

DRAFT
ADRC Operations Guide
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3-4-08

1. Purpose and Organization of the Operations Guide

- A compendium of helpful information to provide guidance for ADRC start-up and operations
- A comprehensive reference source for ADRCs
- Information organized according to ADRC service or function, following the same structure as the ADRC contract
- Quick links to more in-depth information about key program areas

2. Mission / What is an ADRC

- 2.1 Aging and Disability Resource Center Vision (Info bulletin #3)
- 2.2 Video Introduction to ADRCs (9 minutes)
- 2.3 Guiding Principles for ADRCs (ADRC Contract Appendix D, adapted from the final report of the Aging Network Modernization Committee)

3. Client Populations – Who do ADRCs serve?

- 3.1 Definitions (from <http://dhfs.wisconsin.gov/LTCare/FunctionalScreen/> , Wisconsin Statutes, other)

4. Location and Physical Plant

- 4.1 Physical Plant of the Aging and Disability Resource Center (Info Bulletin #5)

5. Services Provided by the ADRC

- 5.1 Marketing, Outreach and Public Education
 - 5.1.1 Marketing Ideas (operational guide #2)
 - 5.1.2 ADRC Logo (when available)
- 5.2 Information and Assistance
 - 5.2.1 Planning for I&A Service (Info #6)
 - 5.2.2 Hyperlink to AIRS standards
 - 5.2.3 Sample I&A Specialist job descriptions (here or under staffing?)
 - 5.2.4 I&A follow up policy guide (Operational Guide #1)
 - 5.2.5 Sample follow-up policy (Portage?)
 - 5.2.6 Resource Database – Beacon (ask Mo and Carl)
 - 5.2.7 Client Tracking Database – Beacon (ask Mo and Carl)

- 5.3 Long Term Care Options Counseling
 - 5.3.1 Hyperlink to options counseling video and webcasts
 - 5.3.2 Difference between options counseling and I&A
- 5.4 Pre-Admission Consultation
 - 5.4.1 PAC info handouts prepared by Carrie
- 5.5 Elderly Benefits Counseling
 - 5.5.1 Hyperlink to EBS webpage
(<http://dhfs.wisconsin.gov/aging/Genage/BENSPECS.HTM>)
 - 5.5.2 Planning for Disability and Elderly Benefit Specialists (Info #9)
 - 5.5.3 Elderly Benefit Specialist in State Funded ADRCs (Info #15)
 - 5.5.4 Sample EBS job description (ask Glenn)
- 5.6 Disability Benefits Counseling
 - 5.6.1 DBS Program Policies and Procedures
 - 5.6.2 DBS pamphlet
(<http://dhfs.wisconsin.gov/disabilities/benspecs/DBSPBrochure2007Final.pdf>)
 - 5.6.3 DBS Start up checklist
 - 5.6.4 Sample DBS job description (ask Holly)
 - 5.6.5 Sign language DBS
(<http://dhfs.wisconsin.gov/disabilities/benspecs/deafDBS.htm>)
- 5.7 Access to Publicly Funded Long-Term Care Programs and Services
 - 5.7.1 Enrollment Plan template and related technical assistance documents (Resource Centered vol. 1, issue 1))
 - 5.7.2 Long Term Care Functional Screen
(<http://dhfs.wisconsin.gov/LTCare/FunctionalScreen/>)
 - 5.7.3 Training webcasts on the Functional Screen
(<http://dhfs.wisconsin.gov/LTCare/FunctionalScreen/training.htm>)
 - 5.7.4 Enrollment Counseling (Resource Centered, January 18, 2008)
 - 5.7.5 Assistance with Financial Eligibility Determination
 - 5.7.6 Assistance with Processing Enrollments
 - 5.7.7 Disenrollment Counseling
- 5.8 Access to Mental Health and Substance Abuse Services
 - 5.8.1 Info bulletin on ADRC services to people with mental health needs (#18)
 - 5.8.2 Donna/Joyce memo on ADRC service to people with mental illness and substance use disorders (?)
 - 5.8.3 Richland County MOU
 - 5.8.4 Richland County emergency procedures
 - 5.8.5 LaCrosse memo to consumers on what to expect (from Peggy Herbeck)

