

# 2019 Quarterly Client-Centered Case Management Report

Agency Name:

Colonial Club Senior Activity Center

Reporting Period:

Quarter 2 (April-June)

Reported by:

Gail Brooks, Case Management Coordinator

Phone & Email:

(608) 837-4611 ext.127 / gbrooks@colonialclub.org

Provide comments on:

## Emerging Trends (in our area during this quarter):

Increase in caregiver respite requests; seeing more children of parent(s) requesting this assistance due to working (or having to reduce work schedule to provide care) and taking care of their own family responsibilities.

Housing requests increase (primarily low-income housing) for people wanting to move to our service area to be near family. Also a number of urgent housing requests where client has 30 days to find housing (again majority needing low-income housing).

We had a few clients who had made changes to their healthcare coverage during the annual Medicare open enrollment that are now struggling financially to meet their living expenses. Also have shared that at times making choice to not seek medical care as frequently due to out-of-pocket expenses they now have with new plan. They shared that they wish they had made a more informed decision or truly understood the implications of signing up for a new plan.

Still seeing a number of requests for home delivered meals due to frailty and decreased ability provide good nutrition; also due to recent hospitalization and need for additional support (often are more short-term).

**Client Issues** (that require extensive time or for whom resources are limited or unavailable):

Consistent theme in our service area--Need for low-income housing (not what is being termed as affordable housing). Several of the referrals needed to find housing in a very short time period of 30-60 days. Landlord not renewing due to amount of back rent owed, family dynamics, death of spouse drastically changed living situation. Very difficult due to waiting lists--even for locations outside of our service area. Very time intensive and often many obstacles due to shortage of housing, poor credit history and eviction history.

Number of individuals counseled regarding reporting & repairing finances after a scam

Number of First Responders Dementia Forms completed

E-mail completed report by 10 April 2019, 10 July 2019, 10 October 2019,  
and 10 January 2020 to: [aaa@countyofdane.com](mailto:aaa@countyofdane.com)

# 2019 Quarterly Client-Centered Case Management Report

Agency Name:

DeForest Area Community & Senior Center

Reporting Period:

Quarter 2 (April-June)

Reported by:

Natalie Raemisch

Phone & Email:

846-9469 ext 608, nraemisch@deforestcenter.org

Provide comments on:

**Emerging Trends** (in our area during this quarter):

Lots and lots of HDM referrals. Many new people in general. Sometimes 3 or 4 in one day! Lots of people with dementia. Meeting people too late and then they cannot remember who you are. Reviews with the Consortium.

**Client Issues** (that require extensive time or for whom resources are limited or unavailable):

Clients going in and out of the nursing home or hospital. Discharge meetings are valuable to understand what is going on.

Number of contacts with seniors enrolled in Family Care, IRIS & Partnership Programs

Number of seniors leaving Family Care, IRIS or Partnership Programs and returning to our Case Management Program

Number of individuals counseled regarding reporting & repairing finances after a scam

Number of First Responders Dementia Forms completed

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# 2019 Quarterly Client-Centered Case Management Report

Agency Name:

Fitchburg Senior Center

Reporting Period:

Quarter 2 (April-June)

Reported by:

Amy Jordan

Phone & Email:

608-270-4295

Provide comments on:

**Emerging Trends** (in our area during this quarter):

Early onset Dementia- Several "younger" <65 presenting with Dementia. This requires a certain level of more hands on case-management and more time. Requiring assessments related to and acquiring an accurate diagnosis. Driving related issues that follow and whether or not to pursue a guardianship due to non-compliance.

Repeat hospitalizations after a discharge- Many being discharged after a hospitalization only to go back again after a poor discharge. Many needing more intensive care or rehab that would have prevented the repeat visit.

Evictions/non-renewals of leases.-Elders living with and without family who are facing evictions and non-renewal. Some are due to poor living habits or poor financial decisions.

*late*

**Client Issues** (that require extensive time or for whom resources are limited or unavailable):

early onset dementia without family in the area. this requires a lot of time and effort to make sure the person is safe.

