

## AGENDA

Eau Claire County

Aging & Disability Resource Center Board

Monday, June 17, 2024, Eau Claire County Government Center Room 1301/1302

4 P.M.

Those wishing to make public comments must submit their name and address no later than 30 minutes prior to the meeting to [karen.hauck@eauclairecounty.gov](mailto:karen.hauck@eauclairecounty.gov). Comments are limited to 3 minutes; you will be called on during the public section of the meeting. Written comments will also be accepted and should be submitted to [karen.hauck@eauclairecounty.gov](mailto:karen.hauck@eauclairecounty.gov)

Join from meeting link:

<https://eauclairecounty.webex.com/eauclairecounty/j.php?MTID=m1f9bdd24d6b272ac4b7a9f1bb9b0b423>

Join from meeting number:

Access Code: 2594 179 0097 Meeting Password: hP8rb5drYr4

Join from phone: 1-415-655-0001 US Toll, Access Code: 25941790097##

*A majority of the county board may be in attendance at this meeting, however, only members of the committee may take action on an agenda item.*

1. Welcome & Call to Order
2. Confirmation of Meeting Notice
3. Roll Call
4. Public Comment
5. Review of March May 20, 2024, ADRC Board Minutes / Discussion – Action, Handout #1
6. ADRC Board Citizen Member Vacancy / Discussion – Action, Handout #2
7. Transportation Updates
8. General ADRC Informational Training / Discussion, Handout #3
9. Confidentiality – Handout #4
10. Nutrition Updates
11. Resource Center Updates – Advocacy Day
12. Joint Committee Meeting with Finance and Budget Committee, August 5, 2024, 3:30 P.M.
13. Advocacy/Unmet Needs
14. Future Agenda Items – Nutrition Funding Resolution, Revisit ADRC By-Laws, ADA Resources
15. Adjourn

Prepared by Karen Hauck

PLEASE NOTE: Upon reasonable notice, efforts will be made to accommodate the needs of individuals with disabilities through sign language, interpreters, remote access, or other auxiliary aids. Contact the clerk of the committee or Administration for assistance (715-839-5106). For additional information on ADA requests, contact the County ADA Coordinator at 839-7335, (FAX) 839-1669 or 839-4735, TTY: use Relay (711) or by writing to the ADA Coordinator, Human Resources, Eau Claire County Courthouse, 721 Oxford Avenue, Eau Claire, WI 54703.



Discussion on a future review of the ADRC By-Laws and checking with the Eau Claire County Administration to find out if letters were also submitted with the applications.

#### Nutrition Updates:

Betsy Henck reported that a part-time Cook is retiring in July of 2024. The ADRC is currently recruiting to fill that position.

Linda attended the May 14<sup>th</sup>, Aging Advocacy Day held in Madison. Many boards across the state are submitting resolutions for Meals on Wheels (MOW) and Congregate Dining to receive additional funds from the state. MOW and Congregate Dining currently is funded through the federal government Older American Act. Discussion was held. Tami and Linda will work on developing a resolution for the June Board Meeting.

#### Resource Center Updates -

Aging Advocacy Day, May 14<sup>th</sup>, ADRC staff members represented Eau Claire County at this event. Advocacy towards MOW, Para-Transportation, Caregiver Support and ADRC funding. Linda reported that it was a successful day and there will be an in-district event on June 24, in conjunction with Dunn and Chippewa counties, for residents to meet with local and state representatives.

Administration has requested that county boards set their dates for budget hearings to be held after July 16<sup>th</sup>. Discussion was held and a decision was made to move the August ADRC Board Meeting from August 19<sup>th</sup> to August 5<sup>th</sup> to meet with the Finance Committee, this is to be confirmed in June.

Advocacy/Unmet Needs - Discussion was held on unmet needs in the disabled community, such as building access, sidewalk pitch, curb access and how to file a formal complaint.

Future Agenda Items - Nutrition funding resolution, general ADRC informational training, ADRC Citizen Board Member selection, revisit ADRC By-Laws, ADA enforcement, transportation, ADRC Resource Center and confidentiality training.

Next meeting, Monday, June 17<sup>th</sup>, 4 p.m. at the Eau Claire County Government Center Room 1301/1302.

Sue Adjourned the meeting at 5:11 p.m.

Respectfully submitted,

Karen Hauck, Clerk  
Aging & Disability Resource Center Board

**From:** [Samantha Kraegenbrink](#)  
**To:** [Karen Hauck](#); [Linda Struck](#); [Stella Pagonis](#)  
**Subject:** FW: \*NEW SUBMISSION\* Application for Appointment to County Boards and Commissions  
**Date:** Friday, May 10, 2024 2:57:04 PM

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See below.

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**From:** Eau Claire County <donotreply@eauclairecounty.gov>  
**Sent:** Friday, May 10, 2024 12:19 PM  
**To:** Samantha Kraegenbrink <Samantha.Kraegenbrink@eauclairecounty.gov>  
**Subject:** \*NEW SUBMISSION\* Application for Appointment to County Boards and Commissions

**WARNING!! This email originated outside Eau Claire County. Do not click any links or attachments unless you know the sender.**

### **Application for Appointment to County Boards and Commissions**

**Submission #:** 3195603  
**IP Address:** 131.93.99.251  
**Submission Date:** 05/10/2024 12:19  
**Survey Time:** 11 minutes, 16 seconds

You have a new online form submission.

Note: all answers displaying "\*\*\*\*\*" are marked as sensitive and must be viewed after your login.

### **Read-Only Content**

#### **Today's Date**

05/10/2024 12:00 AM

#### **Name of Board or Commission You are Applying For (applications are retained for 2 years)**

**Please select one from the list below.**

ADRC Board

**Are you a current employee of Eau Claire County or employed at a firm that is a vendor or has an affiliation with Eau Claire County?**

No

**The majority of Boards/Commissions/Councils and Committees meet on a monthly basis (date and time is determined by the committee.) Can you commit to attending meetings in**

**accordance with the schedule of the Boards/Commissions/Councils and Committees you are applying for?**

Yes, remotely if necessary

**Section Break**

**Full Name**

Mr. Mike OBrien

**Age 18 or Older**

Yes

**Residence Address**

2975 West Princeton Ave  
EauClaire, WI 54703

**Home Phone Number**

(715) 864-6555

**Business/Cell Phone Number**

(715) 864-6555

**Email**

mfobrien@charter.net

**Do you currently reside/live within Eau Claire County limits?**

Yes

**Number of Years:**

44

**Education**

J.D.

**Do you have relatives employed or appointed to serve in Eau Claire County?**

No

**If yes, please list name, department, and relationship.**

**Please describe any potential conflicts of interest (or list n/a)**

n/a

**List County Boards, Commissions, or Committees on which you have served**

None

**Please describe how you are qualified for the position of interest**

I am a 70 year old stroke survivor and was on the school board for nine years

**If selected, how would you work to better our community?**

I can bring the perspective of a visually and physically disabled person to the board

**Attachment**

Thank you,

**Eau Claire County**

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**This is an automated message generated by Granicus. Please do not reply directly to this email.**

Submission # 3044447  
IP Address 24.50.158.79  
Submission Recorded On 03/04/2024 12:57 PM  
Time to Take Survey 3 minutes, 33 seconds

Page 1

Incomplete applications will not be processed.

