

RESOURCE CENTERED

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Technical Assistance for Wisconsin Aging and Disability Resource Centers
Department of Health Services, Office for Resource Center Development (ORCD)



Information & Assistance ***Program Development and*** ***Implementation***

This bulletin will offer technical assistance on how to build an information and assistance (I&A) program, including ways to support information and assistance professionals as they strive to be effective in their work.

Information and Assistance is a professional service provided by Aging and Disability Resource Centers (ADRCs). I&A ranges from providing information and responding to requests, to in-depth conversations that take place over time regarding an individual's concerns and challenges. The Alliance of Information and Referral Systems (AIRS) is a professional membership organization that provides credentialing of individuals and ongoing updating of standards for Information and Referral/Assistance organizations. Additional information about AIRS, and the national standards are available on the AIRS website at www.airs.org. WisconsinAIRS is the state affiliate for Wisconsin. Information about WisconsinAIRS is available at the WisconsinAIRS website at www.wisconsinairs.org

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Information and Assistance – Welcome to the Profession!

In order to assist you in the development of your ADRC's Information and Assistance Program, the following documents are included in this bulletin:

1. Build Your I&A Program Planning Guide. Each Aging and Disability Resource Center will develop an I&A program. The I&A program planning guide is designed to assist new ADRCs in preparing for the professional service of Information and Assistance. The guide is a first step in supporting the planning process and a tool for existing ADRCs to use to check their progress of developing this important program. This section provides an introduction to information and assistance software and the Information & Referral Network.

2. I&A Specialist Sample Position Description. Information and Assistance Specialists provide an important service to individuals who contact the ADRC and have a specific role in the ADRC. This role is different from the role of a receptionist or a operator. The sample I&A position description outlines typical duties of an I&A Specialist and demonstrates how this role is different from case management and/or hotline operators. The sample position description is intended to provide information about key functions of the work provided by I&A Specialists and serve as a helpful guide for ADRCs as they develop position descriptions for key staff in the ADRC. This particular position description is geared toward I&A Specialists who assist people by providing information, referral, assistance and decision support via options counseling and counseling regarding publicly funded long-term care options (e.g., enrollment counseling).

This position description does not include specific information about the desired background and professional experience needed. Educational and experience requirements are listed in the ADRC contract. Recruitment efforts are often focused on bringing together a well-rounded team of professionals who have experience with adults with disabilities and older adults. Professional experience in Information & Assistance, occupational therapy, nursing, counseling, discharge planning and social work are some of the work experiences of I&A Specialists working at ADRCs.

3. Sample I&A Orientation materials. Each new staff person that is hired to work in the ADRC should take part in the employee orientation. The orientation materials provided in this section are specifically designed to assist ADRC directors and supervisors in providing a potential framework with suggestions to support the training of a new I&A professional. This particular orientation guide is designed to be used by the I&A specialist not only to keep a record of the various tasks and discussions that took place, but also to document the specialists' thoughts regarding the information learned.

4. Sample I&A Training Needs Survey tools. Information and Assistance professionals bring a wide variety of skills, knowledge and educational background to the profession. The training

survey tools provide an opportunity for the I&A Specialist to take an introspective look at his or her own skills and knowledge and identify areas for continued professional growth and development. There are different ways to implement a training plan. The training plan format provides a place where the documentation of the training plan and approach to each area identified in the survey can be addressed.

5. Featured Topics. Options Counseling, Youth Transitions, Prevention and Enrollment Counseling are four featured topics in this Resource Centered Document. Each of these services are part of a well-developed Information and Assistance Program. Special attention is given to these roles of an Information and Assistance program because they are performed by I&A Specialists but have different knowledge and skills. Some ADRCs market these as separate services within their I&A program, some blend them with their I&A program.

Contact Information

If you have any questions about the materials or information found in this bulletin, contact Maurine Strickland at the Department of Health Services, Office for Resource Center Development, by phone at 608-266-4448 or send an e-mail to: maurine.strickland@wisconsin.gov.



