Information and Assistance

ADRC Operations Manual

This chapter applies to aging and disability resource center (ADRC) specialists and Tribal aging and disability resource specialists (Tribal ADRSs), herein referred to as “agency” or “staff.”

I. Introduction

The ADRCs and Tribal ADRSs provide information and assistance to older adults, adults with disabilities, and their families, friends, caregivers, and others who ask for assistance on their behalf. Providing information and assistance includes listening to and supporting people, assessing their needs and personal preferences, identifying the most appropriate resources to meet their needs, helping them to connect with service providers, and providing information to meet their needs using a person-centered approach. Information and assistance must be provided in a manner convenient to the customer including, but not limited to, in person at the person's home or at the agency as an appointment or walk-in, over the telephone, virtually, via email, or through written correspondence.

II. Requirements for performing information and assistance

A. Process for providing information and assistance

1. Answer the phone by stating "Aging and Disability Resource Center of ..." or the name of your Tribal partner agency and identifying yourself to the customer.
2. Respond to requests for information and assistance within one business day. If necessary, your initial response may be to acknowledge the request and schedule an appointment with the customer.
3. Evaluate the call or request by:
   - Establishing rapport with the customer.
   - Supporting and encouraging the customer.
   - Identifying the issue(s) that led to the inquiry.

- Determining the nature of the situation.
- Evaluating the knowledge, capacity and personal preferences of the customer in order to determine how to best provide assistance.
- Identifying the most appropriate resource(s) to meet the customer's need(s).
- Evaluating the need for ADRC or Tribal agency services such as options counseling, benefits counseling, and dementia related services. Criteria used to evaluate the need for options counseling are:
    - Limited ability to communicate
    - Limited ability to advocate for self
    - Limited support system
    - Limited capacity to act on information provided
    - New or advancing health condition that is impacting the customer
    - Life altering event or situation that is impacting the customer
    - Significant change in circumstances that is adversely impacting the customer
    - Limited financial resources to fund needed services

  Note: If one or more of these criteria exist, the staff member should offer options counseling to the customer. When offering options counseling, the staff member should phrase the offer for options counseling as meeting with the customer to learn more information about their situation so the agency can provide more in-depth assistance. The exact phrase of "options counseling" should not be used because this is professional jargon that the general public is unlikely to understand.

4. Provide the customer with information that is:
    - Accurate and useful.
    - Relevant to the customer's expressed need and personal preferences.
    - In the language and formats that are easiest for the customer to understand.
    - Objective and does not appear to favor or attempt to persuade the customer to choose any particular setting, program, service, or provider.

5. Provide referrals or assistance in accessing public and private resources. The information that you gathered while evaluating the call or request should be used to determine what referrals and assistance you provide to the customer.

6. Follow up with customers to determine whether their needs were met and whether they need additional information and assistance. Provide follow-up in a manner that is consistent with the required Follow-Up Policy (P-02923-07).

7. Advocate on the behalf of customers who have issues with access to services.

B. Recognizing and responding to emergencies

Staff must be prepared to recognize and effectively manage emergency situations. Train staff to identify an emergency and apply emergency procedures to handle the situation. Train staff to:

- Remain calm.
- Attempt to de-escalate the situation.
- Identify emergency-related symptoms such as a heart attack, stroke, suicidal ideation, or domestic violence.
- Collect needed information.
- Connect the customer with local emergency service providers.
- Follow up as needed.

ADRCs and Tribal ADRSs are expected to recognize and respond to emergencies; however, they are not expected or considered to be emergency service providers. During business hours, staff will follow protocols and processes established by local emergency resources, such as 911 services or crisis intervention services, in order to assure that people are promptly connected with the appropriate emergency service provider when an immediate risk has been identified.

C. Youth in transition

Upon request, the ADRC or Tribal ADRS must provide youth and their families with information about disability benefits, long-term care programs, and other resources that may be available when they reach adulthood, help them think through their options, and assist in accessing programs and services, as appropriate. Staff who provide information and assistance need to be familiar with any resources specific to youth in transition. The agency should utilize and provide the Preparing for Life as an Adult: Transition Planning for Youth (P-00413A).

ADRC and Tribal ADRS services are available to youth who are age 17 years and 6 months or older and their families. If the agency receives a request for information for a youth who is under the age of 17 years and 6 months, they should refer them to the children's long-term support (CLTS) waiver agency. The agency may, at its discretion, make an exception in special cases where the complexity of the customer's needs require additional time for options counseling (P-03062-02).

D. Documentation

Document every encounter with or on behalf of a customer in the statewide reporting and case management system. For detailed instructions on how to complete the entry, refer to the PeerPlace User Guide for ADRC Specialists and Tribal ADRSs.

III. Collaborating with other aging and disability programs

Provision of information and assistance is a function of both the aging unit and the ADRC or Tribal ADRS. It is critical that the aging unit and the ADRC or Tribal ADRS collaborate to provide this service to community members. Staff providing information and assistance must be knowledgeable about all ADRC, Tribal ADRS, and aging programs, including local policies and procedures such as referrals to these programs. Therefore, all staff providing information and assistance are strongly encouraged to familiarize themselves with all of the program sections in this operations manual. In many agencies, staff providing information and assistance also provide other services such as options counseling.