Number of individuals counseled regarding reporting & repairing finances after a scam

3.00

Number of First Responders Dementia Forms completed

1.00

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# 2019 Quarterly Client-Centered Case Management Report

Agency Name:

McFarland Senior Outreach Services

Reporting Period:

Quarter 2 (April-June)

Reported by:

Lori Andersen, McFarland Senior Outreach Services

Phone & Email:

(608)838-7117

Provide comments on:

**Emerging Trends** (in our area during this quarter):

We have begun to see more homeless clients in our area in large part due to the weather. Since services are quite sparse in our service area homeless clients are not frequently seen in the colder weather months. Now that the nicer weather has arrived and we have an abundance of parks we see more transient people in our area. Our case manager, Sara Sprang, was involved in a rescue of an unresponsive homeless client she has been working with. Sara started emergency procedures with his wife and called 911. This client was to begin Hospice services. He survived.

We also have continued to work with numerous caregivers of loved ones who either have passed away or are placed. For them the journey of care giving has not ended and we continue the relationship as best we can. We have directed them towards the nearby support groups and have once again begun the discussion on starting one here. In the past the ability to have enough participants on a regular basis, including turnover, has made it challenging and unsuccessful.

**Client Issues** (that require extensive time or for whom resources are limited or unavailable):

We are seeing more family members, usually adult children of seniors ,who are just starting to explore services for their family member. Many times these are out of town visitors who want to meet with our staff ASAP, making it a challenge to see them on a timely basis during their visit. They often want services in place or conversations to occur with loved ones that can be very difficult and time consuming, especially when there has been no services in place prior. Many of these situations warrant immediate service planning. We have worked with Hospice on several of these most recently, including their At Home program. Sometimes the expectation for the family is unrealistic regarding ; the extent of services available at no or little cost, the timeliness of services such as LTC funding and support, or the limitations that some home services provide.

Number of individuals counseled regarding reporting & repairing finances after a scam

0.00

Number of First Responders Dementia Forms completed

2.00

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# 2019 Quarterly Client-Centered Case Management Report

Agency Name:

Middleton Senior Center

Reporting Period:

Quarter 2 (April-June)

Reported by:

Kathy Lauer and Jill Schonenberger

Phone & Email:

662-7686 jschonenberger@cityofmiddleton.us

Provide comments on:

**Emerging Trends** (in our area during this quarter):

We had an increase in the need for RSVP rides to ongoing appointments for chemo treatments, etc. Inquiries for MOWs has increased as well as inquiries about equipment in our loan closet. We continue to get requests for help with housecleaning. We do not have any extra funding for the SHC program at this time to add anyone new.

**Client Issues** (that require extensive time or for whom resources are limited or unavailable):

Kathy spent a significant amount of time working with a client who wanted to move to a different state. She worked for several weeks with DCHA to get his housing voucher transferred as well as worked with her client to guide him through the entire process.

Jill spent significant time with a client who was given a recent cancer diagnosis. This has been very devastating to this client as he has been very independent most of his life. Jill worked with client and his medical providers to help him get a better understanding of what this diagnosis means and exactly what he can expect in the upcoming months as far as treatments, etc. Jill served as an advocate for client to help express the concerns and frustrations he was having in regards to the way he felt the providers were managing his case and how he was being treated.

Number of contacts with seniors enrolled in Family Care, IRIS & Partnership Programs

Number of seniors leaving Family Care, IRIS or Partnership Programs and returning to our Case Management Program

Number of individuals counseled regarding reporting & repairing finances after a scam

Number of First Responders Dementia Forms completed

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# 2019 Quarterly Client-Centered Case Management Report

Agency Name:

NewBridge Madison

Reporting Period:

Quarter 2 (April-June)

Reported by:

Kari Davis

Phone & Email:

512-0000 x1003, karid@newbridgemadison.org

Provide comments on:

Emerging Trends (in our area during this quarter):

Newbridge consistently receives a high number of new referrals. During the second quarter we received 83 new referrals for case management and 49 requests for HDM assessments. At least 10 of the HDM referrals were for new clients, bringing the total of new referrals to at least 93 (case management new referrals and new HDM referrals). The total number of home delivered meal assessment referrals and case management referrals during the second quarter is 132.