Please note, not all board/commission/councils have openings and applications submitted outside of a vacancy will be placed on file.

**\* Today's Date**

03/04/2024 12:00 AM

**Name of Board or Commission You are Applying For (applications are retained for 2 years)**

**\* Please select one from the list below. ?**

ADRC Board

**\* Are you a current employee of Eau Claire County or employed at a firm that is a vendor or has an affiliation with Eau Claire County?**

No

\*

**The majority of Boards/Commissions/Councils and Committees meet on a monthly basis (date and time is determined by the committee.) Can you commit to attending meetings in accordance with the schedule of the Boards/Commissions/Councils and Committees you are applying for?**

?

Yes

**\* Full Name**

Rev. Jonathan Wessel

**\* Age 18 or Older**

Yes

**\* Residence Address**

707 W BROWN ST  
PO BOX 408  
Augusta WI 54722

**\* Home Phone Number**

(715) 286-2665

**\* Business/Cell Phone Number**

(715) 533-9662

**\* Email**

splsaints76@gmail.com

**\* Do you currently reside/live within Eau Claire County limits?**

Yes

**Number of Years:**

15

**\* Education**

Master of Divinity

**\* Do you have relatives employed or appointed to serve in Eau Claire County?**

Yes

**If yes, please list name, department, and relationship.**

Patricia Wessel, Augusta City Council, wife

**\* Please describe any potential conflicts of interest (or list n/a)**

none

**\* List County Boards, Commissions, or Committees on which you have served**

none

**\* Please describe how you are qualified for the position of interest**

I serve an elderly congregation in a elderly community. What is good for them is good also for our congregation.

**\* If selected, how would you work to better our community?**

Making sure that their voices are heard aneed are met.

**Attachment**

\*\*SKIPPED\*\*



# The Impact of ADRC and Tribal Programs in Wisconsin

## Status Report, 2023

Aging and disability resource centers (ADRCs) and Tribal aging and disability resource specialists (ADRSs) provide objective, reliable information about various programs and services available to older adults and people with disabilities. They are at the forefront of efforts to adapt to the emerging needs of our communities, and the staff have a robust knowledge of local agencies and resources that are available for their customers.

ADRCs and Tribal ADRSs make a significant impact on our communities, especially in the lives of those who are aging or living with a disability. This report summarizes ADRC and Tribal program services and uses a variety of data and customer stories to outline the impact that ADRCs and Tribal ADRSs made in Wisconsin in 2023.



# The Impact of ADRC and Tribal Programs in Wisconsin

Status Report, 2023

*“The ADRC Specialist was great! Even came to my house twice with papers I needed to sign. Would not have known what to do or where to go without her help.”*

*—ADRC customer from Calumet County*

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## Our mission

The mission of ADRCs and Tribal ADRSs is to provide older adults and people with physical and intellectual disabilities the resources needed to live with dignity and security and achieve maximum independence and quality of life.

## Our goal

ADRCs and Tribal ADRSs strive to empower individuals to make informed choices and to streamline access to the right and appropriate services and supports.

## Who we are

ADRCs in Wisconsin are integral components under the Division of Public Health in the Wisconsin Department of Health Services (DHS). ADRCs and Tribal ADRSs are one-stop sources for objective, reliable information about programs and services available to older adults and people with disabilities. They connect people with services and supports that allow them to maintain self-sufficiency and conserve personal resources.

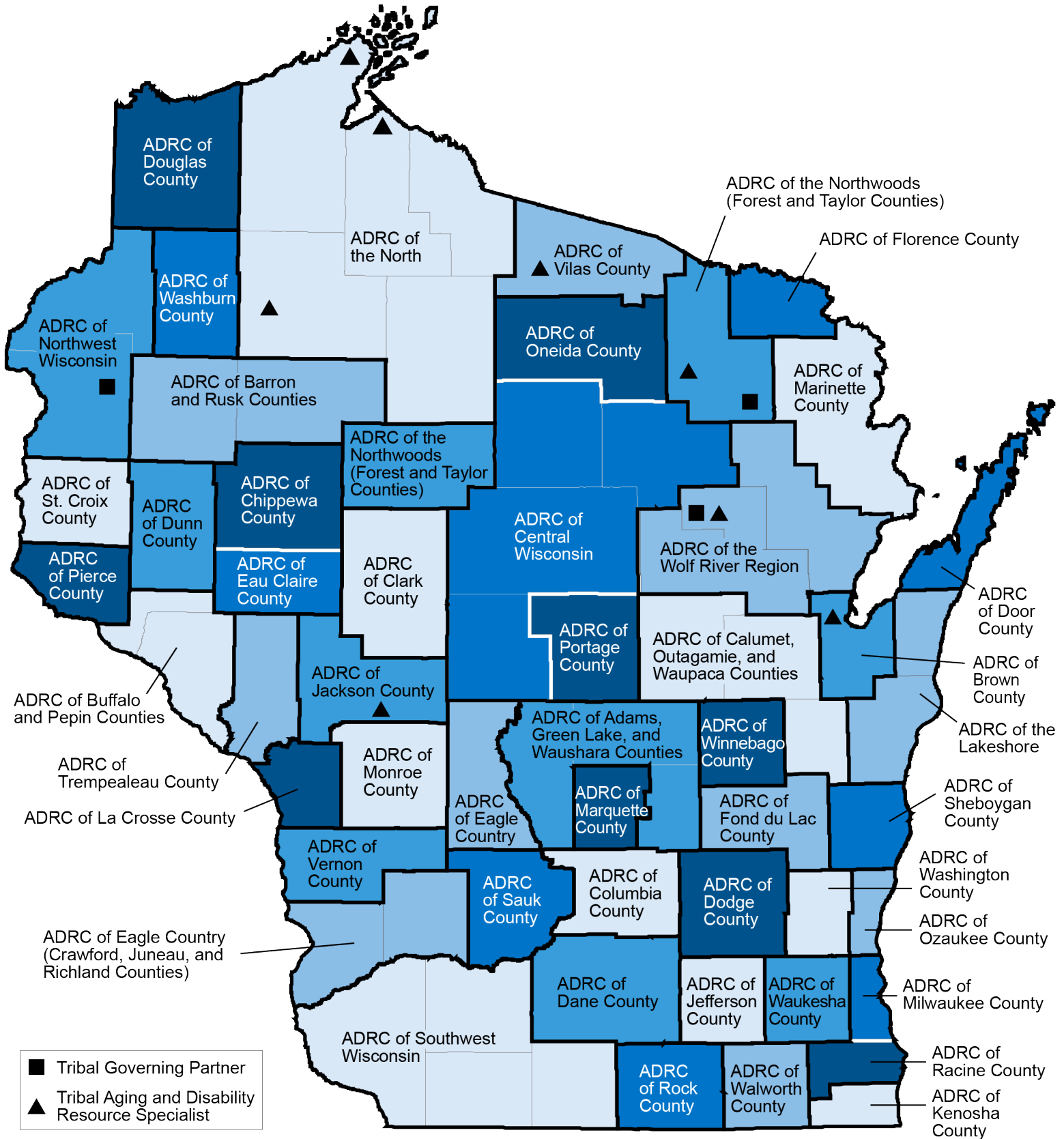
### ADRC and Tribal ADRS services are:

- Free for everyone.
- Available statewide.
- Unbiased.
- Locally based.
- Trusted as community resources.

