

# 2022 Quarterly Client-Centered Case Management Service Report

Agency Name:

Colonial Club Senior Activity Center

Reporting Period:

Quarter 1 (January-March)

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):

Definite increase in home delivered meal referrals due to increased frailty.

Increase in hoarding-related referrals.

Referrals requesting additional support in the home due to advancement of chronic diseases, particularly dementia-related. This also includes supportive options for the caregiver(s).

Increase in requests to obtain financial assistance for utilities, medications and rent. This is also resulting in clients experiencing high level of stress, in addition to everything going on regarding the pandemic, etc.

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

Subsidized housing options continue to be consistent referrals. This is very time-consuming as there are very limited resources in our service area for truly subsidized housing for older adults. We are currently working with a few clients who are close to becoming homeless due to increase in rental rates, plus other cost of living increases.

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

1.00

Number of First Responders Dementia Forms completed

0.00

**E-mail completed report by 10 April 2022, 10 July 2022, 10 October 2022,  
and 10 January 2023 to: [aaa@countyofdane.com](mailto:aaa@countyofdane.com)**

# 2022 Quarterly Client-Centered Case Management Service Report

Agency Name:

DeForest Area Community & Senior Center

Reporting Period:

Quarter 1 (January-March)

Reported by:

Natalie Raemisch

Phone & Email:

846-9469 ext 1608 nraemisch@deforestcenter.org

Provide comments on:

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

People needing assistance with paperwork for their tax returns. People needing help with appointments due to memory loss or no family available. Families needing education about memory loss and to provide them with realistic expectations. The number of people needing support/education about scams continues to be a major topic of conversation.

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

This past quarter we have had difficulty communicating with Energy Assistance. It has been difficult for people to get recertified or signed up, even with a CM help. We have seen an increase in assisted living facilities without enough staff or support for caregivers to feel comfortable. People needing housing due to non-renewals, buildings getting torn down, or losing their income. People on LTC programs but not getting supports from the teams. CM advocating for services or assistance for people on a LTC program. Increase need for transportation, greater than the space we have.

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

7.00

Number of First Responders Dementia Forms completed

0.00

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# 2022 Quarterly Client-Centered Case Management Service Report

Agency Name:

Fitchburg Senior Center

Reporting Period:

Quarter 1 (January-March) ▾

Reported by:

Sarah Folkers, Amy Jordan & Katie Bogucki

Phone & Email:

270-4290 sarah.folkers@fitchburgwi.gov amy.jordan@fitchburgwi.gov

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Provide comments on:

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

- Lack of affordable housing
- Hoarding
- Eviction
- Incapacity

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

1. Client with history of TBI due to fall, now experiencing additional neurological decline; at risk of homelessness due to eviction. SW was able to secure funding through Dane County EAN to pay for limited-term motel stay. SW and client completed functional screen with ADRC and client does qualify. SW assisted client in choosing program and MCO.
2. Client with dementia and alcoholism still decisional but unable to manage daily living. SW arranged for all monthly bills to be on auto-pay. Client has a cat who uses the carpet as a litterbox. Client has a friend who does grocery shopping; SW arranges and attends medical appointments. HCPOA will be activated in the near future.

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

2.00

Number of First Responders Dementia Forms completed

1.00

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# 2022 Quarterly Client-Centered Case Management Service Report

Agency Name:

McFarland Senior Outreach Services

Reporting Period:

Quarter 1 (January-March)

Reported by:

Lori Andersen

Phone & Email:

608-838-7117 lori.andersen@mcfarland.wi.us

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Provide comments on:

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

Clients that have fallen through the cracks and receive little to no services they require or our eligible. we also have seen an uptick in clients who have manage care but stil require case managment services. Several requests for younger (under 60 ) clients to receive home delivered meals , some involved with managed care .

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

We have had quite a few clients that require extensive services due to cognitive limitations, underserved, or no supports. This includes housing, financial management, guardianship, bankruptcy, medical care and diagnostic needs, and treatment followup. The case managers have also spent time trying to reengage families that are still loosely connected and guide them into making decisions with or on the persons behalf. It takes skill and time but our case managers have been fairly successful with some of the situations.

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

1.00

Number of First Responders Dementia Forms completed

0.00

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# 2022 Quarterly Client-Centered Case Management Service Report

Agency Name:

Middleton Senior Center

Reporting Period:

Quarter 1 (January-March)

Reported by:

Jill Schonenberger & Stacey Baik

Phone & Email:

Jill- jschonenberger@ci.middleton.wi.us &608-662-7686 Stacey-sbaik@cityofmiddleton.us 608-662-7687

Provide comments on:

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

Affordable housing and requests for low income housing continues to be a great need.