Building Your Information and Assistance Service System

Information and Assistance is a foundation of Aging and Disability Resource Centers. As you build this service you will want to think through key questions, identify resources and decide on next steps that will support the implementation of a robust I&A program. This section of the Resource Centered document is divided into three areas. This first segment is a worksheet that illustrates key questions, resources and references, a section to document next steps, time–line and lead person. The next two sections focus on introductory information about information and assistance software and the broader information and referral network.

Key Questions	Resources & References	Document Next Steps	Timeline	Lead Person
<p>Do you have staff directed to lead the development of your I&A Service?</p>	<p>If no...</p> <ul style="list-style-type: none"> • Review ADRC Contract • Read ADRC Development Information series documents available online at http://dhs.wisconsin.gov/lcicare/Generalinfo/RCs.htm • Become familiar with AIRS National Professional Standards available online at http://www.airs.org/ • Use Sample Position Description for I&A Specialists available on pages 17–19 • Review ADRC Application available online at http://dhs.wisconsin.gov/lcicare/Generalinfo/RCs.htm • Develop I&A implementation plan to hire and train lead I&A staff, using Long–Term Care Options Counseling tool kit 			

Key Questions	Resources & References	Document Next Steps	Timeline	Lead Person
Do you have staff directed to lead the development of your I&A Service ?	<p>If yes...</p> <ul style="list-style-type: none"> • Review requirements for Information & Assistance Specialists in the ADRC Contract • Seek AIRS certification (if the person is not currently certified) • Using technical assistance available develop I&A plan outlining the steps that you will take to develop and implement your I&A program • Assess staff training needs and develop individual training plan; use Long-Term Care Options Counseling tool kit as a basis for training • Does the individual understand the mission of your ADRC and the customer service that is provided? 			
Do you have a computerized resource database ?	<p>If no...</p> <ul style="list-style-type: none"> • Several companies produce resource databases. A bibliography of databases is available online from the National Information & Referral Support Center: http://www.nasua.org/pdf/softwarebibliography2000.pdf 			

Key Questions	Resources & References	Document Next Steps	Timeline	Lead Person
<p>Do you have a computerized resource database continued?</p>	<ul style="list-style-type: none"> • Review BeaconIR demo, the software used by more than 40 counties in Wisconsin. BeaconIR is also customized to produce the State required ADRC Activity report. • Decide on an Inclusion and Exclusion Policy, ADRC database Inclusion and Exclusion policy is available online. • Use established Style Guide. The BeaconIR Style Guide is available online. • Refer to the ADRC contract to support development of a list of services/programs and agencies to include in the database using key information areas outlined in the contract. • Develop plan to train I&A Specialists on use of the software. If you select Beacon, training is available through the Office for Resource Center Development. 			

Key Questions	Resources & References	Document Next Steps	Timeline	Lead Person
<p>Do you have a computerized resource database continued?</p>	<p>If yes....</p> <ul style="list-style-type: none"> • Review resource information to include pertinent information for different target populations • Make sure information is up-to-date (standard - update at least annually) • Do you have an Inclusion/Exclusion Policy in place? • Do you have a Style Guide? • What classification system do you use? AIRS/Infonline Taxonomy? • Are I&A Specialists trained on the use of the I&A Software? 			
<p>Do you have a Receptionist or I&A Specialist Model?</p> <p>Receptionist</p> <ul style="list-style-type: none"> • Triages person to the appropriate staff (I&A, DBS, EBS) 	<p>If you have a Receptionist Model...</p> <ul style="list-style-type: none"> • Is the receptionist trained on the mission of your ADRC? • Is receptionist trained on when to refer people to I&A, EBS or DBS? • Is the receptionist trained on customer service? • Is the receptionist trained on how to deal with difficult situations and unhappy customers? • Do you have a system in place so customers of the ADRC do not receive voice mail when the receptionist is on the phone? • Do you have a system in place to greet customers when the receptionist is away from his/her work area? 			

