

# 2023 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 Manager

Phone & Email:

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## **Positive News:** (in our area during this quarter):

Due to the opening of a new 55+ housing complex in Sun Prairie, some of our clients have been able to move there and be in a safer building with entrance locks and other safety features; which many of them have been seeking. These clients are now paying much lower rent helping them tremendously to meet their monthly needs as well.

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

Referrals from family members who reside elsewhere regarding services for their parents due to increased frailty.

More involvement with Dane County ADRC as it relates to referrals to assess for eligibility for long-term care programs.

Another round of older adults needing to move and seek alternate housing as can no longer afford to stay where they are at due to increased rent.

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

Although stated above as positive news in our area regarding the opening of a new 55+ housing complex in Sun Prairie, low-income housing is still a major problem in trying to find resources that are available for clients in their community of choice.

The trend we have been encountering is that some of the new 55+ complexes are requiring tenants to show that their monthly income needs to be 2x to 2.5X the rental rate for a particular unit in order to qualify to pursue rental (i.e. 1 person making under \$24240/year is \$526.00/month so they would have to have monthly income of at least \$1315.00 to qualify.) There are a range of rental amounts so as the lower priced apartments are full, the monthly rental amount goes up resulting in higher income eligibility criteria.

This process can be very time-consuming as an increasing number of housing organizations request applications be done on-line and some clients do not have skills to utilize a computer or the Internet. Case manager is often very involved at this point, particularly for those clients who do not have support from family/friends to help with this process.

**Challenging/Rewarding Case of the Month**

A client that one of our case managers has been working with for several years reconciled with her daughter and has agreed to long-term care outside of her home. This has resulted in client living in a safer environment and receiving the level of care needed to support her in her new home.

Client struggled with AODA concerns impacting her ability to care for herself. Although tremendous advocacy took place through the years by the case manager and many other organizations, client continued to decline AODA treatment and other supportive options often resulting in welfare checks by the local police department and numerous 911 calls and hospitalizations.

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

2.00

Number of First Responders Dementia Forms completed

0.00

**E-mail completed report by 10 April 2023, 10 July 2023, 10 October 2023, and 10 January 2024 to: [aaa@countyofdane.com](mailto:aaa@countyofdane.com)**

# 2023 Quarterly Client-Centered Case Management Service Report

Agency Name:

DeForest Area Community & Senior Center

Reporting Period:

Quarter 1 (January-March)

Reported by:

Natalie Raemisch, Executive Director

Phone & Email:

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## **Positive News:** (in our area during this quarter):

We have new signs on our building to help people find us. We are working hard to get the word out to educate about resources. Natalie has been meeting with people in her new role to make sure to get the word out about what great work we do.

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

We helped 170 people with e-filing tax returns. This is always a very successful program for people. Our footcare has been consistently busy. People have been confused about the reviews due with the Medicaid unwinding process.

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

We continue to have more needs for transportation than we have availability for. People are trying to adjust to foodshare money going down after the pandemic.

**Challenging/Rewarding Case of the Month**

We have a house needing support with cleaning the home due to hoarding. In collaboration with the Village and a cleaning agency, we have been able to support this person for better living conditions. Stephanie has worked tirelessly to give this older adult options and independence. Both the village and the older adult have felt successes in this process.

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 2023, 10 July 2023, 10 October 2023, and 10 January 2024 to: [aaa@countyofdane.com](mailto:aaa@countyofdane.com)**

# 2023 Quarterly Client-Centered Case Management Service Report

Agency Name:

Fitchburg Senior Center

Reporting Period:

Quarter 1 (January-March)

Reported by:

Katie Bogucki, Sarah Folkers, Amy Jordan

Phone & Email:

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## **Positive News:** (in our area during this quarter):

- Assisted client and client's support team to acquire appropriate supports for client to continue to live at home
- Coordinated with police department to give a presentation on scams targeting older adults
- Despite the lack of a meal vendor for several weeks, our focal point was able to secure several restaurants to step in and supplement meals for congregate dining and home delivered meals so there was no lapse of service for our most vulnerable clients.

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

- Increase in need for wheelchair accessible transportation for several older adults who do not qualify for Paratranit services
- Increase in phone and internet scams targeting older adults

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

- Food share decrease resulting in some seniors not being able to afford groceries to last until the end of the month
- Lack of affordable housing for seniors: increase in calls from seniors who are no longer able to afford their rent
- Lack of available funding for supportive home care

**Challenging/Rewarding Case of the Month**

There is a client who has had 13 months of issues with her Social Security payments due to an issue with Social Security stating that she was over assets. In December, Social Security ended her payments and she was no longer able to afford her rent, groceries, or other bills. Her case manager assisted with writing several appeals and waivers to Social Security as well as finding resources for food & rental assistance so the client would not become homeless. Eventually at the end of March after filing the latest waiver and attending another meeting with Social Security, the client was absolved of any wrongdoing and received a back payment for the money that was withheld. The client was able to catch up on her bills and will be able to continue to live in her current apartment.