### ADRC and Tribal staff are available to meet:

- At a local ADRC or Tribal office.
- Over the telephone.
- In the customer’s home.

ADRCs and Tribal ADRSs stand ready to provide information and assistance. They are at the forefront of efforts to adapt to the emerging needs of our communities, and their staff have a robust knowledge of local agencies and resources that are available for their customers.



# An impactful investment for Wisconsin

ADRCs and Tribal ADRSs have served an average of 135,400 customers annually since 2016. In 2023, ADRCs and Tribal ADRSs in Wisconsin experienced remarkable success in meeting the needs of their communities, marking the most significant year since 2016. This milestone emphasizes their dedication to providing essential support and services in the community.



ADRCs and Tribal ADRSs have played a vital role in the lives of the people in their communities since the first ADRCs opened in Wisconsin in 1998—25 years ago! This impact emphasizes the ongoing need for their services.

## Return on Investment

ADRCs in Wisconsin offer a strong return on investment while significantly enhancing the well-being of individuals across the state.

In 2023, every \$1 invested into ADRCs in Wisconsin led to a savings of \$3.88. This savings is calculated based on hospital readmissions and emergency department visits among Medicare beneficiaries and other individuals within 30 days of their original admission. Those who visited an ADRC showed a significant decrease in 30-day readmissions and emergency department visits compared to those who did not visit an ADRC. These data make clear that the state's investment in ADRCs is paying dividends.

ADRCs are successful in helping individuals address aging and disability-related challenges and preventing the escalation of issues that could lead to costly interventions down the road.

The positive impact of ADRCs extends beyond fiscal savings. ADRCs also play a pivotal role in health care outcomes.

ADRCs reduce the burden on the health care system and enhance quality of life for those receiving assistance. These impressive cost savings directly contribute to the state's fiscal well-being, helping to allocate resources more efficiently and effectively. Resources devoted to ADRCs have value and efficiency, making continued support and investment essential.

**147,319**  
customers served in 2023



A person interacts with an ADRC in Wisconsin every **60** seconds.

### The role of ADRCs in health care outcomes

According to 2023 statistics, ADRCs prevented:

- 61 hospital readmissions per 1,000 people served.
- 101 emergency department visits per 1,000 people served.

# Populations served by ADRCs and Tribal ADRSs

ADRCs and Tribal ADRSs are crucial in providing comprehensive support and assistance to community members. Specialists serve as invaluable resources for:



**1,403,494** people aged 60+ live in Wisconsin (about 24% of the total population).

- Adults aged 60 and older.<sup>1</sup>
- Adults with intellectual or developmental disabilities.<sup>2</sup>
- Adults with physical disabilities.<sup>2</sup>
- Non-professional caregivers.
- Anyone seeking information or aid on behalf of someone in these groups.

ADRC and Tribal ADRS services are available to people regardless of their income, race, ethnicity, or other demographic factors.<sup>3</sup>



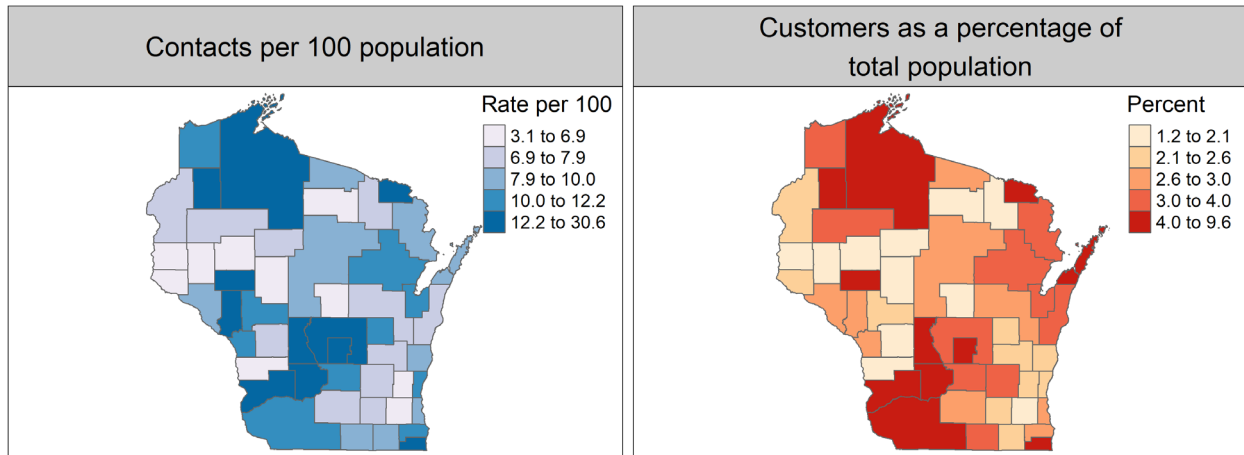
**9.7%** of 18 to 64-year-olds identify as having a disability.



**30%** of people aged 65+ identify as having a disability.

The following maps illustrate ADRC contacts and customers relative to the population in their service areas.

## Customers and contacts compared to total population by Wisconsin ADRCs, 2023



Population data from ACS 5-year estimates 2017-2022.

<sup>1</sup> Tribal nations recognize older adults as aged 55 and older.

<sup>2</sup> Disability status is determined from the answers in the U.S. Census' American Community Survey (ACS). Respondents are considered to have a disability if they report any one of the six following difficulty types: hearing, vision, cognitive, ambulatory, self-care, and independent living difficulty.

<sup>3</sup> Tribal ADRS services are limited to members of the Tribal nations they serve.

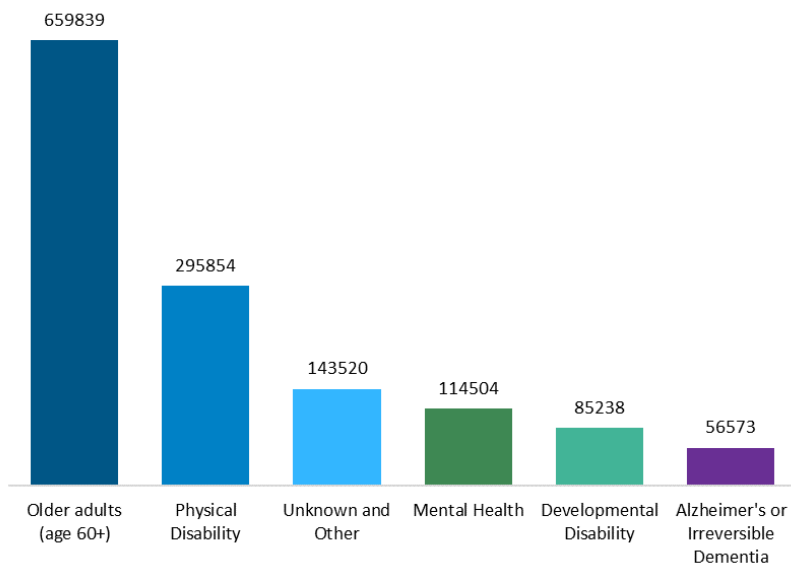
The first map illustrates the number of ADRC customer contacts per 100 eligible individuals in each agency's service area. It provides insight into how well ADRC services reach the population across different geographic areas. This map focuses on the intensity or frequency of contacts relative to the population.