There has been an increase in time spent with clients filling out various applications for assistance with rent, energy, food, mortgage, & healthcare costs.

There has been an increase for requests to enroll into the RSVP ride program and other transportation programs.

There continues to be constant requests for DME from clients from our loan closet.

There continues to be an increase in walk-in office visits and phone calls to get resources and information regarding various things.

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

There has been an increase in the number of people requesting assistance with applying for food, energy, rent, mortgage, healthcare, and other financial assistance. We have been working with seniors living on a limited budget, and they are struggling to stay within their monthly budget. For a lot of the seniors, rent is a majority of what they spend their budget on. As affordable housing continues to be a challenge, we have been working to apply for programs that may help with manage their monthly budget by requesting financial assistance for rent. In addition to rent assistance, we have helped our seniors apply to other various programs to help alleviate the financial burdens of other living expenses.

Case Manager spent a significant amount of time working on guardianship process for client with significant memory loss and safety concerns. This was a very involved process that lasted over several months requiring time, attention, and advocacy.

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

Number of First Responders Dementia Forms completed

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# 2022 Quarterly Client-Centered Case Management Service Report

Agency Name:

NewBridge Madison

Reporting Period:

Quarter 1 (January-March)

Reported by:

Jennifer Brown and Jodie Castaneda, Case Manager Supervisors

Phone & Email:

608-512-0000; jenniferb@newbridgemadison.org; jodiec@newbridgemadison.org

Provide comments on:

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

Emerging trends for NewBridge Case Management includes, in order of need, 1) nutritional needs; this includes HDMs (Home Delivered Meals), access to food and Food Bridge requests; 2) Home Chore including both indoor and outdoor needs; 3) assistance with benefits; 4) transportation and 5) housing needs.

INTAKE: During Q1, NewBridge received a total of 382 intake calls/website submissions which includes those needing CM assistance and those just needing resource information only. Out of these 382 calls, 13 were prioritized due to EAN referrals or homelessness. The trends for all of 382 calls includes housing assistance, benefits assistance and home chore needs. Also out of the 382 calls, we had 12 referrals for Bilingual Case Management services. NewBridge continues to utilize a wait list for CM services due to high demand for assistance.

Home delivered meals: during Q1, NewBridge received 79 HDM assessment requests which includes both new assessments and re-assessments.

BILINGUAL CASE MANAGEMENT: Emerging trends specific to BCM include access to housing, home chore needs, nutritional needs and transportation. There are significant barriers for those seeking housing and benefits due to income limitations and lack of appropriate documentation/legal status. Home chore via NewBridge's program is limited by contract to the City of Madison and City of Monona residents so for those BCM clients who are outside of those areas, there is very little resource assistance.

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

GENERAL CASE MANAGEMENT: Issues that require extensive time or are lacking resources:

1. Housing-this continues to be an issue due to limited affordable housing options with many wait lists that can be months or even a year long. Time needed includes CM assistance with applications, housing services, any needed follow up.
2. Home Chore: this includes both indoor and outdoor services.
3. Benefits: CMs continue to assist with SSI/SSDI applications and any needed follow up.

BILINGUAL CASE MANAGEMENT: BCM services take extra time as the CMs often needs to translate mail, documents etc and also be the interpreter on the phone at times. Some BCM clients are also illiterate so the CM needs to read all mail for the client. BCM CMs also are culturally sensitive to the clients so extra time may be needed in order to provide this sensitivity. There are needs of BCM clients that may not have resources (those without legal status for example have difficulty accessing some benefits) so the CM must work extra to find resources for these clients.

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

2.00

Number of First Responders Dementia Forms completed

0.00

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# 2022 Quarterly Client-Centered Case Management Service Report

Agency Name:

Northwest Dane Senior Services

Reporting Period:

Quarter 1 (January-March)

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):

Durable Medical Equipment: increased need for wheelchairs and all equipment types for at home, after surgery recovery. Several community members looking for a place to donate larger items like hospital beds. It's my understanding there is no place in Dane County to upcycle large DME equipment items.

SHIP: counseled individuals this quarter who are turning 65, needing assistance with Medicare enrollments, social security retirement, Part B supplement options, Part D and/or Senior Care.

ESI: completed several energy assistance applications over the phone, paper and online. Challenged with older adults not keeping current social security benefit letters.

Assisted Living & Memory Care: families in need of options counseling regarding loved ones not able to continue to live in their community home or apartment.