- 5.9 Access to Other Programs and Benefits
 - 5.9.1 Links to information on major programs (MA, SSI, FoodShare, housing assistance, etc.)
- 5.10 Short Term Care Coordination and Case Management
- 5.11 Emergency Response
 - 5.11.1 Emergency response ideas from ADRC workgroup (draft from notes)
 - 5.11.2 Link to Wisconsin Emergency Management (<http://emergencymanagement.wi.gov>)
 - 5.11.3 Voluntary Organizations Active in Disasters (VOAD) – ask Gail S or Orren Hammes
 - 5.11.4 DHFS Disaster Plan - ? (<http://dhfs.wisconsin.gov/preparedness/> and http://dhfs.wisconsin.gov/preparedness/pdf_files/DHFSHSDisasterPlan121404.pdf)
- 5.12 Elder/Adults-at-Risk and Adult Protective Services
 - 5.12.1 Elder/Adults at Risk law, definitions, reporting system, and training (<http://dhfs.wisconsin.gov/aging/elderabuse/index.htm>)
 - 5.12.2 I&A Specialists and Benefit Specialists are not mandatory reporters (Department decision under development)
- 5.13 Transitional Services
- 5.14 Prevention and Early Intervention Services
 - 5.14.1 Link to prevention grant information and application - ?
 - 5.14.2 Link to info on chronic disease self management (<http://dhfs.wisconsin.gov/health/diabetes/lwwcc.htm>)
 - 5.14.3 Link to info on falls prevention programs (<http://dhfs.wisconsin.gov/health/InjuryPrevention/Falls.htm>)
 - 5.14.4 Link to info on Alzheimer’s early detection – ask Sharon and Kathy ?
- 5.15 Client Advocacy
 - 5.15.1 List client advocacy organizations and briefly describe what they do and provide links to websites
- 5.16 Community Needs Assessment

6. Organization and Procedural Standards

- 6.1 Name
 - 6.1.1 Reiterate requirement from ADRC contract
- 6.2 Governing Board
 - 6.2.1 ADRC governing boards (Info #17)

- 6.3 Organizational Structure
 - 6.3.1 Organizational Separation Between Aging and Disability Resource Centers and Managed Care Organizations to Avoid Conflicts of Interest (Info #4)
 - 6.3.2 Sample organization charts (?)
- 6.4 Multi-County ADRCs
 - 6.4.1 Multi-County ADRCs (Info #7)
 - 6.4.2 Financial Incentives in Support of Multi-County ADRCs (Info #14)
- 6.5 Staffing
 - 6.5.1 Reiteration of staff education and experience requirements from the ADRC contract
 - 6.5.2 Form for requesting waiver of staff education and experience requirements
 - 6.5.3 Sample position descriptions for ADRC director, I&A specialist, others
- 6.6 Cultural Competence and Diversity
 - 6.6.1 Link to National Center for Cultural Competence [develop one pager from their material]
<http://www11.georgetown.edu/research/gucchd/nccc/>
- 6.7 Accommodation and Accessibility
 - 6.7.1 Interpreter services and other info for working with people with hearing impairments – ask Linda Huffer
 - 6.7.2 Working with blind and low vision – ask Mike N.
 - 6.7.3 ADA/Accessibility (See Info #5)
- 6.8 Complaints and Grievances
 - 6.7.1 Sample complaint and grievance process?
 - 6.7.2 State Fair Hearing Process
- 6.9 Quality Assurance/Quality Improvement Process
 - 6.9.1 Statutory requirements or reiterate contract requirements
- 6.10 Access to and Confidentiality of Records
 - 6.10.1 Reiterate contract requirements
 - 6.10.2 HIPAA applicability interpretation (under development)
- 6.11 Reporting and Records
 - 6.11.1 Reiterate requirements from ADRC contract
 - 6.11.2 Data Reporting Requirements for ADRCs
 - 6.11.3 100% time reporting for MA Match (Excel forms and instructions) – from Julie and Kris

6.11.4 ADRC Annual Update forms and instructions

7. Contract Management

- 7.1 Required Plans, Policies and Procedures
 - 7.1.1 List of required plans, policies and procedures
 - 7.1.2 Suggested formats
- 7.2 Budget Worksheets and instructions from contract - ?
- 7.3 Subcontracts
 - 7.3.1 Reiterate requirements from contract
 - 7.3.2 Subcontractor worksheet
- 7.4 Performance
 - 7.4.1 Reiterate performance of services requirements from contract
 - 7.4.2 Reiterate performance of contract terms during dispute from contract