The second map highlights the proportion of the total population that are customers of the ADRCs, providing insight into the broader impact and reach of ADRC services within the community.

### Core demographics of customers

ADRCs and Tribal ADRSs are crucial in supporting adults with diverse characteristics and disabilities. Between 2016 and 2023, nearly three-fourths of all customers were older adults or individuals with physical disabilities. It is worth noting that it is rare for a customer to fit neatly into just one category. Many customers fit into multiple categories, so there is overlap.

**Target Group Categories of ADRC Customers (2016-2023)**



*This data describes the populations ADRCs are contact about and does not represent who contacted the ADRC on someone else's behalf.*

## Ensuring services are accessible to all

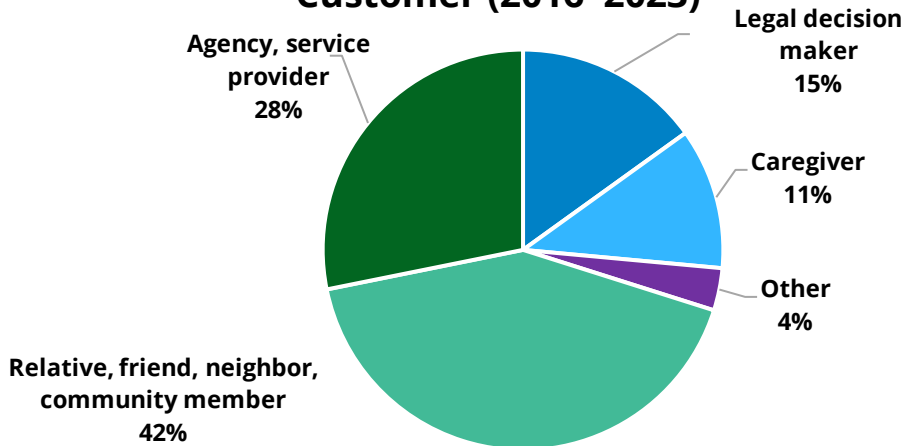
The **ADRC of Dane County** reaches out to communities of color and socioeconomic disadvantaged groups. They advertise in neighborhood newspapers, partner with churches to host community events, and build trust within the community.

The **ADRC of Columbia County** works to develop relationships with businesses and agencies that serve the aging and disability populations. They use social media to share information that appeals to people with diverse backgrounds. Their staff also participate in various educational events to further their knowledge in working with diverse groups.

The **ADRC of the Lakeshore** offers classes virtually and participates in outreach days at community centers in rural areas that do not have an ADRC office.

The **ADRC of Brown County** collaborates with diverse community centers, which include Hmong, Hispanic, refugee, and more.

## Contact's Relationship to Customer (2016–2023)



ADRCs and Tribal ADRS consistently engage with individuals seeking assistance on behalf of someone else. In fact, more than half (63%) of the individuals that contacted ADRCs between 2016 and 2023 did so on behalf of someone else. Only 37% contacted the ADRC to seek assistance for themselves.

Those who contact the ADRC on behalf of others may include family members, caregivers, and friends who are advocating for the needs and well-being of their loved ones.

*“Not an easy process moving from one state to another. The ADRC staff was excellent helping us with our adult son with disabilities. We are very thankful for her and the ADRC team.”*

*—ADRC customer from Jefferson County*

## Services

The dedicated staff at ADRCs offer assistance in various forms, ensuring that their customers receive the support they require to navigate challenges associated with aging and disabilities.

### Information and assistance

Many people contact ADRCs and Tribal ADRSs for general help and guidance. ADRC and Tribal ADRS staff can help people locate and connect with a broad range of community resources. **Approximately half of all ADRC interactions each year involve general information or assistance.**

ADRC staff track the topics discussed during customer interactions. Public benefits were discussed in almost half of all information and assistance interactions recorded in 2023 (47.2%). Other popular topics included housing, food, and transportation (18.6%); medical and health concerns (10.5%); and financial and legal assistance (8.5%).

### Most popular topics discussed during ADRC interactions in 2023

1. Public benefits
2. Housing, food, and transportation
3. Medical and health concerns
4. Financial and legal assistance
5. Nursing homes and assisted living
6. Community resources and education
7. Caregiving
8. Abuse, neglect, and loneliness
9. Unmet needs



## Delivering services and hope to customers

An ADRC customer from Ozaukee County shared the following story about her experience working with the ADRC to get services for her son.

“Our son is 21, and we'd been at a loss as to how to help him get going into adulthood with his disabilities.

“There is something of a stigma to getting help, and my son was really conscious of that. The staff's sensitivity to his desire to do life on his own absolutely saved the day. She treated my son with respect and just the right level of compassion, and she helped him understand that it's okay to get help. She had great insights as to what kind of services he would appreciate and would help him take charge of his life better, while being sensitive and knowledgeable about the needs of our family as a whole.

“The staff was able to engage my son, draw him into conversation, and help him take ownership of decision-making. She recalled things that were important to him and brought those into the conversation, really showing him a personal level of interest that greatly helped his self-esteem. She praised him for the work accomplishments he had made and helped him feel that he had a lot to offer in the right job situation.

“We are really excited as we get going with employment for my son. My son told me he felt hopeful, something he hasn't expressed in a long while.”

### Long-Term Care Options Counseling

ADRCs and Tribal ADRSs are vital in counseling individuals seeking guidance on addressing their long-term care needs. ADRC staff engage with clients in a person-centered decision-support process known as options counseling. ADRC staff will help clients explore and understand the various alternatives available for long-term care. This collaborative approach empowers individuals to make informed decisions tailored to their circumstances. Regardless of whether someone requires financial assistance, options counselors are dedicated to helping customers navigate the complex landscape of long-term care options.

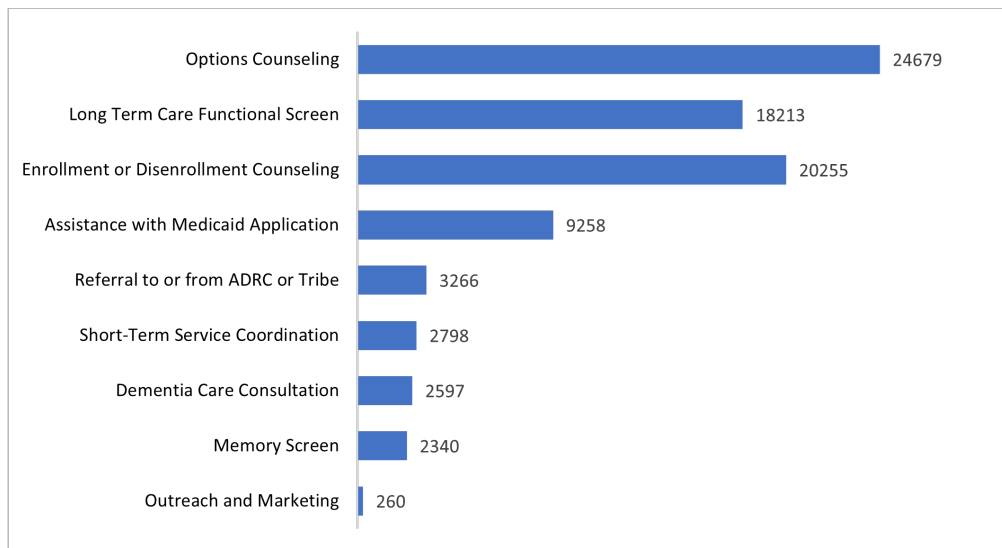
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*“I appreciate the ADRC for reaching out to me to discuss and help me with the complex situation of my wife's care. I thank the options counselor for taking the time to discuss the different facets involved with the Medicaid process and the available services for my wife. Her patience and professionalism eliminated my stress, which made the process a wonderful experience for me.”*

*—ADRC customer from Milwaukee County*

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Next to general information and assistance, the most common outcome for an interaction in 2023 was an ADRC staff providing options counseling to the client.