SCAMs: saw an increase of grandparent scams and at home COVID testing kits (people calling seniors asking for Medicare number before sending out a kit)

PERS: increase in education of and resource options counseling for life lines (personal emergency response systems).

Meals on Wheels: NWDSS had 12 new home delivered meal clients in Q1

Transportation: we continue to see a shortage of volunteers to deliver meals on wheels as well as RSVP medical escort. NWDSS had 2 new dialysis community members seeking 2+ rides each each week to appointments, which stretched our resources in addition to other medical appointments.

Housing: affordable housing continues to be a struggle for rural older adults not wanting to move into a city.

Homelessness: NWDSS served 3 rural homeless at risk older adults

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

Hoarding: currently assisting 2 clients with hoarding issues. NWDSS was successful in obtaining EA grant funds to help one client with a positive outcome as the property manager threatened a 5-day quit notice after an inspection. The second older adult at risk had previously received EA funds in the past, therefore is not eligible. This client has Dementia, mental health and various other health concerns. Client does not follow various doctor's advice and increased self-isolation during Q1, leading to worsening conditions. Law enforcement, APS and Crisis have all been involved with no resolution; client refused to leave the home.

Coordination of services for a client who is malnourished, has some early-on set Dementia symptoms and is failing to thrive due to COVID and self-isolation.

Assisting a client with early onset Dementia, loss of driver's license, anxiety and depression required a lot of coordination of services.

SHIP assistance and coordination of services for a rural homeless couple.

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

14.00

Number of First Responders Dementia Forms completed

1.00

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# 2022 Quarterly Client-Centered Case Management Service Report

Agency Name:

Oregon Area Senior Center

Reporting Period:

Quarter 1 (January-March)

Reported by:

Carol Bausch and Noriko Stevenson

Phone & Email:

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Provide comments on:

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

Emerging trends include higher usage of loan closet compared to the last quarter.

Transportation needs increased since Covid restrictions lessened.

Informational assistance related to housing has increased in this quarter due to new senior apartment becoming available in the area in this coming up summer.

Also, the report of scams increased this quarter.

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

Oregon Area Case Managers have spent a significant amount of time providing services related to nutritional support and transportation in this quarter since the Covid restrictions have lessened.

Also case managers spent time making referrals to tax assistance locations.

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

4.00

Number of First Responders Dementia Forms completed

0.00

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# 2022 Quarterly Client-Centered Case Management Service Report

Agency Name:

Stoughton Area Senior Center

Reporting Period:

Quarter 1 (January-March)

Reported by:

Hollie Camacho

Phone & Email:

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

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Provide comments on:

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

-Long wait lists for low-income housing  
-Home health has a wait list and sometimes cannot get in for 2-3 weeks  
-Lack of assisted living options in Stoughton; and the options available have limited open beds, especially for Medicaid recipients

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

-Clients without family or with family who are not reliable or trustworthy

-Finding in-home care is difficult; few service agencies have enough staff or staff willing to travel to Stoughton and surrounding townships of our rural service area. This even makes it difficult to refer someone to MyChoice, because we can't be sure they will get the in-home care they need, and at the same time, they lose our service.

-Significant demand on staff time due to issues with illiteracy, low vision, cognition/educational barriers.

Difficulty in follow-through communications with Social Security.

Scam Articles:

Medicare related scams in January newsletter

COVID testing scams in March newsletters

1200 copies of the newsletter are printed monthly and they are also available by email and our website.

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

2.00

Number of First Responders Dementia Forms completed

3.00

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# 2022 Quarterly Client-Centered Case Management Service Report

Agency Name:

Sugar River Senior Center

Reporting Period:

Quarter 1 (January-March)

Reported by:

Angie MArkhardt

Phone & Email:

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

Provide comments on:

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

We have seen many people excited to come back to the Senior center. AS they come back for activities we can see a noticeable decline in health and abilities. The isolation that was imposed by the pandemic is noticeably more than just a social issue. We are seeing many more people who are more frail than previously as well as failing memory in more individuals than pre pandemic.

We have been a littel frustrated with the HDM menu and it's effects on our HDM clients. Understandably with supply chain issues the menus have been the same for the last few months. While we understand the issues facing the caterer we are hearing negative feedback from our consumers as well as lessening days or just taking a break completely. This for us is concerning as we are aware that the HDMs are important to their overall health. We unfortunatly can not always convince people to continue. I know this is not an area that we are able to make changes but it has been an emerging trend here.

