ADRC of Wisconsin

Aging and Disability Resource Centers of Wisconsin

Information and Assistance Specialist

Disenrollment Counseling Feedback Tool Instructional Guide

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DHS/P-01069

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-01069A) provides a place and format for ADRC supervisors to document observations of ADRC staffs' interactions with customers focusing on disenrollment 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-01069A) 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 to reference when a question regarding disenrollment or enrollment into a different long-term care program, managed care organization (MCO) or IRIS consultant agencies arises. Documentation can be a helpful reference 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/or when the ADRC receives a follow-up call from an 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.

Feedback Tool Sections:

Page 1

At the top of page 1, ADRC supervisors indicate the setting of the customer interaction, such as: office, home or other and the date 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 the overall experience.

The detail of the tool begins in the middle of this page starting with the "Welcome." Key components contained in the "Welcome" are listed in this section. Documentation of the "Welcome" is not required. However, ADRC staff may choose to document what occurred during this segment of the customer conversation. 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 clarify what the ADRC does and affirms what the customer brings to the conversation. Customers may be confused about their current situation. They may not realize that disenrolling from a program and not selecting another long-term care program may mean the end to services and their benefits through Medicaid; this would occur if eligibility is contingent on enrollment.

Page 2

This page focuses on the "Discovery" phase of the customer interview. During this phase, ADRC staff learn the reason the person is considering disenrolling from a publicly-funded long-term care program, and show key information about publicly-funded long-term care programs 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 writing 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 and identify areas for coaching.

General Tips for Positive Coaching:

- During the "Discovery" phase ADRC staff elicit from customers the reason the person is considering disenrollment. Supervisors can affirm staff on their strategic use of open-ended questions, reflections, validating and other skills used in this area.

- Staff clarify if the person is, or has started, a complaint or grievance process and if any referral information or contact with the MCO member liaison or IRIS agencies is needed. During this time, staff refrain from overwhelming the customer, and pace the conversation to maximize 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

This page 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 in the "Overall – Area of Consideration and Coaching" section.

General Tips for Positive Coaching:

- Over time, information about publicly funded long-term care waiver programs change. ADRC staff are required to stay 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 potential of disenrolling from their current long-term care program.

- Decision Support occurs within disenrollment counseling. Customers may want detailed information about a different long-term care program or MCO. Customers may want to learn what other services and supports are available in the community that can be accessed through the ForwardHealth Card, paid for using their own money or supported by informal caregivers or low cost/volunteer options.

- Customers may want to appeal a denial or reduction of services decision and may need assistance to access advocacy assistance from an Ombudsman.

- 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 regarding a potential disenrollment.

- 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 related to Next Steps/ Action Plan, and comments in the "Overall – Area of Consideration and Coaching" section.

This section is used to list paperwork that was completed and/or processed, next steps the person is choosing to take, assistance provided by the ADRC including future follow-up activities planned, whether or not the staff checked in with the customer throughout the process, and ADRC activities that occurred during the customer interaction.

General Tips for Positive Coaching:

- ADRC supervisors have an opportunity to affirm staff who clarify the customer's understanding of Next Steps, referral information provided and potential dates impacting service provision such as the disenrollment or re-enrollment date or payment of cost-share plans. 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.