*“My parents are aging and enduring severe health issues. This is an extremely difficult time for us. My family and I have no desire to place my parents in a nursing home and have been seeking assistance. The entire process was a nightmare, until I contacted the ADRC. I am so grateful for the ADRC staff. She restored my faith in the system. ... she cut through all the red tape and was extremely knowledgeable. She was patient, listened to our concerns, and made me feel heard. At no point did we ever feel rushed or ignored.*

*—ADRC customer from Fond du Lac County*

## Benefits specialist services

Disability benefit specialist (DBS) and elder benefit specialist (EBS) programs support older adults and adults with disabilities who encounter challenges to their independence and financial security. Benefit specialists provide free and confidential benefits counseling services. They help customers access Social Security, Medicaid, Medicare, health insurance, and other public and private benefits.

The chart below shows the top five topics that benefit specialists discussed with customers in 2022 (blue bars) compared to the total number of interactions (gray bar).

### The impact of benefit specialist services

In 2022, benefit specialists had  
**120,069**  
interactions with customers.

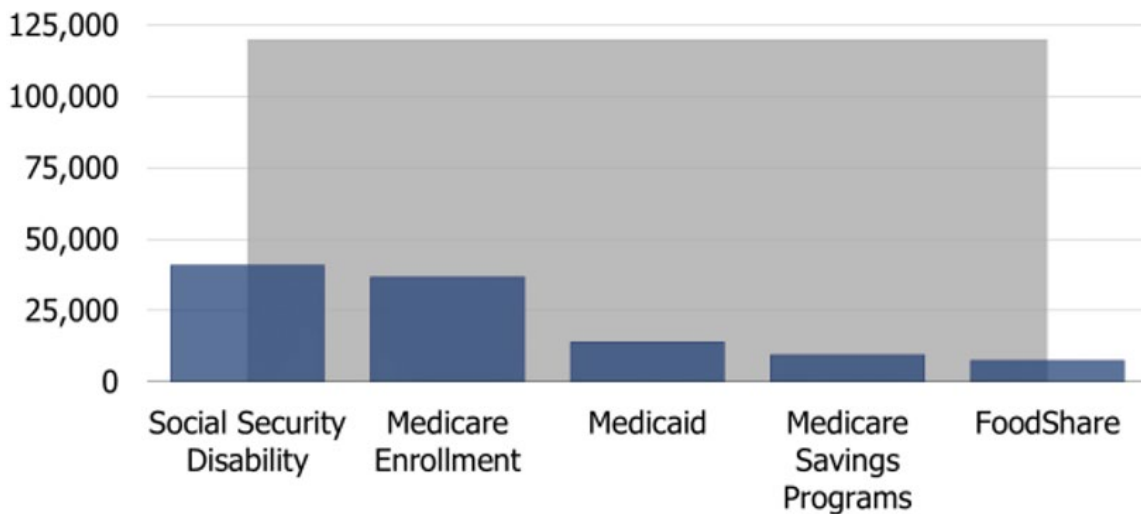
They helped **45,000** customers  
and resolved **92,000** of those  
customers' needs.

The estimated monetary impact totaled  
**\$224,746,524.**



## Interaction Topics

### Total Interactions



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*“The staff went above and beyond to help me try to resolve issues. They made me feel understood and validated and I will be forever grateful for that. The staff actually care about the individuals who come to them for assistance.”*

*—ADRC customer from Vernon County*

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### **Benefit specialist success story: reversing the harm of aggressive marketing**

A dialysis patient had various Medicare and Medicaid plans. She spotted a TV advertisement promising valuable information about her Medicare options. She called the number on the screen, seeking clarity on her coverage. Little did she know this inquiry would set off a series of events affecting her health and well-being.

During her conversation with the phone agent, they enrolled her in a Medicare Advantage plan without her knowledge or consent. It wasn't until she faced a pressing medical need, requiring surgery, that the consequences of this unexpected enrollment became apparent.

As she prepared for her much-needed surgery, she learned that the medical facility did not accept Medicare Advantage plans. This revelation left her anxious and confused as she wondered how she would proceed with her operation.

She contacted an EBS who recognized the situation's urgency and swiftly submitted a formal complaint on the patient's behalf. Thankfully, the advocacy and diligence of the EBS paid off. The client was successfully disenrolled from the Medicare Advantage plan. She was then reinstated into her original Medicare coverage, bringing her peace of mind and ensuring she could proceed with her surgery.

## Dementia care specialist program

The dementia care specialist (DCS) program, within the ADRCs, has recently undergone a substantial expansion, almost tripling in size, and is available in every county and nearly every Tribal Nation. This program plays a vital role in the community by offering services around three pillars.

### Dementia-friendly work environments

DCSs contribute to creating dementia-friendly work environments by offering education and training to colleagues. This understanding is essential for fostering a supportive atmosphere within ADRCs for individuals with dementia.

### Dementia-friendly communities

DCSs actively collaborate with various agencies to create a welcoming and accommodating community for individuals living with dementia. They engage in outreach initiatives to establish safe spaces where people with dementia can thrive. They also provide education to increase awareness and understanding of dementia, helping community members recognize the signs and provide support.

### Work closely with families

Often, individuals with dementia may not have insight into their condition or may resist help, making family caregivers essential. DCSs engage with caregivers, providing them with the knowledge and resources to provide the best care for their loved ones.

The DCS program is a valuable asset to the community, promoting awareness, education, and support for dementia-related issues.



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*"I was in tears worrying about getting things together for my husband who has dementia, and the ADRC staff said, 'Don't worry about it. I can help you. Let's take it one step at a time.' I feel like someone actually cares and is helping me, and I have a direction to go now. I cannot believe the service I got from them."*

—ADRC customer from Milwaukee County

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*"Your DCS has been a wonderful resource. She is friendly, experienced, caring, and resourceful. It's very clear that she cares about the people she works with and is always willing to answer questions, find resources, and support those of us caring for people with dementia. I'm very glad she is part of my support team."*

—ADRC customer from Milwaukee County

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# The Remember Project at the ADRC of Columbia County

The ADRC of Columbia County brought [The Remember Project](#) to their community in 2022 and 2023. The Remember Project uses art to end dementia stigma. The ADRC of Columbia County director, Sue Lynch, explains that “[the Remember Project] has been such a wonderful opportunity to help build dementia-informed communities and reduce stigma of a memory loss diagnosis.”

