

ADRC Reporting Data Requirements

Section 1

Every submission will have a submission data section which will be supplied by the Encounter Reporting team and will be the same on every file submitted.

EX:

```
<?xml version="1.0" encoding="UTF-8" standalone="no" ?> <submission adrc:submission_type="production"
xmlns="http://www.wisconsinedi.org" xmlns:ardc="http://www.wisconsinedi.org"
xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance" xsi:schemaLocation="http://www.wisconsinedi.org
http://www.wisconsinedi.org/schema/adrc_submission.xsd">
```

Every submission must have a header containing all the following information:

- ID of the submitting organization (fixed length of 8)
- Date of submission (ccyy-mm-dd format)
- Posting start date (ccyy-mm-dd format)
- Posting end date (ccyy-mm-dd format)
- Total number of records included (numeric max length of 9)

Detail Data:

Every contact record within each submission must specify the following:

- Contact ID – The sequence of numbers and/or characters that identifies the call or contact.
- Contact Date – The date the contact was made (ccyy-mm-dd format).
- Worker ID – The sequence of numbers and/or characters that identifies the worker.
- Age Group
(Must enter one and only one value within the begin and end tags under_sixty_years_old of the xml. Y for yes, N for no or U for unknown)
 - Under age 60
 - Age 60 and over
 - Unknown
- Disability Type – If one or more disability types are selected then unknown can not be selected. At least one disability type must be selected or unknown must be selected. (Select from one to five, enter a valid value within the begin and end tags of the xml for selected values.)
 - Developmental Disability
 - Elderly
 - Mental Health
 - Physical Disability
 - Substance Use

- OR -

(Select)

Unknown – If unknown is selected then another disability type can not be selected.

- Initiated Contact –

(Must select one and only one by entering a valid value within the begin and end tags of the xml.)

Self

Caregiver

Relative, Guardian, Friend, Neighbor, Community Member (not Caregiver)

Agency, Service Provider

ADRC contacting Consumer (not PAC-related)

ADRC responding to PAC-Nursing Home

ADRC responding to PAC-CBRF

ADRC responding to PAC-RCAC

Other

- ADRC Activity – At least one activity must be selected.

(Must select at least one by entering Y within the begin and end tags of the xml. N can be entered for the non selected values but is not mandatory)

(Enter Y for one or more)

Provided Information & Assistance

Provided options counseling

Provided follow-up

Administered long-term care functional screen

Referred to economic support

Provided assistance with Medicaid application process

Referred for financial-related needs other than economic support

Provided assistance/referral for private pay service options

Provided brief or short-term services or service coordination

Provided youth transition support

Provided enrollment consultation

Provided disenrollment consultation

Provided assistance/referral for health promotion or information

Referred for mental health services

Referred for substance use services

Consumer refused – PAC-related

Section 2

Current Encounter header and submission edits will apply.

Content edits will be developed to reflect the ADRC business rules outlined in section 1.

Required detail fields:

1) Contact ID

2) Contact Date

- 3) Worker ID
- 4) Age group
- 5) Disability type
- 6) Initiated contact
- 7) ADRC activity

ADRC organizations must be identified by the ADRCs or the ADRC business area.

Eligible submitters must be identified by the ADRCs or the ADRC business area.

It is encouraged that empty tags not be submitted. Nulls or spaces between the begin and end tags will be treated as an invalid value and cause an edit to trigger resulting in a rejected file.

Acceptable but not desired: <contact_disability_type_2></contact_disability_type_2>

Unacceptable: <contact_disability_type_2> </contact_disability_type_2>

Definitions/Instructions

Define contact:

Contacts represent individual one-on-one interactions (conversations) that have occurred between ADRC staff and people who contact the ADRC (e.g., individuals with a problem/concern about themselves 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. Individuals may contact the ADRC multiple times; each interaction is counted as a contact. A contact is one instance of at least Information & Assistance. Administrative calls or inquiries are not considered contacts. Routine calls to the ADRC (e.g., what is the meal today at the meal site?) are not considered I&A.

Age Group

Identify 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

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)

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 maybe selected for a contact. Choices are:

- Self (individual contacting 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 contacting the ADRC on behalf of some one who is not the caregiver);

- Agency, Service Provider (individual contacting the ADRC on behalf of some one else);
- ADRC Contacted Consumer (staff from the ADRC initiating 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 contacts consumer as a result of a referral from a CBRF);
- ADRC responded to Pre-Admission Consultation – Residential Care Apartment Complex (ADRC contacts consumer as a result of a referral from an RCAC);
- Other is selected when none of the previous options apply.

ADRC Activity

ADRC activity indicates specific key areas of ADRC service provision. Based on the individual contact, please indicate all activities that apply.

Provided Information & Assistance

Providing 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 is referred to Economic Support 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 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 Brief or Short-Term Services or Service Coordination

ADRC coordinated service needs (e.g., individual may need support to arrange or coordinate services and is lacking a social/family support system to assist them or the individual may have multiple needs and requires assistance until publicly funded service coordination is available).

Provided Youth Transition Support

ADRC assisted young adults 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 managed care organization, including determining their date of enrollment.

Provided Disenrollment Consultation

ADRC assisted an individual by providing information and counseling to assist person in the process of voluntarily or involuntarily disenrolling from a care management organization.

Provided Assistance/Referral for Health Promotion or Information

ADRC provided health related information and/or guidance to individuals. 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.).

Referral 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.

Referral for Substance Use Services

Individual was referred to a provider(s) of substance use 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.

Valid Values:

submitter_organization_id

Any valid 4 digit number combined from the 3 digit county code list and the single digit RCA list and left padded with 6100 to make an 8 digit fixed length.

RCA: The agency associated with the resource center.

one digit agency identifier:

1 = Aging

2 = Aging and Disability

3 = Developmental Disability

4 = None

under_sixty_years_old

valid values are Y=Yes, N=No, U=Unknown

contact_disability_type submit up to 5

Valid values are DD=Developmental Disability, E=Elderly, MH=Mental Health, PD=Physical Disability, SU=Substance Use or AODA, U=Unknown

initiated_contact

Valid values are S=Self, CG=Caregiver, KPNC=Knowledgeable Person Non-Caregiver, SP=Service Provider or Agency, A=ARDC, NH=PAC-Nursing Home, CBRF=PAC-CBRF, RCAC=PAC-RCAC, O=Other