ADRC Data Collection Tool
Service & Reporting Definitions
DRAFT
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ADRC as Trusted Source of LTSS Information and Access to Services

ADRCs specialize in information from a broad perspective, referral between a wide array of organizations and public awareness of LTSS options (I&R/A). To fulfill this function, the ADRC partners work together to develop and promote highly visible and trusted call centers and California ADRC intake locations where people of all ages, disabilities, and income levels know they will receive objective and unbiased information on the full range of LTSS options. Partner organizations are also defined by their shared ability to promote awareness of the various options that are available in the community for consumers in need of LTSS, individuals who want to plan ahead for their long-term needs, caregivers who are planning on behalf of their loved ones, and professionals who specialize in this planning. The ADRC model brings together health care and social support systems to enable I&R/A professionals to quickly identify which of a caller's needs are most pressing (for example, shelter, food, health, or safety) and connect them to the appropriate Critical Pathways Providers.

Report Definition - Total Contacts made to ADRC this period: This refers to total contacts made to the agency for information, assistance or referrals. A contact is a call, walk-in, email, text. It is counted each time an individual reach out for information, assistance, or referral.

Example: If a duplicated person calls 5 times, 5 contacts are counted. Also, if 10 referrals are given at each contact, you will still only record it as 1 contact.

AAA Guidance: Report all unduplicated Information & Assistance contacts in the appropriate category.

ILC Guidance: Report all duplicated Information & Referral contacts in the appropriate category.

MIPPA Guidance: Is not currently collected this category unless it is contractually required in a local agreement.

Category	Description
Contacts by Older Adults	Total contacts of individuals over the age of 60 years old.
Contacts by People with Disabilities	Total contacts by people of any age and with any type of disability including physical, mental health, sensory, learning, cognitive, etc.
Contacts by Caregivers	Total contacts by caregivers or family members of older adults or people with disabilities.
Contacts by Providers	Total contacts by providers, organizations, and agencies.
Contacts by Veterans	Total contacts by Veterans.
Contacts by SSI Recipients	Total contacts by individuals receiving SSI/SSDI.
Contacts by Medi-Cal Recipients	Total contacts by individuals receiving Medi-Cal
Contacts by low income individuals	Total contacts by low income individuals.
Other Contacts	Total other contacts that do not fall into the other categories or when demographics were not collected.

Enhanced Information & Referral/Assistance – ADRC Core Service

Report Definition – Enhanced Information & Assistance/Referral) made to ADRC this period:

One conversation (generally 5 minutes or more) with a caller or a person-to-person encounter that involves more conversation than furnishing a simple referral list or answering a direct question.

Do not count simple Q and A calls or simple referrals; for example, furnishing bus route information, locations of senior centers or the date/time of an event. Enhanced I&A/R is intended to benefit consumers with broad, system-wide information and referral/assistance (I&R/A) across many organizations for the purpose of minimizing the number of phone calls, intakes, applications, etc. necessary for that individual to find the services that meet their need. ADRC partners are cross trained and have

knowledge about services offered by a wide variety of service networks and providers.

AAA Guidance: Report all unduplicated contacts when specific information is collected about an individual, they are provided a broad choice of resources and guidance to obtain particular services.

ILC Guidance: Report all unduplicated contacts when specific information is collected about an individual, they are provided a broad choice of resources and guidance to obtain particular services.

MIPPA Guidance: Is not currently collected this category unless it is contractually required in a local agreement.

Extended Partners Guidance: Report all unduplicated contacts when specific information is collected about an individual, they are provided a broad choice of resources and guidance to obtain particular services.

Category	Description
Enhanced I&A/R for Older Adults	Total Enhanced I&A/R for unduplicated individuals over the age of 60 years old.
Enhanced I&A/R for People with Disabilities	Total Enhanced I&A/R for unduplicated individuals of any age and with any type of disability including physical, mental health, sensory, learning, cognitive, etc.
Enhanced I&A/R for Caregivers	Total Enhanced I&A/R for unduplicated caregivers or family members of older adults or people with disabilities.
Enhanced I&A/R for Providers	Total Enhanced I&A/R for unduplicated providers, organizations, and agencies.
Enhanced I & A/R for Veterans	Total Enhanced I&A/R for Veterans
Enhanced I &A/R for SSI Recipients	Total Enhanced I&A/R for SSI Recipients
Enhanced I &A/R for Medi-Cal Recipients	Total Enhanced I &A/R for Medi-Cal Recipients
Enhanced I&A/R for Low Income Individuals	Total Enhanced I&A/R for Low Income Individuals (Numbers to be added)

Category	Description
Other Contacts	Total other contacts that do not fall into the other categories or when demographics were not collected.