Of the 13 case management positions, there are 3 Lead positions that do not have full case loads. Newbridge has 10 case management positions that are full time. We hired two case managers during second quarter and have one position currently open. Once trained, case managers are brought up to a full case load of 55-65 cases (full time). New referrals are assigned to case managers regularly and case managers are encouraged to close clients when there are no ongoing CM services.

The high number of new referrals means that case managers that already have full case loads are often given between 3-4 new clients every month.

We continue to provide ongoing support and training to case managers while trying to meet the high needs of our clients.

*late*

**Client Issues** (that require extensive time or for whom resources are limited or unavailable):

The clients taking up a significant amount of time (10+ hours of CM time in a month) continue to be those clients with mental health, AODA, significant health, housing issues, clients also working with EAN and those cases where guardianship or FCM referrals are needed.

We are always trying to make appropriate referrals to mental health CM programs & the ADRC for LTC assessments. Our focal point service area continues to focus on diversity & poverty and thus work with many older adults with complex care management needs.

Number of contacts with seniors enrolled in Family Care, IRIS & Partnership Programs

Number of seniors leaving Family Care, IRIS or Partnership Programs and returning to our Case Management Program

Number of individuals counseled regarding reporting & repairing finances after a scam

Number of First Responders Dementia Forms completed

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# 2019 Quarterly Client-Centered Case Management Report

Agency Name:

Northwest Dane Senior Services

Reporting Period:

Quarter 2 (April-June)

Reported by:

Vicki Beres, Case Manager

Phone & Email:

608-798-6937 ext 3 & casemanager@nwdss.org

Provide comments on:

**Emerging Trends** (in our area during this quarter):

- Increased need for Durable Medical Equipment (transfer & wheelchairs especially)
- SHIP counseling for those turning 65 and/or looking to retire; general options counseling, SSA.gov account set up and enrollment into Medicare A & B; options counseling regarding original Medicare, Advantage Plans, Medicare Part D plan finder options & Senior Care.
- Assistance with low-income housing application submission in NW Dane service area
- Increase in mobile meal inquires (some new enrollees and many just informational for aging parent and options to keep them in their homes)
- Increased referrals to ADRG for Family Care assessment
- Growing trend in homebound seniors in need of a peer support or volunteer program that would provide socialization, enjoyment of old pastimes like playing cards, reading, cooking or baking. Also need help with very light chores around the house like getting the mail/paper, putting up and taking down holiday decorations etc.

**Client Issues** (that require extensive time or for whom resources are limited or unavailable):

– Assisting a low-income client that was hoping to move down south; required research and assistance to partner with a local ADRC, senior center, housing, insurance change guidance and medical facilities in the area the client had hoped to move to. Due to current health conditions and need for specialist medical attention (currently provided at the UW), client decided to stay in this service area. Currently working with client to set up a SSA.gov account; we are having difficulties because the client cannot answer identity questions provided by the system administrator. This is necessary in order to apply for disability on line (goal is MAPP). Additionally, this client has mental health traumas that have lead to hoarding and not meeting housing/HUD inspections. Working with client to resolve this situation with support and resources.

– Assisting a MA hoarding client with physical disabilities, which are manifesting in mental health coping dysfunction to properly care self. Refusing help with clean-up process at this time; currently assisting with re-establishing MA benefits and usage, advocacy, paperwork (GDPU), mobile meals and other resources.

– Provided assistance to MA client and family with early-onset dementia diagnosis, transition to semi-independent apartment living with support from multiple transportation sources and NWDSS for a variety of needs. Set up ADRC Family Care assessment; client recently was enrolled.

– Currently working with a quadriplegic living independently; due to recent loss of spouse we've partnered with many local volunteer organizations and churches to help with a large list of things the client needs help with in order to maintain and stay in the home (additional in-home care; dead trees to be cut down; refuse in yard from Aug 2018 flood; porch, deck and gutter repairs, weeding & shrub trimming; in-home maintenance projects) etc.