Key Questions	Resources & References	Document Next Steps	Timeline	Lead Person
<p>I&A Specialist</p> <ul style="list-style-type: none"> • Answers calls directly • Responds to emails and walk-ins • Helps consumer directly, provides necessary follow-up, home visit, etc. <p>Items to consider...</p> <ul style="list-style-type: none"> • Call volume • Staff availability • History of the telephone number • No voice mail • Remember I&A is not intake 	<p>If you have an I&A Specialist Model...</p> <ul style="list-style-type: none"> • Is the I&A Specialist trained on when to refer to his/her colleagues (DBS & EBS)? • Do you have a system in place so customers of the ADRC do not receive voice mail when the I&A Specialist is on the phone? • Do you have a system in place to greet customers when the I&A Specialist is on home visits or away from his/her work area? 			

Key Questions	Resources & References	Document Next Steps	Timeline	Lead Person
<p>Do you have a plan in place to ensure people know your I&A Service is available?</p>	<p>If no....</p> <ul style="list-style-type: none"> • Review the ADRC Contract • Contact currently funded ADRCs and ask for a copy of their marketing plan • Consider hiring a marketing professional to help support the development of a plan. <p>If yes...</p> <ul style="list-style-type: none"> • Review your plan, how is it working? • Evaluate effectiveness and make improvements. 			
<p>Do you have software in place to document interactions with consumers?</p>	<p>If no...</p> <ul style="list-style-type: none"> • Review BeaconIR demo, pay particular attention to the notes section and the ability to track referrals and topics for each individual contacting the ADRC. • Consider assessing staff training needs and formats for note taking. <p>If yes....</p> <ul style="list-style-type: none"> • Are I&A Specialists trained on the use of the software as a format for note taking? • Are you able to use the software to create a consumer record that documents interactions with the I&A Specialist? 			

Key Questions	Resources & References	Document Next Steps	Timeline	Lead Person
<p>Do you have a plan in place to orient staff to the new organization and the role of Information and Assistance?</p>	<p>If no...</p> <ul style="list-style-type: none"> • Consider developing an orientation for all staff. Include how to refer people to the ADRC's Information and Assistance Service. • Consider incorporating an orientation into annual trainings for existing staff and introduction for new staff. • Consider using the ADRC Introductory video during your staff orientation. <p>If yes...</p> <ul style="list-style-type: none"> • Does the training include the mission of the new ADRC? • Does the training include how to refer people to the ADRC's Information and Assistance Service? • Is orientation incorporated into annual trainings for existing staff and introduction for new staff? • Does the training include use of the ADRC video? 			
<p>Is your Information and Assistance Service connected with the broader I&R community?</p>	<p>If no...</p> <ul style="list-style-type: none"> • Consider joining AIRS/WisconsinAIRS and attending the conference. • Develop Memoranda of Understanding with other I&R providers (e.g., Child Care Resource & Referral, Crisis Providers, First Call for Help, 211 call centers etc...). Sample 211 Memoranda 			

Key Questions	Resources & References	Document Next Steps	Timeline	Lead Person
<p>Is your Information and Assistance Service connected with the broader I&R community continued?</p>	<p>If yes...</p> <ul style="list-style-type: none"> • Is your I&A service a member of AIRS/WisconsinAIRS? • Do you have Memoranda of Understanding in place with other I&R providers (e.g., Child Care Resource & Referral, Crisis Providers, First Call for Help, 211 call centers etc)? Sample 211 Memoranda 			
<p>Do you have a plan for how your ADRC will provide options counseling?</p>	<p>If no....</p> <ul style="list-style-type: none"> • Consider that information and assistance may develop into options counseling, so it may be helpful to have the same staff providing both services. Options Counseling is a time intensive process where ADRC staff assist individuals by providing helpful information to evaluate options. Consider what tools will be helpful for customers of the ADRC to use to evaluate options. These tools could include assisted living checklists, guidebooks to support selection of a nursing home or assisted living provider, tips on hiring a personal care worker, locating published information on quality of facilities or institutions, etc. 			

