



“A community that values, empowers and supports seniors, people with disabilities, and their caregivers”

Aging and Disability Resource Center of Brown County I & A Caller Assessment First Contact

Evaluation of Identity, Intent Needs and Services:

You will need to rearrange the order that you ask questions based on the openness of the caller and the initial information you collect. Be sure to set a welcoming tone and openness to listen. Your main **job** is not to collect data from them but establish rapport and allow the caller to tell their personal story. Follow their flow of conversation and help them problem solve the issues. Early on, establish if a phone conversation is the best approach or if a home visit would assist the caller/customer more.

Assessment and Options Counseling:

The ADRC is charged with assessing the needs of callers, presenting information over the phone, in office or in home. The assessment conducted is the foundation for I & A staff's work. Their job is to support decision making by exploring options, choices, pro's and con's, and costs that delay the need for expensive long term care.

Your documentation should reflect a comprehensive assessment of the consumer/callers situation and should be descriptive enough that team members would be able to read a summary of the issues, needs, options, and actions that are going to be taken. Your notes should reflect why you did not ask all of the questions needed to get a full picture of the individual situation. For example, the consumer expressed they are uncomfortable with questioning, the consumer was unable/unwilling due to cognitive deficits answer all the questions et..

This document intent is not to guide the I & A worker with computer data entry but to be a checklist to guide the worker through a comprehensive conversation related to the contact.

Identity

Identity of Caller

1. Name, Address, Phone Number
2. Relationship to older adult/person with a disability-Family, Friend, Neighbor, Professional
3. Contact by Phone, walk in, letter, office appointment
4. How did they hear about our agency?

Identity of Consumer:

1. Name, Address, Phone Number
2. Date of Birth
3. Physician
4. Contact people
5. Gender

6. Marital Status
7. Ethnic background
8. Current Living Arrangement
9. Age Group
10. Disability Types: Can be more than one

Intent

Intent of Caller:

1. Why are they calling today? What do they see the problem to be? What needs do they identify as primary?
2. What would the caller like to see happen as a result of their contact with the I& A unit today?

Intent of Consumer:

1. Do they know that the call is being made today?
2. Are they calling themselves?
3. Who do they feel comfortable asking for help?
4. Do they feel threatened by other agency involvement?
5. Can the I & A staff call them directly?
6. What are their preferences? What are their goals short term and long term?

Needs/Preferences

Needs of Consumer and Caller

It is often helpful to let the caller, if an older person/person with a disability, tell the I & A Staff about a typical day. Listen for the areas listed below and prompt them to talk about these areas as supportively as possible.

Review Primary Needs (and level of support required) of consumer as appropriate:

- a. Physical problems and strengths
- b. Medications
- c. Activities of daily living(ADL's/IADL'd)-bathing, dressing, toileting, housekeeping, meal prep, lawn care, transportation
- d. Cognitive status
- e. Emotional Status-hx of depression or mental health concerns
- f. Home environment-stairs, home conditions, adaptive aides in place or needs
- g. Support network-family, friends, neighbors, church, existing agencies
- h. Financial Status-on benefit programs? MA, SSI, SSDI, Ability to meet basic needs with financial situation

Services: Options Counseling

Be sure to reassure the caller you will send or deliver written information to support your discussion today-they will be able to see the information again in writing. Be sure to offer to call them back as a follow up to your conversation and they can call the ADRC back at any time

more questions. Try not to overwhelm the caller with too many choices-you can always call them back.

Service Identification

1. Begin with the least costly and most acceptable types of services i.e.. home delivered meals, lifeline, friendly visitor
2. Try to describe services in the form of an action plan-for example, “first, you may want to try this service as its simple to set up and inexpensive, next, you will want to call Human Services for a full assessment et...be sure to explain what they might expect as they contact agencies or apply for benefits.
3. Group services by options along the continuum of care ie...: Services that come into the home, intermediate level of care in assisted living or apartment living, skilled level of care services-nursing homes.
4. Assist with decision support. Help the consumer weigh the pro’s and con’s of choosing certain services, their cost, and how that might affect their short and long term goals. For example, choosing assisted living at a certain cost is much more expensive than bringing in meals and a housekeeper.

Action Plan

1. Describe the plan for the next steps
2. Who is going to do what and by when
3. Communicate this clearly to the consumer and/or their family
4. Document this in the notes clearly identified as the action plan
5. If doing an assessment in the home, leave action plan steps with the consumer in writing if possible.