IV. Operational policies and procedures

A. Statutory references

Provision of information and assistance is a requirement of ADRCs and Tribal program partners under Wisconsin statute. It is also a requirement under the federal Older Americans Act.

- Wisconsin Stat. § 46.283
- Wisconsin Stat. § 46.82
- Wisconsin Admin. Code § DHS 10.23
- Older Americans Act of 1965—2020 Reauthorization

B. Agency requirements

The agency will have at least one full-time ADRC specialist or Tribal ADRS position, wholly within the agency, that provides information and assistance as its primary job responsibility. This position may also provide options counseling, eligibility, and enrollment functions.

Employees of the agency and any of its subcontractors who provide information and assistance, options counseling, benefits counseling, long-term care functional screening, enrollment counseling, or other professional responsibilities must have a Bachelor of Arts or Science degree or a license to practice as a registered nurse in Wisconsin. In addition, they must have the equivalent of at least one year of full-time experience in a health or human services field, working with one or more of the client populations served by the ADRC or Tribal ADRS. Qualifying work experience may be paid or unpaid and may include internships, field placements, and volunteer work.

The ADRC or Tribal partner agency must obtain approval from DHS by submitting a Request for Approval of Alternative Staff Experience and/or Training (F-00054) prior to making a job offer to a candidate that lacks the degree or experience described above.

Staff providing information and assistance must also meet the minimum FTE requirement of .5 FTE. All part-time staff providing information and assistance must do so at least half time or a waiver of the requirement needs to be requested. Agencies can request a waiver of the .5 FTE requirement by completing and submitting a Request for Waiver of the 0.5 Full-Time Equivalent Requirement for ADRC Staff (F-00054D).

Staff providing information and assistance must have private office space or access to private meeting space where they can have confidential conversations. Customers and families must not experience a delay in meeting with agency staff because of a lack of private space.

C. Supervision

Staff providing information and assistance may be directly supervised by the ADRC or Tribal agency director or another supervisory position within the agency. Supervisors are expected to maintain expertise in the requirements for information and assistance as well as best practice approaches in order to support agency staff.

Supervisors of staff who provide information and assistance are encouraged to observe staff providing information and assistance. Providing feedback to staff providing information and assistance is a great way to help them fine tune their skills and grow in their abilities. Supervisors may use the Information and Assistance Supervisor Observation and Support Tool (F-02860) and the Information and Assistance Supervisor Observation and Support Tool Guide (P-03076).

D. Allowable funding source(s)

Review information about the ADRC grant in the Fiscal Management chapter of the ADRC operations Manual (P-03062-16).

E. Policy requirements

- Follow-Up Policy (P-02923-07)
- Conflict of Interest Policy (P-02923-03)
- Confidentiality Policy (P-02923-06)
- Complaint Policy (P-02923-02)

F. Training and certification requirements

Staff must have thorough knowledge of the mission, operations, and referral and confidentiality policies of the agency. They must also have general knowledge of the agency's customer populations; expertise in phone etiquette; excellent communication skills; excellent listening skills; knowledge and ability to connect customers to appropriate ADRC staff; the ability to recognize and appropriately respond to people with special hearing, language, or cognitive needs; and the ability to recognize and appropriately respond to emergencies.

At least one ADRC specialist providing information and assistance at the ADRC will be certified by Inform Wisconsin as a Certified Information and Referral Specialist (CIRS) or Certified Information and Referrals Specialist-Aging/Disability (CIRS-A/D). Time-limited extensions may be requested, subject to DHS approval, for individuals who lack a bachelor's degree and must work longer to be eligible to take the Alliance of Information & Referral Systems (AIRS) exam or who fail the certification examination and are scheduled to retake the test.

Staff providing information and assistance are encouraged to complete the following modules in the Learning Management System:

- ADRC Orientation
- ADRC Specialists Initial Training
- Options Counseling Standards (Module 1: Options Counseling Overview)

ADRC specialists and Tribal ADRSs are strongly encouraged to participate in other DHS training opportunities, including professional conferences. This includes, but is not limited to, the Aging, Disability, and Independent Living Network conference, the Inform USA conference, and the Inform Wisconsin conference. A current schedule of trainings can be found on the ADRC Calendar of Events.

G. Reporting requirements

ADRC specialists and Tribal ADRSs must document their interactions with individual customers, including the nature of the inquiry, information discussed, resources shared, decisions made, and next steps. Documentation will include the required elements described in the PeerPlace User Guide for ADRC Specialists and Tribal ADRSs.

ADRC specialists and Tribal ADRSs who provide information and assistance as one of their main job responsibilities are required to complete 100% Time and Task Reporting for Medicaid Administrative claiming. Detailed information on 100% Time and Task Reporting (P-03062-10) can be found within that section of this manual.

V. Additional resources and tools

- Inform Wisconsin
- County Communities on Transition
- Wisconsin County Community on Transition Toolkit