

Follow-Up Contact Policy		
Policy #: 25	Date of Approval: 2/02/2012	Date Policy is Effective: 7/31/09
Responsible Person: ADRC Office Manager		Author: Regional Office
Reference: Operational Practice Guidelines, 12/08/06 http://dhs.wisconsin.gov/lc/lc/pdfs/IAFollow-up12-08-06.pdf ; Scope of Service 2012, ADRC Sharepoint Policy Chttps://share.health.wisconsin.gov/lc/teams/ADRC/ADRC% 20Document%20Library/IA%20Follow-up%20Policy.pdf		Approved By: Eagle Country Governing Board 7-23-21
Cross Reference:		

Information and Assistance Follow Up Policy

Aging and Disability Resource Centers (ADRC) are expected to follow up with the people who contact them for information and assistance. The purpose of this policy is to ensure that, as appropriate, ADRC Specialists make follow up contacts in order to determine outcomes and to provide additional assistance in locating or using services as appropriate.

Purposes of follow up:

Follow up is an important component of a customer's interaction with ADRC staff. Not only is follow up strongly associated with customer satisfaction, but also follow up allows ADRC staff to ensure a customer is getting the information and assistance they need. Customers often come to the ADRC with complex questions and concerns; follow up is an opportunity for staff to more fully address customers' needs. For example, follow up provides ADRC staff an opportunity to:

- To check on the safety of the customer.
- To find out whether the customer received the information that was sent.
- To determine if more assistance is needed or if the customer has more questions. Often people don't know what to ask for in the initial conversation.
- To provide more help when the person is unable to do it himself.
- To develop rapport with a customer who is likely to develop a need for additional assistance.
- To provide coordination of services and/or referrals.
- To track unmet needs. A follow up will confirm that the customer has not been successful finding the services they need.

"Follow up" is not "follow along". Staff inquire about how the person is doing, what happened, and what did or did not change.

Professional judgment:

When providing information or options counseling, ADRC Specialists will assess whether the customer is capable of understanding and using the information about resources being provided by evaluating potential barriers such as memory problems, cognitive disabilities, health issues, level of family support, willingness to accept needed services, etc. As deemed appropriate by professional judgment, ADRC Specialists will immediately offer assistance, and/or will make follow-up contact(s) to determine if the

customer acted upon the information provided and offer needed assistance in making connections to programs, services and public benefits.

Listed below are aspects of customer interactions for which follow up should be provided and aspects of customer interactions for which follow up should not be provided. The lists below are not exhaustive, and use of professional judgment regarding when to follow up is encouraged. On-going discussions and review of customers' situations by ADRC Specialists, supervisor and/or colleagues can be used to support appropriate follow up. The AIRS *Standards for Professional Information and Referral* can also be used as a resource (these are available at <http://www.airs.org>). Note that follow up is associated with positive customer outcomes. It is better to follow up, than not, when unsure if follow-up is needed.

Aspects of customer interactions for which follow up should be provided:

- Collateral contacts need to be made.
- Situations involve crisis, emergency, or endangerment.
- An application needs to be submitted by or on behalf of the customer.
- Information has been sent to the person.
- The person making the inquiry has multiple concerns.
- The amount of information and assistance provided may be overwhelming to the customer.
- ADRC staff have a concern that the organization to which they have referred a customer may not be able to provide the needed service in a way that is satisfactory to the customer.
- A referral is made to a new or unfamiliar service or provider.
- A home visit has occurred. **(unless customer has enrolled)**
- Basic needs of food, clothing and shelter were identified as primary issues.
- A person appears to be unable to proceed with the information independently.
- The person is unsure, upset or disappointed.
- The ADRC staff are aware that the customer's next steps involve a long and/or complex process.

Aspects of customer interactions for which follow up should not be provided:

- The conversation is brief and specific, as in a request for a phone number or a simple referral.
- When the customer has indicated that he or she does not wish to have a follow up contact.
- Customer has indicated that he/she will call or come back to the ADRC.
- The customer has indicated the desire to remain anonymous.

Additional considerations:

- Ask permission to follow-up.
- Make sure you are talking to the right person during the follow-up call.
- Avoid disclosing sensitive information or violating confidentiality.

- ADRCs may consider blocking the ADRC phone number for Caller ID depending on the circumstances of each particular call.
- Consider using software to prompt staff to follow-up on customer inquiries.
- Keep records of follow-up activity.

Follow-up should be directly with the customer, caller, or with family members, significant others or service providers with the customer's permission. When providing follow up, the caller type "ADRC Contacted Customer" must be selected.

Follow-up must be conducted in a timely manner. While in general this means follow-up activity should be initiated within five business days unless postal mailing is involved, more importantly the timing of the follow-up contact should meet the needs of the situation and the plan agreed to with the customer.

Procedures:

ADRC Specialists shall establish a reminder or tickler system to track follow-up contacts needed on a given day.

ADRC Specialists must document all follow-up ADRC Activities in the Wellsky client tracking database.

Wellsky Procedure:

When entering a call "Provided Follow-up" should be selected as an ADRC Outcome.

History: Reviewed by the ADRC of SW WI Joint Management Team 5-2009; Approved by North Governing Board 7/31/09, revised by ADRC of SW WI Joint Management Team 4-2010, Approved by North Governing Board 7/2/2010, revised by ADRC of SW WI Joint Management Team 1-2012. Reviewed and Approved by North Governing Board 2-2012.

10/2012 ADRC Name Change: ADRC of Eagle Country; 7-2014 updates clarify the difference between follow-along and follow-up, 5-2016 updated SAMS-IR procedure

5/2020 Policy updated to align with State Policy, most changes in the section related to when to follow up and when to not follow up

6-26-20 Update Approved by ADRC of Eagle Country Governing Board. 3/2023 Updated to reflect title change from "I&A" to "ADRC Specialist"

Annual Review Dates:

Reviewed by Managers 3-2013 / deleted "North in "Approved by.." added "Eagle Country"

Reviewed by Regional Manager 5-2014

Reviewed by Office Managers and I & A Staff 7-2014

Reviewed by I & A Staff 5-2016