## Community engagement

ADRCs and Tribal ADRCs actively engage with their communities to provide their services, offer community support, and ensure they are a trusted resource. They participate in numerous committees and workgroups. They also collaborate with various stakeholders to develop and implement solutions to address critical issues such as housing affordability, hospital discharge procedures, suicide prevention, and the transition of high school students with disabilities into the community.

ADRCs also participate in and sponsor local events and projects. For example, the ADRC of the Lakeshore works with their local YMCA, clinics, and other partner agencies to provide community classes. They also work with local farmers to deliver fresh produce to homebound individuals.

## Bridging trust and building healthy lives: a success story in Richland County

Staff at the ADRC of Eagle Country in Richland County worked with an older woman with mental health issues. As her condition declined, she had issues with hoarding, and became estranged from her family. The one connection she consistently kept was her relationship with the ADRC. Over the years the ADRC helped facilitate the cleaning of her home, home-delivered meals, and enrollment in a Family Care program. The ADRC helped her transition to an assisted living facility, where she receives her meals and medications and lives in a clean and safe environment. Her health condition has been improving, and the hope is that by the time she can leave the assisted living facility, her home will be suitable for her to return to and live in with supports.

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*“When I was referred to the ADRC by my dad’s social worker, I was hesitant, thinking this will be an enormous hassle and a long, painful process, and boy was I wrong. [When I called,] I explained my situation with my dad [and that] I had no clue where to turn. Even though I visited every three days, and he had a caregiver twice a week, it was getting quite scary from a few falls. [The ADRC staff] listened, gave me her number, and said she would follow up.*”

*“The ADRC staff came to assess in less than a week from my call and was always very accessible, responded quickly, and was so kind. She was very thorough with her requests and the process. Within three weeks we were through the process. Dad has been approved to move into our desired assisted living, and we can’t be happier. I will now be five minutes from my dad, and he will be safe, warm, and well fed.”*

*—Email from ADRC customer*

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# Tribal services

The Tribal aging and disability resource specialist (ADRS) is a professional position employed by a Tribal Nation or Tribal organization. Tribal ADRSs ensure that Native American people have access to culturally appropriate information on aging and disability services.

Tribal ADRSs represent a critical component of the aging and disability network's strategy for ensuring that the unique needs of Tribal communities, specifically Tribal Elders,<sup>4</sup> are met. Tribal ADRSs serve Tribal members based on the customers' individual needs and preferences. This person-centered model of services fosters an effective and supportive approach to addressing the needs of Tribal elders and those with disabilities.

## A large Tribal community

"The Lac Courte Oreilles Tribe is fortunate to have two aging and disability resource specialists," says Rosalie Gokee. "The Lac Courte Oreilles Tribe has over 8,194 Tribal members, and 3,060 of those reside within the Tribe's service area."

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*"One elder wanted to make me aware that they are so thankful for the assistance provided by the ADRS. They made them feel comfortable and helped them through a hard time in their life!"*

*—Tribal aging and disability services director of the Lac Courte Oreilles Aging and Disability Services, Rosalie Gokee*

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Ten of the 11 Tribal nations that share geography with Wisconsin employ at least one Tribal ADRS. In coordination with each Tribal Nation's elder services, disabled services, health care services, veteran services, and community services, the Tribal ADRS role enhances service to best meet the needs of the community.

Members of Tribal nations can choose to work with the Tribal ADRS or the local ADRC when seeking services such as information and assistance, options counseling, or access to publicly funded long-term care. The coordination between Tribal ADRSs, ADRCs, and Tribal nations is essential in ensuring Tribal elders receive culturally sensitive and appropriate services.

## Special projects

### Community health workers grant

The Wisconsin Department of Health Services (DHS) Office for Resource Center Development (ORCD) received funds from the Center for Disease Control and Prevention to combat COVID-19 infection, illness, and death. The project aims to reduce health disparities related to COVID-19 by reaching underserved populations in ADRCs that serve rural areas. The funding is available through May 31, 2025.

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*"We had an unexpected, overwhelmingly positive response from the community to hire a CHW. She is teaching customers how to keep themselves healthy, which has been a big trust builder."*

*—ADRC worker*

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<sup>4</sup> Tribal nations recognize older adults as those aged 55 and older, as opposed to local ADRCs, which provide aging services beginning at age 60.

The ADRCs of Barron and Rusk Counties, Dunn County, and Jackson County applied and were awarded funding to implement community health workers (CHW).

- **Barron and Rusk counties** focus on working with the home-delivered meal program to identify participants needing a connection to further community resources. The CHW works with clients for 90 days.
- **Dunn County** focuses on working with Hmong community members. The CHW is Hmong and is integral in building rapport between the ADRC and the Hmong community.
- **Jackson County** focuses on providing short-term service coordination and extra attention for people in complex situations who might otherwise fall through the cracks.

## Vaccine access grant

ORCD received funds from the Administration for Community Living in 2021 to support ADRC and No Wrong Door agencies. These agencies used the funds to provide resources and information to promote receiving COVID-19 and other relevant vaccinations among at-risk older adults and people with disabilities.

Grant activities included:

- Public education and outreach related to the COVID-19 vaccine.
- COVID-19 vaccine appointment registration assistance.
- Sponsorship of or help with COVID-19 vaccination events.
- Transportation to and from COVID-19 vaccination sites.
- Addressing accessibility needs through assistive technology or accommodation.
- Coordination of in-home COVID-19 vaccinations.

The flexibility of the funding allowed ADRCs to develop projects that best fit their community's needs.

## ADRC modernization

The ADRC modernization project comprises five initiatives focused on modernizing and diversifying access to ADRC and Tribal ADRC information and resources. The project is one of many for older adults and people with disabilities to allow them to live as independently as possible. The American Rescue Plan Act (ARPA) supports this work.

## Enhanced public outreach

Both the ADRC of Milwaukee County and the ADRC of Jackson County used funds for unique public outreach and education projects.

- The ADRC of Milwaukee County developed a marketing campaign called "Boosted and Blessed" to reach areas with low vaccination rates.
- The ADRC of Jackson County developed "Healthy Measures" totes. The totes were insulated bags containing a "COVID Kit" and information on community resources like ADRC services, community health worker contacts, a how-to guide for fraud protection, and an emergency preparedness toolkit for people with physical disabilities.

## Marketing and outreach

The marketing and outreach team is implementing a coordinated statewide marketing and outreach campaign to promote:

- A virtual resource platform.
- Local ADRCs and the centralized website.
- Early access to information and resources.

## Reporting system improvements

Efforts are underway to identify a modernized information system that better meets the reporting needs of ADRCs and aging programs. Desirable features of the system include:

- Improved user interface.
- Customizable reports.
- Document storage.
- Interoperability with other systems.
- Additional features based on feedback from state and local partners.