Number of individuals counseled regarding reporting & repairing finances after a scam

55.00

Number of First Responders Dementia Forms completed

1.00

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# 2019 Quarterly Client-Centered Case Management Report

Agency Name:

Oregon Area Senior Center

Reporting Period:

Quarter 2 (April-June)

Reported by:

Noriko Stevenson and Carol Bausch

Phone & Email:

835-5801 & nstevenson@vil.oregon.wi.us cbausch@vil.oregon.wi.us

Provide comments on:

**Emerging Trends** (in our area during this quarter):

The OASC Case Management office is continuing to see a rise in the number of people needing assistance due to mental health issues. It requires case managers to do more frequent home visits and contacts with their family members and friends as well as their medical team.

Also, OASC is continuing to see an increase in the number of older adults who are seeking affordable/accessible senior housing. Case managers spend a significant amount of time in researching availability in the area.

As the number of seniors who live with dementia increases in our area, we spend time providing information regarding supportive home care agencies and private caregivers. We also are coordinating medication management with pharmacies in order to ensure proper medication intake.

**Client Issues** (that require extensive time or for whom resources are limited or unavailable):

OASC clients often face transportation issues. Many clients would like to participate in OASC activities, but are unable due to lack of transportation services. Transportation continues to be the one of the biggest challenges for older adults in the Oregon area.

Older adults here are facing a lack of senior housing. Even though they'd prefer living in the Oregon area, they end up having to look elsewhere to secure accessible, affordable housing.

Number of contacts with seniors enrolled in Family Care, IRIS & Partnership Programs

Number of seniors leaving Family Care, IRIS or Partnership Programs and returning to our Case Management Program

Number of individuals counseled regarding reporting & repairing finances after a scam

Number of First Responders Dementia Forms completed

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# 2019 Quarterly Client-Centered Case Management Report

Agency Name:

Stoughton Area Senior Center

Reporting Period:

Quarter 2 (April-June)

Reported by:

Hollee Camacho

Phone & Email:

(608) 873-8585, hcamacho@ci.stoughton.wi.us

Provide comments on:

**Emerging Trends** (in our area during this quarter):

- Limited affordable housing in Stoughton. Many clients are at imminent risk of homelessness or are homeless
- Substance abuse and a reluctance to seek counseling, treatment or AA groups. Many are wanting to do sobriety all by themselves.
- Illiteracy and medical illiteracy. People not knowing how to advocate for themselves and ask good questions and demand good answers from their health care providers.
- Undiagnosed mental illness, or mental health treatment is not meeting the level of severity of mental health issue
- Limited resources for clients under 65 we serve in the areas of financial and health services
- Bullying problems/being shunned in a local senior housing complex
- Client who cannot afford vision and dental care and medical supplies
- MTM transportation issues

**Client Issues** (that require extensive time or for whom resources are limited or unavailable):

- Dental issues
- Grief and loss issues, especially for caregivers after the caregiving has ended
- People unwilling to seek counseling and mental health support for their grief and adjustment issues
- Continued financial stress -poor choices in money management causing evictions, debt, inability to meet basic needs
- MANY AODA clients
- Undiagnosed mental illness clients
- Clients facing multiple health concerns
- Health care literacy, clients unable to read or comprehend their personal medical diagnoses, treatment recommendations or procedures
- Caregiver fatigue, and lack of/or caregiver not accepting support
- Severe hoarding case
- Eviction
- Affordable housing
- Transportation issues
- Medical competency/language barrier/illiteracy
- MAPP
- Medicaid and Medicare Issues
- SSI

Number of contacts with seniors enrolled in Family Care, IRIS & Partnership Programs

Number of seniors leaving Family Care, IRIS or Partnership Programs and returning to our Case Management Program

Number of individuals counseled regarding reporting & repairing finances after a scam

Number of First Responders Dementia Forms completed

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# 2019 Quarterly Client-Centered Case Management Report

Agency Name:

Sugar River Senior Center

Reporting Period:

Quarter 2 (April-June)

Reported by:

Angie Markhardt

Phone & Email:

608-424-6007 ext 104; angie.srseniorcenter@outlook.com

Provide comments on:

**Emerging Trends** (in our area during this quarter):

SRSC had an increase of HDM referrals during this quarter. These have been from two sources. Hospitals in the area are calling with referrals and we have an increase in clients from the Town of Verona as residents realize that we cover that area as well.