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

30.00

Number of First Responders Dementia Forms completed

0.00

**E-mail completed report by 10 April 2023, 10 July 2023, 10 October 2023, and 10 January 2024 to: [aaa@countyofdane.com](mailto:aaa@countyofdane.com)**

# 2023 Quarterly Client-Centered Case Management Service Report

Agency Name:

Reporting Period:

Reported by:

Phone & Email:

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**Positive News:** (in our area during this quarter):

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

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

**Challenging/Rewarding Case of the Month**

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 2023, 10 July 2023, 10 October 2023,  
and 10 January 2024 to: [aaa@countyofdane.com](mailto:aaa@countyofdane.com)**

# 2023 Quarterly Client-Centered Case Management Service Report

Agency Name:

Middleton Senior Center

Reporting Period:

Quarter 1 (January-March)

Reported by:

Jill Schonenberger

Phone & Email:

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**Positive News:** (in our area during this quarter):

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

We have had an increase in requests to attend the Forget-Me-Nots (memory loss) group.

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

We received several phone calls asking for tax assistance. Our appointments were full so case manager spent time looking for and referring clients to other resources for tax preparation.

We continue to receive several requests for Supportive Home Care services for in-home assistance with cleaning, etc.

Case Manager has experienced some difficulty with trying to contact Social Security to discuss benefits with clients. There have been several times when the call will suddenly disconnect so we have to call back and start all over again on hold. Hold times are extremely long. Most recently, we were told that there were no available in-person appointments showing up in the computer for the Madison location. So after waiting on hold for an hour, we were ultimately unable to just schedule an appointment for my client to meet with someone at Social Security.

### **Challenging/Rewarding Case of the Month**

Case Manager was able to apply for and secure hoarding funds to help a senior get her home cleaned out. She had been living in very cluttered and unclean conditions for several years. It was becoming a danger to her health. This was a huge step for her to take in asking for help. However, she is very glad she did and she is very appreciative of the help she received. It has changed her life and gave her a much better outlook on life.

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

0.00

Number of First Responders Dementia Forms completed

0.00

**E-mail completed report by 10 April 2023, 10 July 2023, 10 October 2023, and 10 January 2024 to: [aaa@countyofdane.com](mailto:aaa@countyofdane.com)**

# 2023 Quarterly Client-Centered Case Management Service Report

Agency Name:

NewBridge Madison

Reporting Period:

Quarter 1 (January-March)

Reported by:

Jennifer Brown and Jodie Castaneda

Phone & Email:

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## **Positive News:** (in our area during this quarter):

A client I've been working with since 2020 took legal resources I sent him and officially became a US Citizen!

The connection with the Food Bridge clients through DoorDash and StockBox is so helpful to ensure groceries get delivered to clients homes. It can take a lot of time to get the volunteer and client matched, due to the language barrier so this tool is truly making food access easier. I filled out an application on Tuesday, and by Thursday the clients had food delivered by DoorDash from St. Vincent DePaul Food Pantry.

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

**INTAKE:**  
NewBridge received a total of 124 intake calls/website submissions which includes those needing CM assistance. Out of these 124 calls, 17 were prioritized due to the Monona Hills fire, 18 were prioritized due to EAN referrals or homelessness. Also out of the 124 calls, we had 7 referrals for Bilingual Case Management services. NewBridge continues to utilize a wait list for CM services due to high demand for assistance.

**HOME DELIVERED MEAL ASSESSMENTS:**  
NewBridge received 104 HDM assessment requests which includes both new assessments and re-assessments.

**GENERAL CASE MANAGEMENT:**

1. Hoarding funds requests
2. Affordable housing access including homelessness and eviction prevention
3. Home Chore including both indoor and outdoor needs

**BILINGUAL SPANISH CASE MANAGEMENT:**

1. home chore needs
2. nutritional needs
3. 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.

**BILINGUAL SE ASIAN/THI CASE MANAGEMENT:**

1. age eligibility (seeing more and more younger Hmong adults, 25-45 y/o coming to seek services)
2. basic necessities such as food and household items
3. housing, homelessness, and past-due rent

Many of the new referrals need more than just case management. They need mental health support as well as caretaker support.