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

Our main issue in the past quarters has been rides. We are finally coming out of that driver drought and are able to find our own RSVP drivers instead of sending clients to Dane Co Transportation. This is a plus.

With the decline that we have seen we have done more consults with clients on assisted living and memory care units.

The main place this quarter that it has been frustrating to find resources for is supportive home care. Providers are not willing to come to Belleville. We had 2 clients that were using Comfort Keepers, one is currently in a rehab unit and the other has gone to an assisted living. I had another client that was on a waiting list with Comfort Keepers and was unable to transition the care from the client that went off SHC to a new client. This has been an ongoing issue for us.

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

3.00

Number of First Responders Dementia Forms completed

2.00

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# 2022 Quarterly Client-Centered Case Management Service Report

Agency Name:

Southwest Dane Senior Outreach

Reporting Period:

Quarter 1 (January-March)

Reported by:

Lynn Forshaug

Phone & Email:

608-437-6902    swdaneoutreach@mounthorebwi.info

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Provide comments on:

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

We have been working with seniors in applying for Energy Services even into January. This is usually all taken care of by November, but there was some confusion with the program. Some seniors received applications in the mail from Energy Services and some did not. Trying to connect with Energy Services via phone was nearly impossible. We or the seniors would leave messages for this program and we wouldn't hear back for weeks or a month.

We worked with Goodwill Industries to set up free Tax appointments for seniors for February and March. The AARP program did not have volunteers to come out to the Mt. Horeb Senior Center for free tax preparation for the second year in a row. It all worked out well for seniors to come to the Sr. Center to pick up a packet of forms they had to fill out for the Tax Prep. and bring them back on their appointment day. The seniors met with the Tax Preparer and the paperwork was then taken back to Goodwill where it was prepared, reviewed and then picked up a couple of weeks later by the seniors.

Getting seniors adjusted to non-Covid procedures, while trying to keep staff, seniors and volunteers safe during programs and events at our Center with Covid still in our midst!

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

Lynn has been working with a senior who is 95, who just found out she has to move out of her duplex of 14 years, by the end of May, 2022. Lynn has taken her to visit two senior housing complexes in Mt.Horeb, since she has no children and isn't driving much anymore. She has also been helping her fill out applications for housing, which is very limited in our Village and Dane County.

Mary Kay (the main Case Manager) and Lynn have been working with a gentleman who is also in need of housing. We helped him apply at Senior Housing in town and after a lot of phone calls and paperwork, he was denied because he owes back rent where he is currently living. Both of these situations have taken a lot of time.

Lynn was working with a gentleman who was applying for Medicare. He was already deemed disabled. This took many calls to Badger Plus, Medicare and some different insurance companies. His wife passed last fall, so he is trying to get all of his affairs in place.

Lynn worked with a senior to renew her Senior Care Prescription Drug Plan and helped in applying for financial help through the UW Financial Assistance Program. An application along with proof of her income (tax forms, bank statement, etc.) has to be sent to the UW Financial Assistance program. Getting these forms for seniors is a big job, but well worth the benefit.

Mary Kay has been busy with seniors in getting the Nutrition Assessments completed with them. New seniors who are starting with congregate or home delivered meals have to fill out a nutrition assessment. The Home-delivered meal assessment can take about an hour to complete with a senior.

Mary Kay has also been working with two seniors to help them reapply for financial assistance through the UW Financial Assistance Program.

Mary Kay is working with a gentleman via the phone more, whose health is deteriorating slowly. He is spending more time at home and less time at the Sr. Center, but needs help in paying some of his bills, etc.

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

Number of First Responders Dementia Forms completed

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# 2022 Quarterly Client-Centered Case Management Service Report

Agency Name:

Waunakee Senior Center

Reporting Period:

Quarter 1 (January-March)

Reported by:

Candice Duffek & Melissa Woznick

Phone & Email:

608-850-5877 cduffek@waunakee.com

Provide comments on:

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

The most provided information/resources was for assisted living options, caregiver resources, cleaning services, CORE, energy assistance, grocery delivery services, home care agency options, homestead taxes, senior housing, transportation resources, senior center activities, snow removal options, turning 65, and the Waunakee Food Pantry.

Resource inquiries that are lacking for options to share:

1. In-home hair care services. This request is due to clients not being able to drive any longer or for health reasons.
2. Affordable cleaners. Many cleaning agencies are quoting people prices in the \$200 per visit range.