## Long-term care enhancement

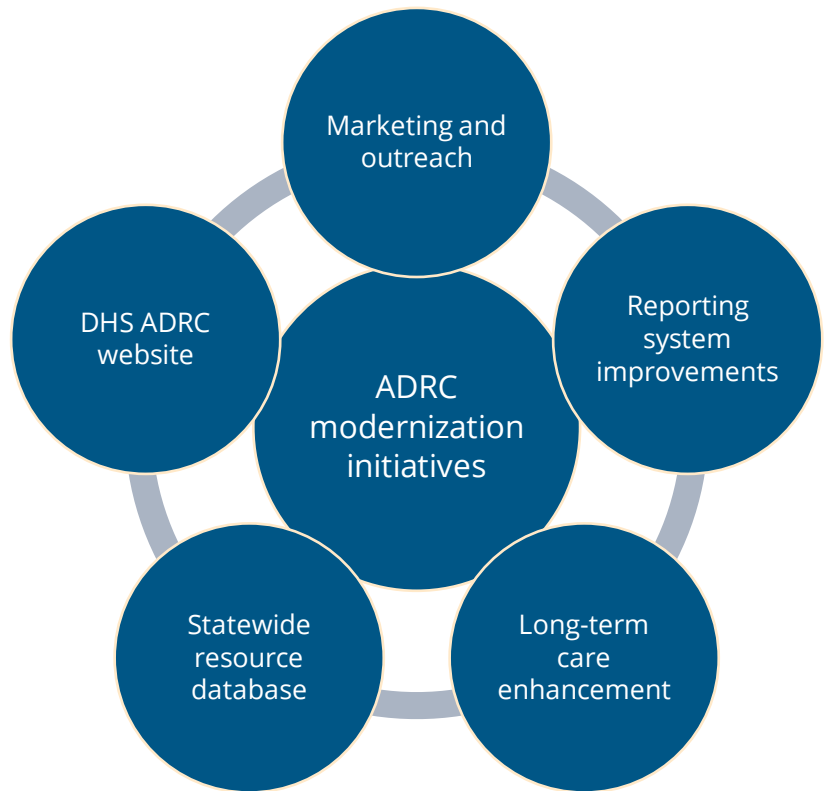
The long-term care enhancement workgroup aims to improve people's access to and understanding of publicly funded long-term care programs. The team is working on the following projects:

- Revising the long-term care enrollment counseling publications.
- Providing online information about the process of youth in transition to adult services for youth and their families.
- Creating a long-term care program decision tree to assist customers in understanding their options during enrollment counseling.

## Statewide resource database and DHS ADRC website

A statewide resource database will meet the needs of local ADRC and Tribal ADRC staff and have a public-facing search capability. Features may include:

- Smart logic for resource searches.
- Login option for local ADRC and Tribal ADRC staff where additional information can be kept.
- Ability to select and seamlessly email resource information to customers.







Learn more about ADRCs and Tribal ADRSs in Wisconsin and find your local ADRC

<http://www.dhs.wisconsin.gov/adrc/index.htm>



Wisconsin Department of Health Services  
Division of Public Health  
P-00251 (06/2024)

**Applies to:  
ADRC  
Tribal ADRS**

**P-02923-06 (12/2022)**

**Confidentiality Policy**  
Last Revised: December 2022

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This policy applies to aging and disability resource centers (ADRCs) and Tribal aging and disability resource specialists (Tribal ADRS), herein referred to as “agency” or “staff.”

**I. Purpose**

The purpose of this policy is to provide guidance on how information should be accessed or shared consistent with the customer’s right to privacy and with the requirements of state and federal law. The policy and procedures in this document are fundamental to any county or Tribal confidentiality policy that applies to the ADRC or Tribal ADRS. Agencies may have one confidentiality policy for their county or Tribe as long as the requirements in this policy are included in the county or Tribal policy.



All ADRC staff, including volunteers, board members, contractors, and Tribal ADRS are expected to be familiar and comply with the requirements of this policy. Benefit specialists are subject to the confidentiality requirements specific to their program and should follow their [program guidelines](#) when different from this policy.

## **II. Principles**

### **A. Respect for the Privacy and Best Interest of the Customer**

Decisions about what customer information is accessed or shared will be based on what is in the best interest of the customer and consistent with the customer's right to privacy. Customers should not be pressured to reveal more than they are willing to share and will be allowed to remain anonymous if they so desire.

### **B. Informed Consent**

Customers should be told that the information they share with the agency is kept in confidence and may be shared, when needed, with the customer's permission. It is best practice to inform customers about how their information will be used and to obtain at least a verbal consent, even when consent is not strictly required.

If staff have reason to believe that the information the customer has shared or is about to share would not be protected, they should inform the customer of the limits to confidentiality. These include reporting abuse or neglect; cooperating with public health, adult protective services, law enforcement, or a court order; and emergency situations.

### **C. "Need to Know" and "Minimum Necessary" Standard**

Staff shall obtain only that information which they need to know to assist the customer and will use customer information only for purposes directly related to the provision of services to the customer.

### **D. Compliance With Confidentiality Laws and Policies**

Customer confidentiality is protected by federal and state statutes and regulations and by county or Tribal government policies and procedures. The agency and its staff will abide by all legal requirements relating to confidentiality.

### **III. Policy**

#### **A. Staff Training and Assurances**

All newly hired staff will be trained on the confidentiality policy as part of their orientation. Refresher training will be provided to all staff annually.

All staff must sign a confidentiality and non-disclosure agreement stating that they have reviewed, understand, and will abide by the confidentiality policy before being given access to confidential customer information. A copy of the policy will be given to each staff member for their records, and a copy of the signed confidentiality agreement will be kept in each staff member's personnel file. This agreement shall be reviewed and signed annually, at a time determined by the agency.

#### **B. Types of Confidential Customer Information**

All personal information about a customer is considered confidential. This includes but is not limited to:

- The person's name, address, birth date, Social Security number, and other information that could be used to identify the customer.
- The person's physical or mental health, functional status, or condition.
- Any care or services that the customer has received, or will receive, from the agency or any other provider.
- Financial information, including income, bank accounts and other assets, receipt of benefits, eligibility for public programs, or method of payment for services provided to the customer.
- Employment status or history.
- Education records.
- Any other information about the customer that is obtained by staff.

#### **C. Access to Confidential Customer Information**

Staff, including directors and supervisors, may access confidential customer information to provide information and assistance, options counseling, benefits counseling, functional

eligibility determination, enrollment counseling, and other ADRC services.

## **D. Disclosure of Customer Information**

Staff may not disclose or acknowledge whether a person has received or is receiving services from the agency, unless it has been established that the information can be legitimately shared. When unsure, staff receiving an inquiry regarding the status of a customer will respond in a non-committal manner. For example, staff may say, “The agency confidentiality policy does not permit the disclosure of that information.”

### **1. Disclosures That Require Prior Written Informed Consent**

The types of disclosures that require prior signed authorization from the customer or the customer’s legal representative include:

- Information with counties outside of the agency’s service area for purposes other than access to publicly funded long-term care programs.
- Medical information with an employer, life insurer, bank, marketing firm, news reporter, or any other external entity for purposes not related to the customer’s care.
- Substance use disorder (SUD) treatment records.
- School records.
- Any disclosure for purposes not relating to the services provided by the agency.

### **2. Process for Obtaining Written Informed Consent**

The agency will obtain a release of information form that describes the information to be shared and who can receive and use the information, and that is signed and dated by the customer whose information is to be shared or by their legal representative. A copy of the signed release form will be given to the customer or their legal representative.