Short Term Service Coordination – ADRC Core Service

The goal of this service is to divert people who would otherwise be admitted to in a nursing facility, emergency room, hospital or other institutional option. This service can include crisis intervention with those with mental illness and those who are victims of suspected abuse. This service is intended to intervene until a longer term, person-centered plan is in place.

Short Term Service Coordination is a service that assists consumers who urgently need help with multiple services and programs, generally for 90 days or less, until a longer-term plan is in place.

Report Definition - Short Term Service Coordination (3 Months or less)

This service refers to individual receiving personalized service coordination for 90 days or less for the purpose of stabilizing a situation that has resulted in a person's risk for health, safety or welfare.

AAA Guidance: Report all unduplicated individuals who are provided with assistance with arranging and applying for community services and supports.

ILC Guidance: Report all unduplicated consumers who developed a goal and set and met their goals within 90 days or who waived an IL Plan.

MIPPA Guidance: Is not currently collected this category unless it is contractually required in a local agreement.

Extended Partner Guidance: Report all unduplicated individuals who are provided with assistance with arranging and applying for community services and supports.

Category	Description
Number of People	Total unduplicated individuals receiving Short Term Service Coordination services
Number of Referrals	Total unduplicated individuals receiving Referrals to community services and supports.
Number of Referrals that acted on	Total unduplicated individuals receiving follow-up referral services to ensure the individuals were connected with the referred services.

Outreach, Education & Enrollment

ADRC partners jointly develop community outreach and marketing plans to promote the organizations as highly visible and trusted places where people can turn to learn about the full range of LTSS options available to them. ADRCs also raise public awareness about these options.

The Medicare Improvements for Patients and Providers Act (MIPPA) provides funding to ADRCs to provide outreach to low-income Medicare beneficiaries to increase enrollment in Medicare low-income assistance programs. One major goal of MIPPA is the continued improvement of Medicare access and affordability for low-income beneficiaries.

Report Definition - Total Number of Outreach, Education and Enrollment Activities (may include info about LIS, MSP and/or Medicare preventative services)

AAA Guidance: Report all interactive presentations, benefit enrollment events, outreach booths or exhibits, one-on-one beneficiary contacts, Low Income Subsidy (LIS) Applications, Medicare Saving Programs (MSP) Applications, and total individuals reached through all outreach activities.

ILC Guidance: Report all interactive presentations, benefit enrollment events, outreach booths or exhibits, one-on-one beneficiary contacts, Low Income Subsidy (LIS) Applications, Medicare Saving Programs (MSP) Applications, and total individuals reached through all outreach activities.

MIPPA Guidance: Report all interactive presentations, benefit enrollment events, outreach booths or exhibits, one-on-one beneficiary contacts, Low Income Subsidy (LIS) Applications, Medicare Saving Programs (MSP) Applications, and total individuals reached through all outreach activities.

Extended Partner Guidance: Report all interactive presentations, benefit enrollment events, outreach booths or exhibits, one-on-one beneficiary contacts, Low Income Subsidy (LIS) Applications, Medicare Saving Programs (MSP) Applications, and total individuals reached through all outreach activities.

Category	Description
Interactive Presentations	Report all interactive presentations about LTSS related programs and services.
Enrollment Events	Report all benefits (MIPPA, CalFresh, etc) enrollment events.
Booths or Exhibits	Report all organizational outreach booths and exhibits.
One-on-One Beneficiary Contacts	Report all unduplicated beneficiary (Medicare, SSI/SSDI, MIPPA, CalFresh, etc) contacts.
LIS Applications	Report all unduplicated Low Income Subsidy (LIS) applications completed.
MSP Applications	Report all unduplicated Medicare Saving Program (MSP) applications completed.
Total Audience Reached	Report all unduplicated individuals reached through all outreach, education, and enrollment activities.

Options Counseling – ADRC Core Service

The person to receive services is at the center of the Options Counseling session and he/she alone may invite others from his/her social circle to participate. Options Counseling is similar to ILC goal and plan development. The person seeking services may only be absent if he/she delegates decision-making verbally or in writing to another person; OR, another person has been granted surrogate decision-making authority by a court of law; Conservatorship or Guardianship. The Options Counselor has been trained in and uses Counseling/Planning skills or similar skills such as Motivational Interviewing, active listening, reflective questioning and other techniques that empower the consumers to make informed decisions for themselves. The Options Counselor facilitates a consumer-directed plan of

action and follows-up to facilitate information, adaptation to unexpected changes and/or alternative solutions.

Report Definition –Options Counseling

One session of one-on-one person-centered planning (generally 30 minutes or more) providing objective, conflict-free, accurate and comprehensive information about LTSS options. One session is the beginning of a process of one or more sessions with one individual interacting with a trained Options Counselor techniques. Options Counseling session(s) must collectively include four components: Personal Interview, Decision Support, Personalized Action Steps and Follow-up.