I am finding an increasing amount of clients who get too much money for additional aid but not enough to pay their bills etc. I have been spending a lot of time working with the consortium on renewing and applying for additional aid. The poverty choices of medication, food and everyday living is difficult in a rural setting where the resources are more sparse.

**Client Issues** (that require extensive time or for whom resources are limited or unavailable):

In this rural setting we are also finding it more difficult to find enough resources as clients lose their drivers licenses. We are keeping the few that are able to work with RSVP to provide rides very busy and are short on other resources to use. Many of our clients live too far out of town to use resources readily.

Elder abuse- financial- is an issue that I am working with one person in particular here. The addition of being scammed online and by phone to a daughter that is extorting money has meant alot of hours with this case.

A group of seniors came to us with a housing complaint and while we are putting lots of hours into this case we aren't finding alot of resources to help these clients before going to the Dane county Housing authority.

Number of contacts with seniors enrolled in Family Care, IRIS & Partnership Programs

Number of seniors leaving Family Care, IRIS or Partnership Programs and returning to our Case Management Program

Number of individuals counseled regarding reporting & repairing finances after a scam

Number of First Responders Dementia Forms completed

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# 2019 Quarterly Client-Centered Case Management Report

Agency Name:

Southwest Dane Senior Outreach

Reporting Period:

Quarter 2 (April-June)

Reported by:

Lynn Forshaug

Phone & Email:

608-437-6902

Provide comments on:

## Emerging Trends (in our area during this quarter):

We continue to loan out adaptive equipment from our Loan Closet.

We called to remind seniors to come to the Senior Center for the Farmer's Market vouchers distribution. Even though they receive letters from the Area Agency on Aging, they still forget.

We met with a new gentleman who did not know why his health insurance, Tricare (through the military) hadn't covered his wife's dental work. Mary Kay called Tricare and found out that this coverage had been phased out. He could have signed up for a new plan, but said he did not get this notice. He cannot sign up for a new plan to cover dental care until November, for 2020 health care coverage.

Working with seniors to find decent and affordable housing in Mt. Horeb. Not an easy task.

Lynn helps a man who goes to Florida every winter and when he gets back in May, he wants help renewing his SOS Capital Care, SLMB and lot lease for his mobile home.

Working with our local RSVP Ride Coordinator to register seniors for an RSVP ride.

Getting two referrals for meals for seniors from Sugar River Senior Center, for seniors who are in our service area.

**Client Issues** (that require extensive time or for whom resources are limited or unavailable):

Mary Kay has been working with this senior for a long time. This lady has been needing lots of help with paying her bills, making sure she gets to the store for food, taking her medications correctly, etc. Her memory was changing for the worse very quickly. We made an appointment for the ADRC to come out to do an assessment and now qualifies for a Partnership Program.

Mary Kay has also been working with a senior who is having memory issues. She has not been driving, but wants to get her driver's license activated again. She is making appointments to see different doctors who will OK a new license. Her family is in charge of her finances and she doesn't like that. We did find out that the grandson had not paid her health insurance for two months, so she didn't have health or medicine coverage. We did get her on Senior Care. The grandson does not return our phone calls. Adult Protective Services were involved last year, but then released her since things were going OK. This lady would never agree to having an assessment through the ADRC for a partnership program, which could be a great help to her. She lives in a condo, with many of her neighbors concerned about their own well being, with her using her stove and oven and not remembering to turn them off. We continue to work with her and her next adventure.

Mary Kay worked with a lady for a couple of weeks, who needed a new oxygen provider. This lady was notified by the former oxygen company, not the insurance company, who was no longer going to cover the oxygen. Mary Kay made many phone calls to arrange all this, find a new provider that her insurance would cover, getting the doctor to get the order and info to the new company, etc. The new oxygen company and all of the equipment is now in place for this lady.

Mary Kay continues to work with a lady in subsidized housing who needs lots of repairs to her apartment and building. Inspectors have been out to inspect the building, but nothing seems to get resolved. Mary Kay and the senior have made many phone calls to the management company to see when things will be fixed.