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

On March 18, 2023, the Monona Hills Apartments caught fire and all 70 units evacuated. All current residents of the apartment complex have been displaced. A number of these have been able to stay with friends or family members but there also have been a number who needed to shelter at the Red Cross Shelter at the St. Stephen's Lutheran Church in Monona. As of 3/31/23 no residents have been able to go back into their apartments and there has been no date given as to when anyone might be able to move back in. NewBridge Madison Case Managers began to immediately contacting those clients working with NewBridge already and then on Monday, 3/20/2023, case managers began staffing the Red Cross shelter to offer assistance. Case Managers assisted with resource/referral services, emailing Meridian Property Management (landlord), assisting with housing applications and assisting individuals to apply for the Section 8 Housing Choice Lottery as well as other assistance including advocacy in medication replacement with MD offices, pharmacies and insurance companies, and advocating for other housing services including the VA services and the ViSPDAT. As of 3/31/2023, 36 official referrals have come from the Monona Hills fire - 17 were assigned as a priority.

## GENERAL CASE MANAGEMENT:

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. This has also been complicated by the Monona Hills fire residents and their need for housing solutions.
2. Home Chore: this includes both indoor and outdoor services.

## BILINGUAL SPANISH CASE MANAGEMENT:

BCM services take extra time as the CM 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.

## BILINGUAL SE ASIAN/THI CASE MANAGEMENT:

The Hmong Institute (THI) continues to provide food boxes to it clients. Staff pack close to 1000 boxes per month with culturally appropriate produce and protein and these are either delivered or handed out to the clients. There also continues to be a need for mental health support at THI for its clients. CMs do a lot of reading/translating mail, scheduling appointments, and attending appointments for support and translation. Transportation is also an issue due to the client's language barrier.

# Challenging/Rewarding Case of the Month

Monona Hills Fire - assisting more than 40 residents - 36 became official referrals with 17 as a priority

A client was referred by his landlord to NewBridge due to impending eviction due to hoarding. CM immediately applied for the Hoarding grant after receiving estimate of work in the amount of \$4670. Bio-One was hired and completed their work to clear pathways and remove over 30 years of paper and books that client had collected. CM discovered that she was walking on a floor of books that was 4 books deep along with several inches of paper stacked on top throughout apartment. CM worked alongside Bio-One assisting client with letting go of books, magazines, and clothing. CM is working closely with manager of his current apartment to secure a year lease instead of a more expensive month-to-month lease while still continuing the help client let go of hundreds more books, magazines and clothing that no longer fits while having him apply for subsidized housing instead of market rate which is not sustainable for the client. A clean out had been done in 2019 however it had not been as successful. CM will be putting additional supports in place to assist client in maintaining his apartment and is very optimistic that client will continue to be able to downsize for a future move and will be far safer now that there are clear pathways.

CM contacted client 3/2/23 because the client was in the hospital and could not return home due the hoarding condition. CM got the client approved for hoarding funds within 2 weeks. The client was matched with a CCS case worker for more in-depth mental health support by the end of March.

CM is working with a couple that are both hard of hearing. They are limited in contact and struggle to make doctors appointments despite me writing out instructions on how to utilize the transportation resources. Due to both clients cancelling numerous times, the only way to conduct business with them is by doing unannounced home visits. The process CM is working on with both clients right now is setting up MyChart.

CM works with a client who lives with her adult son who potentially neglects Client. Client has zero income and is not eligible to receive any benefits such as FoodShare or Badger Care. CM and Katia, LD&I Program Coordinator, are working as best as possible to coordinate transportation to Client's doctors appointments and to get her basic needs met while living in this environment with her son.

CM is working with a bilingual client who realized at the last minute that he would be having an apartment inspection and needed assistance with home chores prior to the inspection. I had to find an affordable home chore vendor because of limited HC funds. Because of the short notice, this was even more challenging. I was able to locate a bilingual home chore vendor who was able to go to the client's home the same day and complete the job in four hours. This vendor charged a fee the client was able to afford. Because the home chore vendor was bilingual, the client and vendor were able to work together without a translator, and the client was able to successfully lead the cleaning of his apartment to his wants and needs in addition to meeting inspection requirements.

CM was able to get a financial assistant for one of our clients who doesn't have a SSN or any other ID through the Alzheimer's and Dementia Alliance of Wisconsin. The client's family and CM are still searching for home care companies, so they can choose the best option for them.

