ADRC
of Wisconsin

Aging and Disability Resource Centers of Wisconsin

ADRC Specialist and Tribal ADRS

Enrollment Counseling Feedback Tool Instructional Guide

Introduction:

Each Aging and Disability Resource Center (ADRC) strives to provide a consistent high quality customer experience. There are many components to providing individualized, person-centered, Information and Assistance and Options Counseling. This tool (P-01068A) provides a place and format for ADRC supervisors to document observations of ADRC staffs' interactions with customers focusing on enrollment counseling. Coaching provides an opportunity to provide advice, guidance and support as ADRC staff hone their skills.

The tool follows the structure of options counseling beginning with "Welcome" and ending with "Next Steps/Action Plan." Each section outlines key components that generally occur during that portion of the conversation with the customer. As you are aware, customer conversations may not happen in a linear fashion. ADRC supervisors using the tool may need to take notes as they observe the conversation and complete sections as they occur naturally.

In addition to feedback to ADRC staff regarding their interaction with customers, this tool (P-01068A) provides a mechanism to log feedback and provide coaching on the notes that ADRC staff write about the customer interaction. Documentation of the customer interaction provides a record that is helpful when a question regarding enrollment arises, when customers re-contact the ADRC, when another person contacts the ADRC on behalf of the customer, when staff respond to an inquiry from a person who spoke with or met with a colleague and when the ADRC receives a follow-up call from a managed care organization (MCO) or IRIS consultant agencies. Documentation of the customer contact is also evidence that ADRC activities have occurred, and may be a helpful reference in the event of a customer complaint. A list of printed materials commonly shared with customers is included in each of the overall notes areas.

Observation Script:

This optional script may be used to request permission for another person to observe your meeting.
"Part of our ADRC's quality assurance includes having one of my colleagues or a supervisor observe me during a home visit periodically. This helps ensure that I am providing quality services. Are you comfortable with (name of the person) attending our meeting? If not, please let me know. I respect your decision and want you to feel as comfortable as possible during our meeting."

Feedback Tool Sections:

Page 1

At the top of page 1, ADRC supervisors indicate the setting of the customer interaction (office, home or other) in addition to noting when the conversation occurred. The next section is used to document when the tool was completed, the names of the supervisor, staff and customer. There is also a section on this page for the supervisor to write notes reflecting on the overall experience.

The detail of the tool begins in the middle of page 1 starting with the Welcome. Key components contained in the Welcome are listed in this section. Documentation of the Welcome is not required. That being said, ADRC staff may choose to document what occurred during this segment of the customer conversation, if appropriate. Supervisors

are encouraged to add information in the section titled "Overall - Areas of Consideration and Coaching." This is an opportunity to recognize good work and provide support for improvement, if needed.

General Tips for Positive Coaching:

- The Welcome is an opportunity to develop rapport and build trust by demonstrating kindness, warmth and understanding. Supervisors can support staff by acknowledging how staff have achieved this through their words, tone of voice and other actions.

- Sharing the purpose of the ADRC and the staff's role with customers, helps to clarify what the ADRC does and affirm what the customer brings to the conversation. Customers may be confused about the enrollment process and have questions related to Medicaid, cost share and waiver programs (Family Care, Partnership, PACE [Program of All Inclusive Care for the Elderly] and IRIS [Include, Respect, I-Self Direct]). Customers may also have a misconception about the role of the ADRC and when waiver services will begin. Clarifying the staff's role will prevent misunderstandings and puts the conversation on the right track.

Page 2

Page 2 focuses on the Discovery phase of the customer interview. During this phase, key information about publicly-funded long-term care programs is shared with the customer. The person's thoughts and questions about program options are elicited and clarified. The majority of the components of Discovery require documentation. This requirement is indicated by the use of an asterisk (*). Use the Documented section to indicate if documentation was present (Yes) or not (No) or not applicable (N/A). As in the previous section, there are two options for providing written feedback. The first feedback section, is used to share thoughts on each of the components. The "Overall – Area of Consideration and Coaching" section at the bottom of the page is available for supervisors to write their overall thoughts on this section and identify areas for coaching.

General Tips for Positive Coaching:

- A result of the Discovery phase is ADRC staff eliciting from customers their knowledge of publicly funded long-term care programs. Staff learn the customers perspectives on the options presented.

- Supervisors can affirm staff on their strategic use of open-ended questions, reflections, validation and other skills used in this area.

- Staff refrain from overwhelming the customer and pace the conversation to maximize the persons understanding. Supervisors are encouraged to acknowledge when ADRC staff are genuine, patient, maintain a tone of voice that communicates understanding and choose words that are non-judgmental. Supervisors can also acknowledge when the staff refrain from using jargon and describe programs using everyday language.

Page 3

Page 3 focuses on the component Decision Support. As in previous pages, required documentation is indicated by the use of an asterisk (*), space is provided for supervisors to write specific comments for each component and overall comments can be recorded.

General Tips for Positive Coaching:

- Over time, information about publicly funded long-term care waiver programs change. ADRC staff are required/ expected to keep up-to-date and use approved Wisconsin Department of Health Services educational materials. Supervisors validate using up-to-date materials and being prepared for the conversation with the customer. A key take-away from this section is being able to clearly and accurately reflect (from the customer's perspective), their thoughts about the programs and which program best fits them.

- Decision support occurs within Enrollment Counseling. Customers often want additional information about the program they are most interested in. This additional detail could include information on the MCOs provider network or learning about the IRIS budget process. Supervisors listen for staff's use of clear, jargon-free language to describe services, as well as reflections that contain information about the customer's individual views or concerns about each service discussed.

- If the customer chooses a program with more than one managed care organization or IRIS consultant agency (ICA), the supervisor may want to note the use of standard materials provided by the Wisconsin Department of Health Services, that the staff refers to when describing the different MCOs or ICAs.

- Customers can be overwhelmed by the amount of information presented and may need time to think through options. Supervisors can validate staff who speak to the feeling of being overwhelmed and the desire not to rush decisions.

Page 4

The last page of the **In-Person Feedback and Documentation Review Tool** contains two sections. The first section is the Next Steps/Action Plan components. In this section supervisors write specific feedback in the space provided and overall comments in the middle of the page.

The last section of this page is used to document whether or not the staff checked in with the customer throughout the process, as well as noting the ADRC activities that occurred during the customer interaction.

General Tips for Positive Coaching:

- Some customers may be interested in learning about services, but uncertain if it is time to act. ADRC supervisors have an opportunity to affirm staff that they need to determine the customer's timeline to make a decision, identify information the customer may be missing, and any other factors that might get in the way of the customer accessing needed help.

- Offers of assistance with next steps are made during this time. Supervisors can validate how staff make this offer and still acknowledge or support the person's autonomy.

- Follow-up is a key driver of customer satisfaction. Supervisors acknowledge when follow-up occurs according to ADRC policy.