Number of contacts with seniors enrolled in Family Care, IRIS & Partnership Programs

Number of seniors leaving Family Care, IRIS or Partnership Programs and returning to our Case Management Program

Number of individuals counseled regarding reporting & repairing finances after a scam

Number of First Responders Dementia Forms completed

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# 2019 Quarterly Client-Centered Case Management Report

Agency Name:

Waunakee Senior Center

Reporting Period:

Quarter 2 (April-June)

Reported by:

Melissa Woznick & Candice Duffek

Phone & Email:

849-8385 mwoznick@waunakee.com & cduffek@waunakee.com

Provide comments on:

**Emerging Trends** (in our area during this quarter):

We continue to have an increase in home delivered meal referrals.

The most provided information/resources were ADRC, Dane County Caregiver Grant & other caregiver resources, home care agencies, lifeline, housing, grocery delivery, RSVP Volunteer driver program, home delivered meals, senior center programs and transportation options.

During the 2nd quarter a program we spent a lot of time on was Caregiver services and Home delivered meals. The caregivers needed information on respite and transportation. This took a lot of time to coordinate the respite and rides to the Adult Day Centers. The other program home delivered meals has taken some time. So many new ones to meet, complete the paperwork and document on as well. In addition to seeing if need any additional services other than meals.

Clients are signing up for Medicare Advantage Plans that have \$0 monthly premium/high deductible and accrue high medical bills. They are seeking CM services needing financial assistance help.

We had more complex transportation needs this past quarter. Some of these involved those who were in need of on going weekly transportation for medical appointments that did not fit under the RSVP requirements. We were able to coordinate these rides with the assistance of the Dane County Transportation Center, a Home Care Agency and RSVP.

**Client Issues** (that require extensive time or for whom resources are limited or unavailable):

CM Melissa worked with a senior for the last few months for many hours on his loss of his Medicaid. CM met with contacted the Capital Consortium to find out why. Which was over income but if he paid his own Part B he would be under. So the senior requested that he pay the premium and not the state. He needs the medical coverage for his hearing aids. CM has met with him many times since the end of April to call to check the status of the Social Security withdraw. CM has spoken to the Capital Consortium, ADRC and Social Security. They all confirmed he is just waiting for social security to process the request. This senior is very impatient and is challenging. CM is hoping for a letter soon and then can help reapply for MA.

There was a fire on 4/8/19 at the Village Glen Apartments(subsidized housing), where several of our clients live. Our time was spent by providing assistance and resources to those that were displaced, as well as those that had significant water/smoke damage.

We spend more time on clients who have no family or support. Especially while there are going through significant health related issues. We are very involved with the hospital and nursing home placements/discharges. Coordinating and collaborating with services such as the medical clinic SW/RN ,home health services,home care agencies, grocery delivery, medication management, transportation and home delivered meals.

Number of individuals counseled regarding reporting & repairing finances after a scam

3.00

Number of First Responders Dementia Forms completed

3.00

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**Number of Individuals Counseled Regarding Reporting  
& Repairing Finances After a Scam**

	QTR 1	QTR 2	QTR 3	QTR 4	TOTAL
Colonial Club	4	9			13
DeForest	1	1			2
Fitchburg	2	3			5
McFarland	0	0			0
Middleton	0	0			0
NewBridge	3	0			3
NW Dane	45	55			100
Oregon	1	1			2
SW Dane	0	1			1
Stoughton	1	2			3
Sugar River	1	3			4
Waunakee	1	3			4
<b>TOTAL</b>	<b>59</b>	<b>78</b>	<b>0</b>	<b>0</b>	<b>137</b>

Number of First Responderes Dementia Forms Completed

	QTR 1	QTR 2	QTR 3	QTR 4	TOTAL
Colonial Club	0	2			2
DeForest	0	0			0
Fitchburg	1	1			2
McFarland	0	2			2
Middleton	1	0			1
NewBridge	0	0			0
NW Dane	3	1			4
Oregon	0	2			2
SW Dane	0	0			0
Stoughton	4	1			5
Sugar River	0	0			0
Waunakee	0	3			3
<b>TOTAL</b>	<b>9</b>	<b>12</b>	<b>0</b>	<b>0</b>	<b>21</b>