (<i>if applicable</i>)</li> </ul>	<input type="checkbox"/> Dementia Redesign Website <input type="checkbox"/> Dementia Care Redesign Plan <input type="checkbox"/> Building Dementia-Friendly Communities <input type="checkbox"/> Dementia Care Guiding Principles <input type="checkbox"/> Memory Screens <input type="checkbox"/> Power Point: DCS Program <input type="checkbox"/> DCS Brochure -Professional <input type="checkbox"/> DCS Map <input type="checkbox"/> Memory Care Connections <input type="checkbox"/> ADRC Contract – DCS Addendum	

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			(if applicable) <input type="checkbox"/> DCS Position Description (if applicable)	
	TOPIC	SUPPORTING DOCUMENTATION/LINKS	COMPLETE/PROVIDED?	DATE
28.	<b>Aging</b>	<ul style="list-style-type: none"> <li>Power Point: The Aging Network</li> </ul>	<input type="checkbox"/> Power Point: The Aging Network	
29.	<b>Resources</b> <ul style="list-style-type: none"> <li><i>Communication process</i></li> <li><i>Website Navigation</i></li> <li><i>Available Resources</i></li> </ul>	<ul style="list-style-type: none"> <li>Adobe Connect and Conference Calls</li> <li>Audio Conferencing Touch Tone Commands</li> <li><a href="#">State of Wisconsin Email Encryption</a></li> <li>BadgerAging Listserv Instructions</li> </ul> <p><b>To Review On Your Own:</b></p> <ul style="list-style-type: none"> <li><a href="#">ADRC Home Page*</a></li> </ul>	<input type="checkbox"/> Adobe Connect and Conference Calls <input type="checkbox"/> Audio Conferencing Touch Tone Commands <input type="checkbox"/> WI Email Encryption <input type="checkbox"/> BadgerAging Listserv Instr  <input type="checkbox"/> ADRC Home page	

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