COVID-19

\*January we had several people who were either diagnosed with COVID or in contact with a family member who was diagnosed. This included clients who attend Senior Center for lunch and activities. Case Managers assisted with having them switched to Meals on Wheels for a short time. This entailed contacts with the clients, family members, and Nutrition Site Manager.

\*continue to assist RSVP riders with obtaining COVID-19 proof of vaccination so they can utilize the RSVP transportation program.

\*We made referrals for the AMI Homebound COVID-19 boosters. Calling the ADRC with the client, providing information on when they had their 1st and 2nd dose, and being in-touch with the client on when AMI schedules the vaccine in their home.

Homestead Credit & Tax Appointments - The first couple of weeks of January are busy with clients wanting to make their tax appointments and needing assistance obtaining their Rent Certificates for Homestead Tax Credit. February and March we are busy reminding clients of their tax appointments, meeting with clients prior to their appointments to help them gather necessary tax documents and assist with completing their tax paperwork.

Medicare Part D - Even though Medicare Part D Open Enrollment ended 12/7/22, we received several Medicare Part D follow up calls in January. People having questions about their plans, billing, medication costs. We also had several Senior Care Renewals this past quarter.

Meals on Wheels continues to be one of the most requested services. This past quarter, we had numerous Meals on Wheels clients who canceled permanently due to moving to an Assisted living or had died.

We have made several referrals to the AAA Dane County's Elder Benefits Specialists Welcome to Medicare Seminars and the Free Legal Services Clinics.

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

Supportive Home Care - We had four clients who ended service with Brightstart 12/31/21 (due to contract ending with Dane County). This change has entailed several hours coordinating services with a new agency, Dane County, and clients. We then had billing issues with Cairasu. When our client's were authorized to have 4 hours of service, they were billing for 16 hours. After collaborating with Dane County to see what was happening, it turned out Cairasu was billing in 15 mins and the Senior Center was in hours. The issue was resolved, but we spent a lot of time talking to SHC clients about when the worker was there and for how long to try to figure out the reporting issue.

Assisted several seniors that were on Patient Assistance Programs for medication reapply for the programs. Yearly the programs want up to date financial information. These programs request details and sometime the senior can forget to send in every requested document necessary. This is a time-consuming process but crucial for the senior to have the medication.

Assisted a senior to apply for Social Security Benefits online. CM had assisted him in the past with enrollment into Medicare online. The process is simple but time consuming and you must make sure you have all the necessary paperwork. CM successfully helped him apply and he will wait to hear back from the Social Security Office.

Several seniors are having to move due to several reasons and finding reasonable housing is exceedingly difficult. There is waitlist for the affordable and no reasonable rents that would be their 30% of income that should go for rent. The rents are more like 50-60% of their income. This has been a challenge and very time consuming to look for housing. It is cheaper outside of Dane County but then lack resources so a tricky situation for seniors.

CM assisted a client with applying for subsidized housing apartments April 2021. Case Manager contacted 11 subsidized housing apartments to see where client was on their waitlists. One apartment building shared that he was #130 out of 230 and that they are working on applicants from 2019, estimated 2 years from now will be at the top of the list. Another said he was #58 on the list. Most said it's 2-3 years from the time they receive their application. One Management company, told me that he had to re-apply every 90 days (which Case Manager has never heard of). So, we had to fill out another lengthy paper application and fax.

Energy services has not offered in-person appointments since February 2020 (due to COVID). They are offering phone appointments. We have several clients who rely on Energy Assistance (over 30). This past quarter we checked with our clients to see if they re-applied this heating season. In January, CM and client contacted Energy Assistance to schedule a phone appointment - she would have to wait until March. We ended up filling out several Energy Assistance applications, which is a time consuming process. The initial phone call, appointment to complete the application, obtaining the income verification, making copies, mailing the application, following up to see if they received their Energy Services credit and the amount. The average time it takes to help someone with their Energy Assistance application is about 2.0 hours.

We had a couple of clients this past month that were in hardship situations. We contacted a local organization and wrote up requests for financial assistance. This entails screening out all possible options for clients, writing up the need/request, contacting the organization, waiting to hear if the client(s) were accepted. Once we found out they were approved, then we coordinated with the organization on distributing the funds.

Food Share Renewals - Calling the Capital Consortium with clients to complete their phone interviews. Assisting them with getting the requested documentation, which is usually proof of income or medical costs. We are then assisting with obtaining those documents, picking them up, making copies, and faxing the requested documents. In a recent renewal - they only gave the client 7 days to get ETF documentation. This entailed another phone call to the Capital Consortium to request an extension.

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

7.00

Number of First Responders Dementia Forms completed

3.00

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