AAA Guidance: Report all unduplicated individuals who are provided with Options Counseling by trained staff.

ILC Guidance: Report all unduplicated individuals who were provided with Options Counseling by trained staff and who developed an IL Plan which includes a 90-day or longer goal and action steps to meet that goal.

MIPPA Guidance: Is not currently collected this category unless it is contractually required in a local agreement.

Extended Partner Guidance: Report all unduplicated individuals who were provided with Options Counseling by trained staff.

Category	Description
Report Definition - Total Number of ADRC Consumers Provided Options Counseling this Reporting Period (in all settings and situations)	Total unduplicated individuals receiving Options Counseling services including people with disabilities, older adults, family members, and caregivers.

Transition from Institutional Settings

One or more organizations in the ADRC network provides individualized Hospital-to-Home or Nursing Facility-to-Home transition services. At minimum, one or more operating organizations provides nursing facility to home transition support either through the lead organization for Money Follows the Person (MFP)/California Community Transitions (CCT), the MDS 3.0 trained responder, Department of Rehabilitation Transition Fund,

or other transition support service. ADRCs looking to provide hospital to home transition services are encouraged to use the Eric Coleman Care Transitions Intervention (CTI) model, but other evidence-based interventions may also be used.

Report Definition – Transition from Institutional Settings

Service coordination to support individuals transitioning from Nursing Homes, ICF/MR, Hospitals, or other Institutional settings to community-based living.

AAA Guidance: Report all unduplicated individuals who were supported to relocate from a Nursing Home, ICF/MR, Hospital, or other Institution to Community Based Living.

ILC Guidance: Report all unduplicated individuals who set and met a goal in the significant life area of Relocation from a Nursing Home or Institution to Community-Based Living Community/Social Participation.

MIPPA Guidance: Is not currently collected this category unless it is contractually required in a local agreement.

Extended Partner Guidance: Report all unduplicated individuals who were supported to relocate from a Nursing Home, ICF/MR, Hospital, or other Institution to Community Based Living.

Category	Description
Number of Individuals Assisted by ADRC with Transition from Nursing Facility	Total individuals transitioned out of a skilled nursing facility regardless of age, type of disability, or how long they resided in the institution.
Number of Individuals Assisted by ADRC with Transition from ICF/MR into the Community	Total individuals transitioned out of a Intermediate Care Facilities for Individuals with Developmental Disabilities regardless of age or how long they resided in the institution.
Number of Individuals Assisted by ADRC with Transition from hospitals	Total individuals transitioned out of other hospitals regardless of age or how long they resided in the institution.

Category	Description
Number of Individuals Assisted by ADRC with Transition from Other Institutional Setting (e.g. psychiatric hospital)	Total individuals transitioned out of other types of institutions regardless of age or how long they resided in the institution.

Consumers by Age (Unduplicated, all ages)

ADRCs serve people of all ages, with any type of disability, family members, caregivers, and individuals of any income level.

Reporting Definition - Consumers by Age (Unduplicated, all ages)

AAA Guidance: Report all unduplicated individuals by age who were provided with Enhanced Information & Assistance/Referrals, Short Term Service Coordination, Options Counseling, and Transition from Institutional Settings.

ILC Guidance: Report all unduplicated individuals by age who were provided with Enhanced Information & Assistance/Referral, Short Term Service Coordination (goals set & met within 90 days or waived an IL Plan), Options Counseling (developed an IL Plan), and Transition from Institutional Settings (set and met a goal in the significant life area of Relocation from a Nursing Home or Institution to Community-Based Living Community/Social Participation).

MIPPA Guidance: Is not currently collected this category unless it is contractually required in a local agreement.

Extended Partner Guidance: Report all unduplicated individuals by age who were provided with Enhanced Information & Assistance/Referral, Short Term Service Coordination, Options Counseling, and Transition from Institutional Settings.

Category	Description
Number of ADRC Consumers aged 0 to 13 years old	Report all unduplicated individuals served between the ages of 0 to 13 years old.

Category	Description
Number of ADRC Consumers aged 14 to 24 years old	Report all unduplicated individuals served between the ages of 14 to 24 years old.
Number of ADRC Consumers aged 25 to 59 years old	Report all unduplicated individuals served between the ages of 25 to 59 years old.
Number of ADRC Consumers aged 60 and Over	Report all unduplicated individuals served over the age of 60.
Number of ADRC Consumers Age Unknown	Report all unduplicated individuals served who no age demographics were collected.
Number of Individuals with a Disability	Report all unduplicated individuals served with any type of disability.