Key Questions	Resources & References	Document Next Steps	Timeline	Lead Person
<p>Do you have a plan for how your ADRC will provide options counseling continued?</p>	<ul style="list-style-type: none"> • Utilize the long-term care options counseling tool kit to provide staff the basics on this service. • Consider using shadowing and mentoring as methods to develop skills in this area. <p>If yes....</p> <ul style="list-style-type: none"> • Do you have a process in place to train new staff and assist them in developing skills necessary to provide effective decision support? • Is shadowing and mentoring common practice in your ADRC? 			
<p>Do you have a plan in place describing how your ADRC would provide enrollment counseling?</p>	<p>If no....</p> <ul style="list-style-type: none"> • Familiarize yourself with the technical assistance documents that describe the enrollment plan and the enrollment counseling process. Enrollment Counseling is a featured topic in this document. • Develop a plan to train staff that will be providing enrollment counseling on the enrollment process, publicly funded long-term care options in your area and use of technical assistance documents to aid in the counseling process. Include use of webcasts in your training plan. 			

Key Questions	Resources & References	Document Next Steps	Timeline	Lead Person
<p>Do you have a plan in place describing how your ADRC would provide enrollment counseling? (continued)</p>	<p>If yes...</p> <ul style="list-style-type: none"> • Is shadowing and mentoring by experienced staff within or from neighboring ADRCs common practice in your ADRC? • Do you have a system in place to ensure that the enrollment counseling is provided in an unbiased way? • How will staff become informed of MCO and ICA operating procedures? • Sometimes individuals will have specific requests for information that will need to come from the MCO(s) or ICA. Do your staff have contact information on the MCO(s) and ICA to provide to consumers? Have you agreed on a protocol as to when staff contact MCO or ICA on behalf of a consumer and when to refer the consumer directly? • Some ADRCs have designated staff who provide enrollment counseling and help people navigate the Medicaid application process; consider if this approach would be helpful at your ADRC. 			

Key Questions	Resources & References	Document Next Steps	Timeline	Lead Person
<p>Do you have a plan in place for your ADRC to assist with youth transitions?</p>	<p>If no....</p> <ul style="list-style-type: none"> • Considering designating a lead staff person working in this area. • Make connections with the school districts, Transition Advisory Councils (TAC), and the Division of Vocational Rehabilitations (DVR) in your area. <p>If yes...</p> <ul style="list-style-type: none"> • Are your partners, the school districts, TAC and DVR familiar with the role of the ADRC? • Do you have established methods for sharing information about the ADRC with teachers, parents and students (e.g., information fairs, printed materials and other marketing efforts)? 			

Section 2 – Information and Referral Network

Aging and Disability Resource Centers are part of a national network of Information and Referral Providers. This national and growing international profession assists people everyday in connecting with services and programs that are helpful to them. Information and Assistance provided by the ADRCs is generally referred to as a “specialized” service. Information and referral providers such as 211 and specialized providers, crisis lines, disease specific information lines, will want to refer people to the local ADRC to get in-depth information about how to decide between programs and services, including decision making in long-term care. Written memorandums of understanding can be a vehicle to articulate referral protocols and clarify differences among the I&R services provided. A [sample MOU](#) is available on the ADRC website. National standards for the profession call for written agreements among agencies in the network. These national standards are available on the Alliance of Information and Referral Systems (AIRS) website www.airs.org. AIRS was incorporated in 1973 to improve access to services for all people through information and referral. Some sections of the United States have established AIRS affiliate organizations; WisconsinAIRS is the affiliate for Wisconsin. Organizations, who become members of AIRS, have the benefit of dual membership with Wisconsin AIRS.

Section 3 – Information and Assistance Software

The Aging and Disability Resource Center will develop and maintain a database to support the delivery of information and assistance. Databases generally have two sections, a resource section where information about services and programs is stored for easy retrieval and a client side of the database where I&A Specialists document conversations that they have with individuals who contact the ADRC. There are several different software packages available for purchase. The most commonly used software is BeaconIR developed by Synergy (now Harmony). One of the advantages to using Beacon is the ability to easily produce the State ADRC Activity Report from the software. Also Beacon can be configured to share information with SAMS, the required software for aging units. By using Beacon, ADRCs which are aging units will not have to double enter required NAPIS reporting information.

The AIRS national standards referenced at the beginning of this document address standards relating to the development and ongoing maintenance of information and assistance software. Standards call for the creation of policies articulating which organizations would be included in the database and which would be excluded. This policy is referred to as the “Inclusion/Exclusion policy.” A workgroup has developed the [inclusion/exclusion policy](#) in use for ADRCs. In addition to inclusion/exclusion policies, the use of a standardized style guide articulating how information is put into the resource side of the database is very helpful. The current version of the [style guide used by ADRCs with Beacon](#) is available online.

Keeping information current in the resource database is an ongoing challenge. Many ADRCs employ various techniques to ensure updates are made at least annually. These techniques include the use of mail, email, fax and a feature to enable provider on-line updating by using AssistGuide software. AssistGuide, through the use of a software product called BeaconWEB, publishes the resource information contained in Beacon to a specific website. This website not only allows individuals to search on their own for services, but allows agencies to update their information online. This updating occurs with the ADRC securing the ability to authorize the updated information prior to it being published on the web.

Multi-county ADRCs will want to consider having resource databases that allow for appropriate sharing of information and service to consumers in their geographic region. Some multi-county ADRCs use one resource data base allowing I&A Specialists in each area to be helpful to people contacting the ADRC without having to call or refer the individual to another ADRC branch office. Generally multi-county ADRCs establish MOUs articulating confidentiality agreements between the respective branch offices.

Information and Assistance Specialist – Sample Position Description

ADRC of _____ COUNTY POSITION DESCRIPTION

Position Title: Information and Assistance Specialist

(Some ADRCs are calling this position an ADRC Specialist)

Position Summary

The purpose of the Information and Assistance Specialist position is to provide the general public, but particularly adults who are elderly or have a disability, with information and assistance to a wide range of community resources; help inform and educate people about their options; assist in connecting them to programs and services, including public and privately funded options.

Essential Duties and Responsibilities

Communication

- Fulfills a customer service role, ensuring that the consumer experiences a welcoming atmosphere and consumer satisfaction is achieved.
- Uses telephone skills (professional greeting, warm tone of voice, courteous and appropriate language) and interviewing techniques using active listening skills (over the phone, in-person and via email), to build rapport with an unhurried attitude.
- Performs home visits at a time and place that best meets the consumer's schedule.
- Gathers sufficient information to accurately identify and clarify inquirer's problems and needs, explores needs beyond the presenting problem, looking at short and long term solutions, checking in with the inquirer and summarizing what they are requesting.
- Searches through the Information and Assistance resource database, as well as other written and computer-based information resources to identify, evaluate and suggest potential programs and services.
- Is creative in finding options, provides inquirer several options but helps to prioritize instead of overwhelm, gives specifics on eligibility and process to apply for services and resources.
- If appropriate, assists individual in connecting with a resource if they are unable; provides advocacy
- As needed, researches additional or alternative resources.

- Provide information about programs, services (public and private) and public benefits, make referrals and, when needed, helps consumer get connected to appropriate services.
- Constructs and communicates an effective consumer driven action plan.
- Provides short-term service coordination according to ADRC policy.
- Provide follow up as needed to determine outcomes and provide additional assistance in locating resources and arranging services.
- Provides information about publicly funded long-term care and assists consumers throughout the eligibility determination and enrollment process.
- Assists individual in completing Medicaid application and other public benefit programs (e.g., Foodshare), if needed.
- Collects preliminary financial data (including medical and remedial expenses) and refers to Economic Support Unit for financial eligibility determination.
- Participates in various transition activities designed to help youth who have a disability transition from school to the adult service system.
- Participates in program development, marketing and outreach activities including representing the ADRC at public information fairs.

Documentation and Quality Assurance

- Maintains accurate and complete documentation in a timely fashion with complete notes in the I&A database that contain accurate information without judgment.
- Participates in prevention activities, support groups, classes and other initiatives.
- Administers the Long Term Care Functional Screen to determine functional eligibility.
- Completes required recordkeeping and ADRC activity reporting and 100% time reporting in a timely manner.
- Participates in Quality Assurance/Quality Improvement projects and activities.
- Arranges work schedule as necessary or directed to meet the program and consumer service needs.
- Represents ADRC of _____County to the community at large through professional interaction, public speaking, media presentations, and participation in community advisory groups as requested.

Professional Growth and Development

- Participates in staff meetings and training activities.
- Complies with applicable federal and state laws, administrative rules, established agency procedures and accepted professional standards.
- Participates in on-going training, maintaining current knowledge to ensure compliance with federal and state regulations.
- Adheres to the AIRS national standards; also secures AIRS certification within one year.
- Maintains the confidentiality of client information as required by State and Federal laws and regulations and professional practice standards.

Qualifications

Skills and Abilities

- Ability to organize work
- Ability to relate to older people and people with disabilities and assess their needs
- Ability to deal tactfully with difficult situations
- Ability to establish priorities for service intervention
- Ability to work as a team player
- Ability to proficiently use a computer and related office equipment; demonstrating familiarity with required software and database programs
- Ability to communicate effectively to a variety of types of persons both individually and in groups
- Ability to communicate effectively, both orally and in writing

Experience and Education

- Please refer to the ADRC contract for specific information regarding minimum education, experience requirements. ADRCs may choose to establish criteria (e.g., education, experience with target populations, additional certifications) above the minimum requirements articulated in the contract.

***Aging and Disability Resource Center I & A Checklist:
An Orientation Guide for I&A Specialists***

This helpful checklist is designed to support new I&A Specialists learn about the ADRC, the profession of Information & Assistance, the systems the Specialist will use on the job and their community resources. ADRCs are encouraged to customize this document to reflect their ADRC and their community.

Orientation	Date	Comments
Section 1 – Welcome to the ADRC		
Mission of the ADRC		
Services of the ADRC		
Organizational Chart		
<ul style="list-style-type: none"> • Other I&A Specialists • Disability and Elder Benefits Specialists 		
Key Partners		
Confidentiality		
Schedules		
Staff meetings		
Section 2 – Welcome to the Profession		
Role of the I&A Specialist		
<ul style="list-style-type: none"> • I&A and Options Counseling • Enrollment Counseling 		
National Standards		
National Certification		
Advocacy		
Shadowing and mentoring plan		

Section 3 – Learn about Systems		
Telephone system		
Assistive technology for communication (TTY etc...)		
Interpreters		
Translators		
Resource Database <ul style="list-style-type: none"> • Inclusion and Exclusion Policy • Printed materials 		
Program Participation System (PPS)		
Long-term Care Functional Screen (LTCFS)		
Client Assistance for Re-employment & Economic Support (CARES)		
Medicaid Management Information System (MMIS)		
ADRC Activity Reporting		
Federal Match 100% time reporting		
Section 4 – Know Your Community Resources (The sample listing provided below, please customize for your own use.)		
Adults at Risk		
Aging Unit		
Assisted Living		
Assistive Technology		
Center for Independent Living		
Disease Specific Resources		
Durable Medical Equipment		
Employment Supports/Services		
Food Pantries		
Home Care providers		
Housing options		
Income Maintenance/Economic Support		
Independent Living Center		

Long-term Care Services (public & privately funded)		
Medical Providers		
Mental Health Services		
Nursing Homes		
Personal Care providers		
Prevention		
Substance Abuse Agencies		
Support groups		
Transportation - Specialized		

Information and Assistance Training Needs Survey

This survey has three sections. The first section focuses on key knowledge areas, the second on skills and the third targets populations served by the ADRC. The survey tool is meant to provide direction in setting up in-services, trainings, shadowing and mentoring activities to support the growth and development of I&A professionals. ADRCs are encouraged to customize this document for their own use.

Section 1: Key Knowledge Area

Key knowledge area	Rate your knowledge from 1 (low) to 5 (high)	Comments
Advanced Directives		
Aging Process		
AIDS		
Chronic Diseases		
Americans with Disabilities Act		
Community services		
Crisis intervention		
Cultures - understanding		
Disability		
Employment		
Employment Incentive Programs		
Energy Assistance		
Food assistance programs		
Funeral services		

Geriatric Assessments		
Guardianship		
Hearing Impairments - programs, resources		
HIPPA		
Home Health Care		
Hospice		
Hospitals		
Housing - Options		
Legal Assistance		
Listening Skills		
Medical Assistance Programs		
Medical Clinics		
Medical Equipment		
Medicare, A, B, C, and D		
Medicaid, Medicaid Assistance Purchase Plan		
Medications		
Mental Health Needs/Services		
Prevention		
Prescription Programs		
Probate		
Recreation		

Rehabilitation		
Respite Care		
Social Security, SSI SSI-E		
Support Groups		
Transportation services		
Veteran Services		
Vision Impairments - programs, resources		
Volunteer Opportunities		
Weatherization		
Other		

Section 2: Key Skill Area

Key Skill Area	Rate your skill from 1 (low) to 5 (high)	Comments
1. Active listening		
• Paraphrasing - restating		
• Reflecting		
• Summarizing		
• Giving Feedback		
• Emotional labeling		
• Probing		

• Validation		
• Effective pause		
• Silence		
• “I” messages		
• Redirecting		
2. Assessment tools		
• ADLS		
• IADLS		
• Prevention tools		
• Dementia screening		
• Depression screening		
• Long-term Care Functional Screen		
• Caregiver risks		
• Other		
3. Interviewing		
• Emotional situations		
• Family dynamics		
• Family meetings		
• Other		
4. Target Population Knowledge		
Adults with disabilities		
• Physical Disabilities		
• Amputation		
• Brain Injury (onset age 21 or later)		
• Spinal Cord Injury		
• Mobility Issues		
• Multiple Sclerosis		
• Muscular Dystrophy		

• Polio		
• Other		
Developmental Disabilities		
• Mental Retardation		
• Traumatic Brain Injury (onset prior to age 21)		
• Cerebral Palsy		
• Epilepsy		
• Autism		
• Other		
Older adults		
• Disease Specific		
• Alzheimer's and related Dementia		
• Parkinson's		
Mental health		
• Mental Illnesses		
• Crisis Intervention		
• Family support issues		
• Recovery		
• Other		
Substance use disorders		
• Alcoholism		
• Chemical dependency		
• Family support issues		
• Recovery		
• Other		
Caregivers		
• Long-distance care giving		
• Caregiver assessment		
• Support options		
• Other		

Featured Topics

The following special topics are highlighted at this time to provide additional information about the various ways Information and Assistance Specialist professionals help adults with disabilities and older adults.

Options Counseling

Long-term care options counseling is an extension of the I&A process. This service is focused on consumer education and is often provided when an individual is planning for or currently experiencing a life change. These life changes may include surviving a traumatic event such as a car accident, a medical event such as a stroke or the transition from school-based services to programs for adults with disabilities.

Options counseling is a decision-support process whereby consumers are assisted to evaluate and weigh their long-term care service options. Examples of decision support include assistance evaluating housing options, assistance sorting through home care and personal care options, as well as helping a person decide to move or stay in their current residence. To be effective in providing this service, it is important to take the time needed to fully understand each individual's strengths, and preferences as well as needs. In order to ensure continuity in service delivery, options counseling can be provided by the same I&A Specialist that began the discussion with the individual.

Youth Transitions

Most young adults with disabilities who receive special education services in school can benefit from information available from an ADRC. Providing assistance to them, as well as their teachers and their families is an essential part of Youth Transitions, (a specialized component of the ADRC information and assistance service). In order to plan effectively, people need information about the options available to them. Young adults with long-term care needs may need help learning about, and/or support obtaining, publicly funded long-term care services in their area. Some individuals may need to be referred to a Disability Benefit Specialist for disability determination. Others may not qualify for publicly funded long-term care and need help locating information or getting assistance with employment, education, housing, guardianship, etc.

Young adults (including those who advise and support them) will want to learn about the array of options that do/will exist when the student leaves school. Linkages with the school personnel, local coordinating councils (Transition Advisory Councils – TAC), and the Division of Vocational Rehabilitations (DVR) will be critical to spreading the word about the ADRC. Many ADRCs give presentations to school personnel and parent groups and participate in information fairs coordinated by schools for the purpose of educating parents and youth about the variety of community-based services and programs in their area.

Prevention

As Information and Assistance Specialists meet with adults with disabilities, older adults, and their families, they identify ways in which individuals can take full advantage of different prevention opportunities. As they work with people, specialists need to be aware of what to look for in order to learn about individual concerns and how these affect overall health and wellness (e.g., nutrition, physical activity). Specialists will also need to have current information about education and other prevention initiatives in their communities and will need to support people in accessing this information. ADRCs often lead or participate in the implementation of prevention education and other prevention activities for their community. These include efforts to support prevention of falls, seizures, head injuries, frequent hospitalizations and emergency room visits, as well as providing education about living with chronic conditions, family caregiver support programs and evidenced-based programs.

Enrollment Counseling

One of the roles of the ADRC is to support individuals who are eligible for publicly funded long-term care to learn about their choices and assist them in accessing the program selected. Enrollment counseling is often part of the work of the I&A Specialist. It is important to note that approximately 80% of all contacts made to the ADRC do not result in a referral for publicly funded long-term care. I&A Specialists providing enrollment counseling need to be well versed in the managed care long-term care options like Family Care and Partnership as well as IRIS, the new self-directed supports waiver, and services obtained by using the Medicaid card. This counseling occurs with individuals who are eligible for publicly funded long-term care, therefore I&A Specialists need to understand eligibility requirements as well as processes. The knowledge of the I&A Specialist in this area will be key to supporting the individual successfully through the eligibility process. Functional eligibility is determined by the ADRC through use of the Long-Term Care Functional Screen. Financial eligibility occurs through the local income maintenance unit in each county.

Ageing and Disability Resource Centers together with Long-term Support (LTS) Units are charged with the responsibility to provide enrollment counseling. During enrollment counseling, staff from the ADRC and LTS agencies educate people about the available long-term care options. Through this process an individual decides which option is best for him/her.

The following list provides helpful information about how staff can prepare to provide enrollment counseling.

- Read the Resource Centered Enrollment Counseling technical assistance document located on the ADRC website: <http://dhs.wisconsin.gov/ltcare/Generalinfo/RCs.htm>
- Watch the webcast on enrollment counseling: <http://dhs.wisconsin.gov/ltcare/Generalinfo/Webcast/adrcwebcastLTCEnroll.HTM>

- Familiarize yourself with the benefit packages
 - Family Care
 - Partnership/PACE
 - IRIS
- Learn about the organizations that will be authorizing or coordinating publicly funded long-term care in your area. Invite representatives from the Managed Care Organization (MCO) and from the IRIS Independent Consultant Agency (ICA) to your office to share information about their organization and approach to the delivery of services.
- Learn about and understand appeals and grievance procedures for each organization.
- Familiarize yourself with the financial implications that may impact the individual's decisions. Understand and be prepared to explain:
 - Co-pay
 - Cost share
 - Estate recovery

The Medicaid handbook provides helpful information: <http://www.emhandbooks.wi.gov/imm/imm.htm>

- Learn the enrollment process by reviewing and discussing your ADRC enrollment plan.
- Learn the systems and steps taken to utilize centralized enrollment processes.
- Develop a packet of information to take to home visits. Include materials from the Enrollment Counseling technical assistance documents, MA application, member handbooks, brochures and other publications.

ADRCs and LTS agencies are encouraged to develop a plan for how to train staff so they are comfortable talking with consumers about these new programs. The plan may include such things as:

- Discussing any of above material at a staff meeting
- Role play enrollment counseling at a staff meeting
- Shadowing a someone (even if in a neighboring ADRC) who is experienced in enrollment counseling
- Have two staff do home visits as a team: one has the lead, the other gives feedback.
- Having co-workers, supervisor or experienced enrollment counselor mentor staff new to the activity.

If you have questions contact the Office for Resource Center Development at DHFSRCTeam@wisconsin.gov.