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Date: October 30, 2007

To: ADRC Directors

From: Janice Smith, Director
Office for Resource Center Development

Re: ADRC Activity Reporting for 2008

This memo will provide information regarding the changes in reporting required, reporting categories and definitions and technical specifications for submitting data reports.

Currently only the original nine ADRCs submit activity reports. Those reports focus solely on information and assistance contacts. The data only reflected number of information and assistance (I&A) contacts, presenting issue and contact outcome. The data was aggregated at the local level and submitted monthly.

This new reporting plan will be different in the following ways:

- Beginning in 2008, all ADRCs under contract will be required to report, providing a more accurate picture of statewide ADRC activity.
- ADRCs will be reporting on more than I&A; this new reporting will capture the extent to which ADRCs are assisting individuals in more than 14 activity areas.
- Rather than having summary data, this reporting will be “encounter” based, that is, each ADRC encounter or contact with an individual can be tracked. Many Department systems are converting to encounter reporting.
- ADRCs will not have to complete reports. Instead every quarter, ADRCs will submit their database to the Department’s data warehouse. As a result the Department can analyze the data in a variety of ways and compile reports as needed.
- The new reporting will provide data correlating a specific ADRC activity (I&A, options counseling, etc) with the types of individuals receiving that service (age, disability, etc). This type of data will give a fuller picture of the extent of ADRC activity at the local level.
- Enhanced data will be helpful to maintaining and updating the cost model.

Our intent in developing these new reporting requirements was to strike a balance between obtaining descriptive information with reporting burden. Consequently there are many additional activities that ADRCs may want to capture for local use.

This new reporting system does not incorporate or replace the separate reporting done for the Disability and Elderly Benefit Specialist programs. Nor does it impact the 100% time reporting required to capture federal match. Those reporting systems will continue.

To achieve consistency in reporting, we ask that you pay particular attention to the definitions. Since you will be reporting on each encounter or contact, being clear about what contacts to include will be important.

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 or inquires related to the delivery of direct services are not considered contacts.

Attached are six key documents, the first three apply to all ADRCs:

1. ADRC Activity Reporting Definitions
2. ADRC Assigned Identification Codes
3. Encounter new user request form
4. Encounter Reporting 2.7-ADRC Data Dictionary (for non-Beacon users only)
This will aid in the set-up of your system.
5. ADRC Activity Reporting Data Requirements (for non-Beacon users only)
This provides technical specifications for converting and exporting your data to the Department's data warehouse.
6. ADRC Activity Reporting - Creating xml from xls (for non-Beacon users)

Non-Beacon Users. Those ADRCs using client tracking systems other than Beacon should share the above documents (#4, 5, 6) with your IT department. Direct technical questions to Charles Rumberger, Bureau of Information Technology, DHFS, RumbeCK1@dhfs.state.wi.us.

Beacon Users. The Department is working with Synergy Corporation to revise Beacon to reflect the new 2008 ADRC reporting requirements. ADRCs using Beacon will be able to export a file from Beacon for submission to the Department.

Submitting Data via Encounter Reporting. ADRCs will be required to submit their data using the Encounter Reporting System. For ADRC activity reporting information, go to <http://dhfs.wisconsin.gov/LTCare/Encounter>. Also, review the Encounter implementation guide (scroll to the middle of the list), especially pages 25-34, which contain step by step screen shots to guide you through the process to submit data. Attached is a form to request authorization for staff to certify, purge, submit or view your ADRC encounter data submission.

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Effective Date and Transitions. Please plan to implement these new reporting requirements as of January 2008, with the first quarterly report submitted to the data warehouse by April 30th for the January- February-March reporting period. Given that ADRCs that currently report will have to be changing their systems, existing monthly reports will not be required for the remainder of 2007. If you will not be able to be ready by January to collect the required information, please submit a timeline for when you will be able to start.

We realize that this new reporting process is a change for all ADRCs. It is necessary to make this transition now before further expansion occurs. We appreciate your help as we work through any implementation issues. Send questions to RCteam@dhfs.state.wi.us and we will compile a frequently asked questions document if needed. In addition we will be available to address specific ADRC reporting questions via conference call if requested.

Thanks for your cooperation as we implement our new system.

Attachments (6)

CC: Charles Rumberger, DHFS
2007 ADRC applicants