

ADRC Activity Reporting Requirements and Definitions Updated January 2009

The following requirements and definitions were developed to support consistent reporting of ADRC activities.

Contact

Contact represents an individual one-on-one interaction (conversation) that has occurred between ADRC staff and a person who contacts the ADRC (e.g., an individual with a problem/concern about him/herself or concern about another person). A contact may occur in person, including home visits and walk-ins, over the telephone, via e-mail or through written correspondence where information is exchanged. An individual may contact the ADRC multiple times; each interaction is counted as a contact. A contact is one instance of providing any ADRC activity.

Administrative Calls

Administrative calls or inquires related to the delivery of direct services are not considered contacts. Administrative calls refer to inquires that do not result in the provision of ADRC activities and are not counted as contacts. Some examples of these interactions include scheduling appointments, canceling services (e.g., home-delivered meals, volunteer transportation, etc.) and leaving messages for staff.

Collateral Contacts (optional)

ADRCs are **not** required to report conversations with individuals other than the consumer or someone concerned about this specific individual. These contacts are generally referred to as collateral contacts (interactions with agencies, providers or others who have relevant information regarding the individual). However, ADRCs may choose to gather and report this level of interaction using the caller type “other”.

Age Group

Requirement

Select one of the following choices:

- Under age 60
- Age 60 and over
- Unknown

Definition:

Identify the age group of the individual who is a focus of concern or topic of discussion. Select whether the individual is age 60 or over, the individual is under the age of 60 or the age of the individual is not known (select “unknown”). I&A Specialists are not required to ask a person’s age; they are encouraged to use their best judgment and select the most likely option.

Disability Type

Requirement

Select as many as apply:

- Developmental Disability
- Elderly
- Mental Health
- Physical Disability
- Substance Use
- Unknown

Definition:

During conversations the person's disability or characteristics may be revealed. I&A Specialists are not required to ask a person's disability type; they are encouraged to use their best judgment and select the most appropriate options. Select **all** disability types that apply. Unknown may be selected if the individual's disability is not known.

Caller Type (Who Made Contact)

Requirement

Select one of the following choices:

- **Self** (individual contacted the ADRC on their own behalf);
- **Caregiver** (individual caring for the person who is the focus of the contact);
- **Relative, Guardian, Friend/Neighbor, Community member** (individual who is not the caregiver contacted the ADRC on behalf of someone);
- **Agency, Service Provider** (individual contacted the ADRC on behalf of someone else);
- **ADRC Contacted Consumer or their designee** (staff from the ADRC initiated contact with the consumer or their designee on behalf of the consumer in a situation other than for Pre-Admission Consultation);
- **ADRC responded to Pre-Admission Consultation – Nursing Home** (ADRC contacted consumer as a result of a referral from a nursing home);
- **ADRC responded to Pre-Admission Consultation – Community Based Residential Facility** (ADRC contacted consumer as a result of a referral from a CBRF);
- **ADRC responded to Pre-Admission Consultation – Residential Care Apartment Complex** (ADRC contacted consumer as a result of a referral from an RCAC);
- **Other** (select when none of the previous options apply.)

Definition:

Caller Type identifies people who contacted the ADRC either on their own behalf or on behalf of someone else. It also reflects instances when ADRC staff are initiating contact with a consumer or someone on their behalf (e.g., ADRC contacting consumer to provide follow-up). Only *one* category may be selected for a contact.

ADRC Activities

Requirement

Select as many as apply to this particular contact:

- **Provided Information & Assistance**
Provided Information & Assistance includes: listening to the inquirer, assessing his or her needs, helping the inquirer to connect with service providers or gain information to meet the identified needs (e.g., provided assistance locating transportation services, chore services, employment and training options, provided linkages to elder abuse and adults at risk system, referred for benefit counseling, etc).
- **Provided Options Counseling**
Options counseling is an interactive decision-support process whereby consumers are assisted to evaluate and weigh their long-term care service options (e.g., assistance evaluating housing options, assistance sorting through home care and personal care options, helping a person to decide to move or stay in their current residence).
- **Provided Follow-up**
Follow-up is activity initiated by the ADRC, not the consumer or inquirer or service provider, to determine if the inquirer's needs were met and if additional information and assistance are needed (e.g., after the inquirer received information from the I&A Specialist regarding multiple issues, the I&A Specialist contacted the inquirer to learn if he/she has any questions or needs any additional assistance). Note: when providing follow-up, caller type must indicate "ADRC contacted consumer."
- **Administered Long-Term Care Functional Screen**
Long-Term Care Functional Screen is administered. (Note: this indicates long-term care functional screen has been completed.)
- **Referred to Economic Support**
ADRC referred inquirer to the Income Maintenance unit. The I&A Specialist may provide the individual with contact information for the Economic Support unit or assist the inquirer by contacting the Economic Support Unit on their behalf.
- **Provided Assistance with Medicaid Application Process**
ADRC assisted inquirer with activities (e.g., assistance gathering/documenting medical remedial expenses, assistance completing MA application, support to obtain Medicaid Waiver

Programs, Family Care, IRIS, etc.) related to the Medicaid Application Process.

- **Referred for Financial Related Needs Other than Economic Support**
ADRC referred inquirer to agencies/programs that would meet financial related needs (e.g., Salvation Army for rent assistance, Community Action Program for food voucher). The I&A Specialist may provide the individual with contact information for the respective agency or assist inquirer by contacting the agency.
- **Referred for Private Pay Service Options**
ADRC referred inquirer to private pay service options (e.g., home care services, housing options, day services, services and housing packaged together, personal care). The I&A Specialist may provide contact information about the respective agency or assist inquirer by contacting the agency on their behalf.
- **Provided Short-Term Service Coordination**
ADRC served as the “coordinator” of service and the main contact person on behalf of an individual for agencies and others providing services that the individual has chosen. The complexity, diversity and/or quantity of needs and providers necessitate coordination that the individual can not perform and there is no one else who can do so.
- **Provided Youth Transition Support**
ADRC assisted a young adult with disabilities in making the transition from children’s services to the adult long-term care system (e.g., discussion with young adult who has a developmental disability and is 17 years 9 months old and needs support to receive services from the adult long-term care system).
- **Provided Enrollment Consultation**
ADRC assisted an individual who is found eligible for publicly funded long-term care in selecting and enrolling in a publicly funded long-term care program (e.g., Family Care, Partnership, IRIS).
- **Provided Disenrollment Consultation**
ADRC assisted an individual by providing information and counseling to assist a person in the process of voluntarily or involuntarily disenrolling from a publicly funded long-term care program (e.g., Family Care, Partnership, IRIS).
- **Provided Assistance/Referral for Health Promotion or Information**
ADRC provided health related information and/or guidance to an individual. Information may include health promotion, health education, prevention strategies and supports. This area includes intervention/prevention information or services (e.g., connecting individual to a “Living with Chronic Disease” class, sharing information about health screenings, medication management, etc.).

- **Referred for Mental Health Services**
ADRC referred individual to a provider(s) of mental health services. The I&A Specialist may provide contact information or assist by contacting the mental health provider on the individual's behalf.
- **Referred for Substance Abuse Services**
Individual was referred to a provider(s) of substance abuse services. The I&A Specialist may provide the individual with contact information or assist by contacting the substance use service provider on the individual's behalf.
- **Consumer Refused (PAC related)**
The consumer refused interaction with the ADRC upon being contacted by the ADRC.

Definitions:

Each ADRC activity indicates specific key areas of ADRC service provision.