The customer’s records and a copy of the signed release of information form will be kept in the customer’s file.

Any written disclosure of confidential information by staff will be accompanied by a written statement documenting that the information is confidential and that further disclosure without the customer’s consent or statutory authorization is prohibited by

law.

### **3. When Verbal Consent Is Sufficient**

The following situations require only verbal consent to share customer information:

- Sharing information with the customer’s family, friends, caregivers, and providers who are involved with the person’s care, when necessary to coordinate services for the customer.
- Contacting an agency or service provider on the customer’s behalf.
- Referring the customer to services provided by the agency.
- Referring the customer to services provided by other county or Tribal departments or agencies.
- Linking customers to community resources.

Records of verbal consent should be documented and kept in the customer’s file.

### **4. Customer Right to Revoke Consent**

A written release of information or verbal consent may be rescinded by the customer or their legal representative at any time. This should be done in writing, if possible.

Revocation of a prior consent should be documented in the customer’s file.

### **5. Disclosures That May Be Made Without Written or Verbal Informed Consent**

Neither written nor verbal informed consent is required in the following situations; however, it is advisable to let the customer know that these exchanges may take place when:

- Exchanging customer information necessary for the agency to perform its duties or coordinate the delivery of services to the customer.
- Transferring the long-term care functional screen for the purpose of enrollment into a managed care organization (MCO) or IRIS<sup>1</sup> consultant agency (ICA) in the

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<sup>1</sup> IRIS stands for “Include, Respect, I Self-Direct”.

agency's service area.

- Transferring the long-term care functional screen to the ADRC serving the county in which the customer resides.
- Exchanging information necessary to coordinate the delivery of ADRC services, county human services, Tribal services, social services, or community programs to the customer.
- Reporting possible abuse or neglect of an elderly person or vulnerable adult, per [Wis. Stat. §§ 46.90](#) and [55.043](#).
- Cooperating with public health, adult protective services, or elder or adult-at-risk investigations.
- Cooperating with a law enforcement investigation. Check with your legal counsel before providing information in this type of situation, as there are limited situations where you can disclose information to law enforcement.
- Sharing information in the event of an emergency, per established emergency procedures.
- Exchanging information necessary for the Wisconsin Department of Health Services to administer the Family Care, IRIS, or Medicaid programs.
- Exchanging information necessary to comply with statutorily required advocacy services for Family Care and IRIS enrollees and prospective enrollees.
- Required by a signed court order.

## **IV. Procedures**

### **A. Staff Actions to Safeguard the Confidentiality of Customer Information**

Staff are expected to employ the following practices to safeguard customer confidentiality:

- Only access personal and identifiable customer information when you need it to perform your job.
- Disclose confidential information only to those who need it to complete their jobs and are authorized to receive it.
- Obtain informed consent prior to accessing or disclosing information, consistent with

provisions outlined in this policy.

- Do not discuss a customer's information with anyone else unless access to such information is expressly permitted by the customer.
- Do not access information about your family members, neighbors, or friends. Review any requests to serve people you know with your supervisor.
- Refrain from communicating information about a customer in a manner that would allow others to overhear.
- Keep confidential information out of sight.
- Protect access to electronic data.
- Send fax transmissions that contain confidential information with a cover sheet that includes a confidentiality statement.
- Delete or dispose of information that is outdated and no longer needed in accordance with record retention guidelines and state and federal laws.
- Report any violations of confidentiality to your supervisor.
- Check with your supervisor if you are unsure whether information may be disclosed.

## **B. Measures to Safeguard the Privacy of Customer Records and Data**

In addition to the above guidelines for staff, the agency must have the following safeguards in place to protect the privacy of records and data and to prevent inappropriate use or disclosure of customer information:

- Locked file cabinets for confidential information and a secure area for records storage are provided.
- Confidential documents that are no longer needed are shredded.
- Staff computers are equipped with security features to protect customer data from unauthorized interception, modification, or access during electronic transmission and receipt, transfer, and removal of electronic media.
- Computers, laptops, and portable devices have encryption software installed.
- When disposing of printers, copiers, scanners and fax machines, the hard drives are wiped, or otherwise disposed of, in a way that prevents access to captured document images.

- Staff who leave their employment or affiliation with the agency lose their ability to access customer information and data systems, effective immediately upon their departure.

### **C. Accessing Records from Outside of the Agency**

Customers or their legal representatives will be asked to sign a release of information form to permit the agency to access any confidential records needed to complete the long-term care functional screen or provide other services to the customer. The signed form will be kept in the customer's file and a copy of the signed form will be provided to the customer.

### **D. Informing Customers of Their Rights**

#### **1. Informing Customers About the Confidentiality Policy**

As a common practice, staff will ask customers whether they have any objection to sharing information, even if written authorization is not required. Staff will inform customers about the agency's confidentiality policy and the customer's right to see their records, obtain copies, and contest the information contained in those records.

#### **2. Customer Requests to View or Get Copies of Their Records**

Customers have a right to view and receive copies of their records on file at the agency. To do so, the customer or their legal representative will submit a written request, a copy of which will be kept in the customer's file, together with a record of the information that was disclosed. The agency may charge the customer for paper copies of records exceeding 10 pages.

#### **3. Requests to Share Agency Information with a Third Party**

If the customer wants information from their record given to another person or agency, the customer or their legal representative must complete a release of information form indicating which information is to be sent and to whom. The agency may charge the customer for paper copies of records that exceed 10 pages.

### **E. Monitoring and Ensuring Compliance**

Supervisors are responsible for monitoring and ensuring staff compliance with this

confidentiality policy by conducting periodic compliance checks, reviewing the confidentiality policy with annually with staff, and providing training to staff.

### **1. Reporting Security Violations and Breaches of Customer Confidentiality**

Staff will report any breach of customer confidentiality to their supervisor or privacy officer as soon as it is discovered and follow the designated incident reporting process, where applicable. The ADRC director or supervisor should report the breach to their assigned regional quality specialist for awareness.

### **2. Mitigating and Correcting Breaches of Confidentiality**

Violations of the confidentiality policy will be documented and corrected. Where required or appropriate, customers will be notified of the breach and of actions taken to mitigate the situation.

## **V. Additional Information**

If you have questions or would like additional information, contact your assigned [regional quality specialist](#).



**Confidentiality and Non-Disclosure Agreement — ADRC Representative**

As a representative of the Aging and Disability Resource Center of \_\_\_\_\_, I have reviewed and received training on the confidentiality policy. If I do not fully understand this policy or how it is relevant to my employment or association with the ADRC, I will not sign this statement until I have spoken with the ADRC supervisor and I understand this policy.

I acknowledge that I will be required to review the confidentiality policy on an annual basis.

As a representative of the ADRC, I acknowledge, by signature, that I have reviewed the confidentiality policy, received training on the policy, and agree to comply with its provisions. I acknowledge the obligation of ADRC staff to protect the confidentiality of ADRC customers in accordance with this policy.

Printed name and title:

Date of policy review:

\_\_\_\_\_  
Signature:

\_\_\_\_\_  
Date signed:

\_\_\_\_\_  
Supervisor Signature:

\_\_\_\_\_  
Date signed: