**APS and ADRC New Staff Orientation**

**to**

**Adult Protective Services**

**Name \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_Date of Hire \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

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|  |  |  |  |  |
| **TOPIC** | **Provided by** | **Supporting documentation or links** | **Completed** | **Date** |
| ***Timesheets*** |  |  *Timesheet template**Timesheet codes*   |  |  |
| ***Communication Technology**** ***Outlook Training***
* ***Google calendar***
 |  | * *Outlook Email System Set-up & Instructions*
* *Set up and invite staff*
 |  |  |
| ***Overview of ADRC Services**** ***Information & Assistance***
* ***Options Counseling***
* ***Youth Transition***
* ***Health and Wellness***
* ***Enrollment into Publicly Funded LTC***
* ***Benefits Counseling***
* ***Short Term Service Coordination***
* ***Emergency Response***
* ***Prevention***
 |  | *Status Report**ADRC website* |  |  |
| ***Overview of APS services**** ***Consultations***
* ***Investigations***
* ***Guardianships***
* ***Short-term case management***
* ***Safety planning***
* ***Legal Interventions***
* ***I-team***
* ***Protective placement reviews***
 |  | * *I-team mission statement*
* *Purpose of an I-team*
* *I-team accomplishments*
 |  |  |

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| ***Elder and Adult-at-Risk Reporting System**** ***Mandated reporting***
* ***County systems of APS***
 |  | *Policy Manual: Introduction**State Statutes:*[Wisconsin Legislature: 46.90](https://docs.legis.wisconsin.gov/statutes/statutes/46/90) *&*[Wisconsin Legislature: 55.043](https://docs.legis.wisconsin.gov/statutes/statutes/55/043)*Other county APS contact info:*[*www.dhs.wisconsin.gov/aps/ear-agencies.htm*](http://www.dhs.wisconsin.gov/aps/ear-agencies.htm)  |  |  |
| ***Intake**** ***Overview of SAMS***
* ***Reports received directly***
* ***Reports received via I&A***

 Additional info they can provide |  | * *Policy Manual-intake*
* *Sample SAMS forms*
* *Intake forms*
* *AAR Addendum Questionnaire (policy manual)*
* *Sample CARES/ Forward Health screens*
* *Sample functional screen*
 |  |  |
| ***Law Enforcement Agencies**** ***Sheriff***
* ***Monroe PD***
* ***Brodhead PD***
* ***New Glarus PD ½***
* ***Albany PD ½***
* ***Monticello PD ½***
* ***Belleville PD ½***
* ***Brooklyn PD ½***

 |  |  *ADD Law Enforcement websites and/or contacts* |  |  |
| ***Sources of additional information on a report**** ***WiCCAP***
* ***Land records***
* ***Red files/ file #s***

*Tour file room* |  | *WiCCAP:*[*https://wcca.wicourts.gov/index.xsl*](https://wcca.wicourts.gov/index.xsl)*Land records:**Add weblink* |  |  |
| ***Information on Individuals at Risk*** |  | *DHS PowerPoint:*[www.dhs.wisconsin.gov/aps/abuserisk101.pdf](http://www.dhs.wisconsin.gov/aps/abuserisk101.pdf) |  |  |
| ***Confidentiality*** |  | *DHS document:*[www.dhs.wisconsin.gov/aps/confidentiality.pdf](http://www.dhs.wisconsin.gov/aps/confidentiality.pdf) *Records request see policy manual* |  |  |
| ***Advance directive basics*** |  | *GWAAR publication:*[Guardianship Support Center Resources (gwaar.org)](https://gwaar.org/guardianship-resources) |  |  |
| ***Power of Attorney for Healthcare basics*** |  | *GWAAR publication:*[Guardianship Support Center Resources (gwaar.org)](https://gwaar.org/guardianship-resources) |  |  |
| ***Power of Attorney for Finances basics*** |  | *GWAAR publication:*[Guardianship Support Center Resources (gwaar.org)](https://gwaar.org/guardianship-resources) |  |  |
| ***Guardianship of the Person basics*** |  | *GWAAR publication:*[Guardianship Support Center Resources (gwaar.org)](https://gwaar.org/guardianship-resources) |  |  |
| ***Guardianship of Estate basics*** |  | *GWAAR publication:*[Guardianship Support Center Resources (gwaar.org)](https://gwaar.org/guardianship-resources) |  |  |
| ***Protective Placement basics*** |  | *GWAAR publication:*[www.gwaar.org/images/stories/GSC/StandardsforPP.pdf](http://www.gwaar.org/images/stories/GSC/StandardsforPP.pdf)*DHS publication:*[*https://www.dhs.wisconsin.gov/publications/p2/p20460a.pdf*](https://www.dhs.wisconsin.gov/publications/p2/p20460a.pdf) |  |  |
| ***MCO basics*** |  | *DHS publication:*[www.dhs.wisconsin.gov/familycare/mcos.htm](http://www.dhs.wisconsin.gov/familycare/mcos.htm) |  |  |
| ***Roles and Responsibilities*** |  | *DHS publication:*[www.gwaar.org/images/stories/GSC/RolesResponsibilitiesGuardianAPSMCO\_2017.pdf](http://www.gwaar.org/images/stories/GSC/RolesResponsibilitiesGuardianAPSMCO_2017.pdf)  |  |  |
| ***MCO agencies in County****Attend a meeting for each MCO* |  | *Add MCO website links* |  |  |
|  ***County Partners**** **Corporation counsel**
* **Economic Support**
* **Mental Health Unit**

 *Mobile Crisis** **AODA unit** *Drug Court*
* **CCS*-****Community Support Services*
* **CSP-***Community Support Program*
* **CYF***-child, youth and families*
* **CVSO-***county veterans services officers*
 |  | *Relevant brochures* |  |  |
| ***Protective Placement Monitoring*** |  | * *Sample Report*
* *Notification of Transfer*
* *Notification of Rights*
* *Current list of locations*
* *Termination letter*
 |  |  |
| ***Supporting Guardians**** ***Annual Reports***
* ***Register in Probate***
* ***Resignations***
 |  | * *WI Guardianship Support Center:*

[Guardianship Support Center Resources (gwaar.org)](https://gwaar.org/guardianship-resources)*Guardianship Handbook** [*https://marketplace.wisbar.org/store/products/publications/gc0078a-understanding-guardianships-a-handbookpack-of-25/c-25/c-84/p-17500#17500*](https://marketplace.wisbar.org/store/products/publications/gc0078a-understanding-guardianships-a-handbookpack-of-25/c-25/c-84/p-17500#17500)
* *Guardian Resignation form*
 |  |  |
| ***Filing for Guardianship**** ***Target Groups***
* ***Person vs Estate***
* ***Temp vs Permanent***
* ***Eligible guardians***
* ***POAs***
* ***Estate vs Payee***
* ***Rights***

 ***How to read the legal forms**** ***GAL vs adversary***
* ***Fees (GAL and corporate)***
* ***Standby and Co-guardians***
* ***Notification (lexis nexis)***
* ***Timelines***
* ***Successors***
* ***Spendthrift***
 |  | * *Filing for guardianship*
* *Wisconsin Circuit Court Forms:*

[*www.wicourts.gov/forms1/circuit/index.htm*](http://www.wicourts.gov/forms1/circuit/index.htm)* *Report of Examining Physician/ Psychologist*
* *Information sheet*
* *Statement of Acts*
* *Oath and Bond*
* *Affidavit of Service*
* *Letter to dr for hearing*
* *Spendthrift statement*
* *GWAAR publication: Process for establishing guardianship:*

[*http://gwaar.org/images/stories/GSC/Dec2014TheProcessforEstGuardianshipAdult.pdf*](http://gwaar.org/images/stories/GSC/Dec2014TheProcessforEstGuardianshipAdult.pdf)* *SSA payee:*

 [*www.ssa.gov/payee/*](http://www.ssa.gov/payee/) |  |  |
| ***Reading Court Documents*** |  | * *Letters of Temporary Guardianship*
* *Determination and Order*
* *Letters of Guardianship of the Person*
* *Letters of Guardianship of the Estate*
 |  |  |
| ***Filing for Protective Placement**** ***Emergency***

*Criteria, timelines, law enforcement** ***Non-emergency***

*Reports, timelines* |  | * *SafteyNetWorks Memo EPP:*
* [*www.dhs.wisconsin.gov/aps/sn16formgn4000.pdf*](http://www.dhs.wisconsin.gov/aps/sn16formgn4000.pdf)
* *EPP forms*
* *Sample Comprehensive Evaluation*
 |  |  |
| ***Protective Services**** ***Reasons for***
* ***Criteria***
* ***Reporting***
 |  | * *Dr. report psychiatric meds*
* *State statute: annual report for med order*

[*http://docs.legis.wisconsin.gov/document/statutes/55.19*](http://docs.legis.wisconsin.gov/document/statutes/55.19) |  |  |
| ***Corporate Guardianship****Meet corporate guardians* |  | * *DHS corporate guardianship home:*

[*https://www.dhs.wisconsin.gov/regulations/guardianship/introduction.htm*](https://www.dhs.wisconsin.gov/regulations/guardianship/introduction.htm)* *List of corporate guardians*

[*https://www.dhs.wisconsin.gov/regulations/guardianship/corp-guard-name.pdf*](https://www.dhs.wisconsin.gov/regulations/guardianship/corp-guard-name.pdf) |  |  |
| ***AAR Restraining Orders**** ***Criteria***
* ***Timeline***
* ***Hearings***
* ***GAL***
 |  | * *TRO forms*
 |  |  |
| ***Reviewing Conduct of Alternate Decision-Makers**** ***Order to show cause***
* ***Review of Conduct***
* ***Review of Performance of Duty***
 |  |  |  |  |
| ***Medicare**** ***Difference between Medicaid***
* ***Generally what it covers***
* ***Part A and B***
* ***Who is eligible***
* ***How is it paid for***
* ***Advantage plans***
* ***Part D***

*Meet with EBS* |  | *Center for Medicare & Medicaid: Services (CMS) fact sheet*[*https://www.cms.gov/Medicare/Medicare-General-Information/MedicareGenInfo/index.html*](https://www.cms.gov/Medicare/Medicare-General-Information/MedicareGenInfo/index.html)*What is Medicare?:*[*https://www.medicareresources.org/basic-medicare-information/what-is-medicare/*](https://www.medicareresources.org/basic-medicare-information/what-is-medicare/) |  |  |
| ***Medicaid (MA)(Badgercare)**** ***Types of MA***
* ***Eligibility***
* ***What it covers***
* ***Estate Recovery***

*Meet with ADRC Coordinator* |  | *Applying for Medicaid document**Various brochures from the Long Term Care Project:*[ForwardHealth: Apply for Benefits | Wisconsin Department of Health Services](https://www.dhs.wisconsin.gov/forwardhealth/apply.htm) |  |  |
| ***Veterans’ Benefits**** ***Federal***
* ***State***
* ***County***

*Meet CVSO Officers,** ***Service Connectedness***
* ***Aid and Attendance***
* ***Income-based pension***
* ***Veteran Homes***
 |  | *US Department of Veteran Affairs:*[*https://www.va.gov/*](https://www.va.gov/)*Wisconsin Department of Veteran Affairs:*[*http://dva.state.wi.us/Pages/benefitsClaims/BenefitsandClaims.aspx*](http://dva.state.wi.us/Pages/benefitsClaims/BenefitsandClaims.aspx)*County Veteran Services Officers:*[*http://wicvso.org/*](http://wicvso.org/) |  |  |
| ***Long-term care**** ***Process for enrollment***
* ***IRIS vs. MCO***
* ***Functional Screen***
* ***Nursing home vs. non-NH level of care***

*Meet with ADRC Coord* |  | *Wisconsin Department of Health Services—IRIS:*[*https://www.dhs.wisconsin.gov/iris/index.htm*](https://www.dhs.wisconsin.gov/iris/index.htm)*ADRC document—nursing home vs. non-nursing home level of care:*[*https://www.dhs.wisconsin.gov/publications/p0/p00088p.pdf*](https://www.dhs.wisconsin.gov/publications/p0/p00088p.pdf) |  |  |
| ***Other ADRC Funding Sources**** ***Supportive Home Care***
* ***Caregivers***
* ***Ackerman Trust***
 |  | *SHC Policy**Meet with ADRC Coordinator* |  |  |
| ***Other Charitable Funding***  |  | * *Monroe Fund Application*
* *St. Vincent De Paul Applic*
* *Meet Salvation Army coordinator*
 |  |  |
| ***Social Security**** ***Disability (SSDI)***

*Meet with DBS,* * ***Supplemental Security Income (SSI)***
* ***Retirement (SSA)***

*Meet with payee,* |  | *Social Security Administration (SSA)**Types of Beneficiaries:*[*https://www.ssa.gov/oact/progdata/types.html*](https://www.ssa.gov/oact/progdata/types.html)*SSA FAQs—SSI:*[*https://faq.ssa.gov/link/portal/34011/34019/ArticleFolder/422/Supplemental-Security-Income-SSI-*](https://faq.ssa.gov/link/portal/34011/34019/ArticleFolder/422/Supplemental-Security-Income-SSI-) |  |  |
| ***Local Health Providers*** |  | *Add listing of clinics* |  |  |
| ***Information regarding dementias**** ***Overview***
* ***Types***
* ***Communication***
* ***Stages***
* ***Behaviors***

*Meet with Dementia Care Specialist.* * ***View Teepa Snow videos***
 |  | *Alzheimer’s Association—What is dementia?:*[*https://www.alz.org/what-is-dementia.asp*](https://www.alz.org/what-is-dementia.asp)*Alzheimer’s Association—Types of Dementias:*[*https://www.alz.org/dementia/types-of-dementia.asp*](https://www.alz.org/dementia/types-of-dementia.asp)*Alzheimer’s Association--Brain Tour:*[*https://www.alz.org/braintour/enews\_signup.asp*](https://www.alz.org/braintour/enews_signup.asp)*Alzheimer’s Association—Communication:* [*https://www.alz.org/care/dementia-communication-tips.asp*](https://www.alz.org/care/dementia-communication-tips.asp)*Alzheimer’s Association—Caregiver Center:*[*https://www.alz.org/care/dementia-communication-tips.asp*](https://www.alz.org/care/dementia-communication-tips.asp) |  |  |
| ***Information regarding Traumatic Brain Injuries**** ***Overview***
* ***Symptoms***
 |  | *Traumatic Brain Injury.com—Understanding Brain Injury:*[*http://www.traumaticbraininjury.com/understanding-tbi/*](http://www.traumaticbraininjury.com/understanding-tbi/)*Traumatic Brain Injury.com—Symptoms of TBI:*[*http://www.traumaticbraininjury.com/symptoms-of-tbi/*](http://www.traumaticbraininjury.com/symptoms-of-tbi/) |  |  |
| ***Information regarding Intellectual Disabilities*** |  | *DHS—Developmental Disability Programs and Information:*[*https://www.dhs.wisconsin.gov/disabilities/dd.htm*](https://www.dhs.wisconsin.gov/disabilities/dd.htm) |  |  |
| ***Information regarding Severe and Persistent Mental Illness*** |  | *SAMSHA publication:*[*https://nrepp.samhsa.gov/Docs/Literatures/Behind\_the\_Term\_Serious%20%20Mental%20Illness.pdf*](https://nrepp.samhsa.gov/Docs/Literatures/Behind_the_Term_Serious%20%20Mental%20Illness.pdf) |  |  |
| ***Hoarding**** ***Overview***
* ***Visit Health Hazards***
 |  | *UW Health topics-Hoarding Disorder*[*https://www.uwhealth.org/health/topic/special/hoarding-disorder/abq2245.html*](https://www.uwhealth.org/health/topic/special/hoarding-disorder/abq2245.html) |  |  |
| ***Infestations**** ***Bed bugs***
* ***Fleas***
* ***Lice***
 |  | *EPA Bed Bugs: Get them out and keep them out:*[*https://www.epa.gov/bedbugs*](https://www.epa.gov/bedbugs)*Healthline. Answers to your questions about fleas:*[*https://www.healthline.com/health/fleas#fleabites4*](https://www.healthline.com/health/fleas#fleabites4)*CDC-Head Lice-General Information FAQs:*[*https://www.cdc.gov/parasites/lice/head/gen\_info/faqs.html*](https://www.cdc.gov/parasites/lice/head/gen_info/faqs.html) |  |  |
| ***Universal Precautions*** |  | *Washtena County Public Health fact sheet, Universal Precautions:*[Universal-Precautions-PDF (washtenaw.org)](https://www.washtenaw.org/DocumentCenter/View/5353/Universal-Precautions-PDF) |  |  |
|  ***County Circuit Court**** ***Judges***
* ***Commissioners***
* ***Meet Corp Counsel***
* ***Register in Probate***
* ***Tour Justice Center***

*Hearing rooms (who sits where)**Meeting rooms** ***Attend a hearing***
 |  |  |  |  |
| ***Testifying**** ***How, what to bring, for what purpose, and what to wear***
 |  | * *Corp counsel’s question list*
 |  |  |
| ***Legal terms*** |  | *NY Courts.gov Glossary of Common legal terms:*[Glossary of Terms | NYCOURTS.GOV](https://ww2.nycourts.gov/COURTS/nyc/criminal/glossary.shtml)*Legal Dictionary, Law.com*[*http://dictionary.law.com/*](http://dictionary.law.com/) |  |  |
| ***Mental Health Commitments (Chapter 51s)(Emergency Detentions/ EDs)**** ***Mobile Crisis team***

*Attend a meeting** ***Purpose***
* ***Criteria***
* ***Process of a Ch 51***
* ***3-party petitions***
* ***Collaboration with the Mental Health Unit***

*Meet with Mental Health Unit Supervisor** ***Placements***
* ***Conversions***
 |  | * *§51.15 Wis. Stats.:*

[*https://docs.legis.wisconsin.gov/statutes/statutes/51/15?view=section*](https://docs.legis.wisconsin.gov/statutes/statutes/51/15?view=section)* *Civil Commitment and Voluntary Treatment:*

[ib\_civilcommit\_sm\_2019\_10\_01 (wisconsin.gov)](https://docs.legis.wisconsin.gov/misc/lc/issue_briefs/2019/health_and_mental_health/ib_civilcommit_sm_2019_10_01)*3-Party Petition forms** *Winnebago Mental Health Institute:*

[*https://www.dhs.wisconsin.gov/winnebago/index.htm*](https://www.dhs.wisconsin.gov/winnebago/index.htm)* *§51.20(1)(am):*

[*https://docs.legis.wisconsin.gov/document/statutes/51.20(1)(am)*](https://docs.legis.wisconsin.gov/document/statutes/51.20%281%29%28am%29) |  |  |
| ***Psychotropic medications*** |  | *Psychotropic Medication Chart:*[QUick refernce to psychotropic medications.pdf (michigan.gov)](https://www.michigan.gov/-/media/Project/Websites/lara/bchs/Folder7/4b_Rationale_Strategies_hand_out.pdf?rev=15e1610953f847ffb2fe6d40ee74204b) |  |  |
| ***Alcohol and Other Drugs**** ***Services Available***
* ***Overview of efforts being made on the Heroin Committee***

*Meet with AODA supervisor* |  | * *List of AA and NA meetings*
* *Drug Drop boxes*
 |  |  |
| ***Aging Services in the ADRC**** ***Home-delivered meals***
* ***Congregate Meals***
* ***Driver Escort***
* ***Shuttles***
* ***Adult Day Care***
* ***Volunteers***
* ***Newsletter***

*-Meet with secretary, –Meet with Aging Coordinator,* * ***Prevention***

*Meet with Prevention Specialist,* |  | *Relevant Brochures* |  |  |
| ***Local Senior Center*** |  | * *Latest Senior Center Newsletter*
 |  |  |
| ***County Nursing Home****Meet social workers* |  | *Phone list* |  |  |
|  ***County Health Department*** |  | *Health Dept website:* |  |  |
| ***Jobs and Housing*** |  |  *County Human Services website, Resources:* |  |  |
| ***Sign up for the APS listserv*** |  | *Email Jayne Mullins:*  |  |  |
| ***County Health Services****Meet the social worker* |  |  |  |  |
| ***Local Nursing Homes****Meet the Social Workers* |  |  |  |  |
| ***I team Current Projects**** ***World Elder Abuse Awareness Day***
* ***Case Presentation***
 |  | *Past WEAAD project information* |  |  |
| ***Documentation*** |  | *TBD* |  |  |
| ***WITS Reporting*** |  | *WITS training and log in:*[Adult Protective Services: Wisconsin Incident Tracking System Reporting | Wisconsin Department of Health Services](https://www.dhs.wisconsin.gov/aps/wits.htm) |  |  |
| ***Division of Quality Assurance**** ***What areas they cover***
* ***What they investigate***
* ***How to lodge a complaint***
* ***APS and DQA***
* ***Caregiver misconduct registry***
 |  | * *Division of Quality Assurance:*

[*https://www.dhs.wisconsin.gov/dqa/index.htm*](https://www.dhs.wisconsin.gov/dqa/index.htm)* *How to make a complaint:*

[*https://www.dhs.wisconsin.gov/guide/complaints.htm*](https://www.dhs.wisconsin.gov/guide/complaints.htm)* *Caregiver Misconduct Registry:*

[*https://www.dhs.wisconsin.gov/caregiver/misconduct.htm*](https://www.dhs.wisconsin.gov/caregiver/misconduct.htm) |  |  |
| ***Ombudsman**** ***Purpose***
* ***Areas covered***
* ***Contact info***
 |  | *Ombudsman Program:*[BOALTC Ombudsman Program (wi.gov)](https://longtermcare.wi.gov/Pages/Ombudsman.aspx) |  |  |
| ***County**** ***Services offered***
 |  | *Worksite application**Website:* |  |  |
| ***Front desk****Meet with secretary,*  |  | *Front desk manual* |  |  |
| ***SHADOWING\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\**** | *\*\*\*\*\*\*\*\*\*\*\** | *\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\** | *\*\*\*\*\*\*\*\*\*\*\*\*\** | *\*\*\*\*\*\*\*\** |
| ***Shadow self-neglect follow up visit with or without dementia***  |  |  | 1 |  |
|  |  |  | 2 |  |
|  |  |  | 3 |  |
|  |  |  | 4 |  |
|  |  |  | 5 |  |
| ***Lead visit with APS*** |  |  | 1 |  |
|  |  |  | 2 |  |
|  |  |  | 3 |  |
|  |  |  | 4 |  |
|  |  |  | 5 |  |
| ***Shadow initial visit***  |  |  | 1 |  |
|  |  |  | 2 |  |
|  |  |  | 3 |  |
|  |  |  | 4 |  |
|  |  |  | 5 |  |
| ***Lead initial visit with APS*** |  |  | 1 |  |
|  |  |  | 2 |  |
|  |  |  | 3 |  |
|  |  |  | 4 |  |
| ***Shadow family meeting*** |  |  |  |  |
| ***Lead family meeting*** |  |  |  |  |
| ***Shadow domestic abuse case*** |  |  | 1 |  |
|  |  |  | 2 |  |
|  |  |  | 3 |  |
| ***Lead domestic abuse case*** |  |  | 1 |  |
|  |  |  | 2 |  |
| ***Shadow initial guardianship meeting***  |  |  |  |  |
| ***Lead initial guardianship meeting*** |  |  |  |  |
| ***Shadow PP Review*** |  |  |  |  |
| ***Lead PP Review*** |  |  |  |  |
| ***Shadow Emergency Prot Plcmt*** |  |  |  |  |
| ***Lead Emergency Prot Plcmt*** |  |  |  |  |
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