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

0.00

Number of First Responders Dementia Forms completed

0.00

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# 2023 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

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## **Positive News:** (in our area during this quarter):

A client successfully engaged with and is receiving Mental Health (MH) program services from New Bridge.

Pet Grant: two clients are currently set up to receive grant funds to help care for and keep beloved pets healthy. The pet grant awarded to NWDSS helps to pay for a variety of care and or visits to a veterinary office, including, but not limited to: heartwormer, shots, teeth pulling, medication, visits, medical procedures etc.

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

Reduction in Adult Day Program participants. This is due in part to an increased need for memory care and 24-7 care provided by a long-term care facility or nursing home.

NWDSS saw an increase in the number of people needing SHIP counseling for those turning 65, as well as Medicare 101 and Social Security A & B enrollment assistance. Anyone seeking counseling was provided AAA Medicare 101 Free Welcome to Medicare information, but preferred one-on-one office meetings for paperwork or computer assistance.

Several new client referrals from hospital/clinic/SNF social workers after long-term stay at a facility. SW seeking services: case management, transportation, meals on wheels, and in-home care.

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

Multi-complex client cases:

- Dementia client needing assistance navigating living alone, transportation guidelines, and medical appointments.
- Client with fire damage to home unable to find a repair company, also has medication management issues, and mild cognitive impairment.
- Number one request from clients this past quarter: in-home personal care, medication management, and cleaning services. Navigating this conversation and need took a lot of CM time this past quarter. The majority of clients or family members would prefer a private-pay individual and are not wanting to interview and engage with a larger company from the greater Madison, Middleton or Fitchburg area. NW Dane County is challenged with finding companies willing to serve rural Dane County and the nine municipalities we serve.
- Transportation to medical appointments: NWDSS is still feeling the after affects of COVID with regards to number of volunteers available to escort older adults to/from medical appointments.

**Challenging/Rewarding Case of the Month**

2-ESI applications (one online; one paper) completed; both clients successfully received heating assistance.

Pet Grant recipients are "over-the-moon" excited to learn of this financial assistance opportunity to help care for thier loyal and beloved family members.

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

5.00

Number of First Responders Dementia Forms completed

1.00

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# 2023 Quarterly Client-Centered Case Management Service Report

Agency Name:

Oregon Area Senior Center

Reporting Period:

Quarter 1 (January-March)

Reported by:

Noriko Stevenson & Carol Bausch

Phone & Email:

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## **Positive News:** (in our area during this quarter):

Client was able to secure housing in the "low income" housing complex and move away from abusive spouse.

Client was able to access funding to cover his delinquent property taxes.

Client was able to get housing in a nearby apartment building and away from the hostile environment she was living in at her apartment complex. Many issues in the community room and the complex.

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

Complex client cases with more than one diagnoses, like dementia and mental illness.

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

Finding housing that a client can afford. Some people left Oregon are due to high housing cost even within the housing complex labeled "affordable housing."

Bullying within a housing complex that is done when housing staff is not there and when others are not around to witness the situation.

**Challenging/Rewarding Case of the Month**

A client who does not have enough work credits to get social security and his disability case has been in process for a year, did get some help with his property taxes.

Client who makes enough money to pay his rent chooses not pay rent and use the money else where (giving it to a person that says he'll double his money) thus resulting in late rent payment. He has been awarded CORE support and now family is helping him. The plan is to set up automatic withdrawal for client.

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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# 2023 Quarterly Client-Centered Case Management Service Report

Agency Name:

Southwest Dane Senior Outreach

Reporting Period:

Quarter 1 (January-March)

Reported by:

Lynn Forshaug, Director

Phone & Email:

608-437-6902 swdaneoutreach@mounthorebwi.info

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## **Positive News:** (in our area during this quarter):

More seniors are attending more programs at our Senior Center.

We are now offering a Trivia Game Day and a Table Games Day, which is attracting seniors who have not attended programs here.

Many folks in the community are very generous in donating gifts, prizes and food for Bingo and paper towels, stamps, copy machine paper, etc.

We are getting younger seniors coming in and participating in programs like Tai Chi and euchre.

We have a great group of Volunteers who help us keep our programs running!

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

We are seeing more folks coming in to the Senior Center for FREE food like dairy products, bread, produce, canned goods ,etc. that we get from our local grocery store, Miller & Sons, every Wed., since the Food Share benefits ended at the end of February.

We are helping more seniors apply for Food Share, who have not been part of this program before but now qualify.

Our local Food Pantry (Neighbors Helping Neighbors) are also seeing an increase in participants since their benefits ended.

Many seniors are coming in for adaptive equipment because of upcoming knee and hip replacements.

We worked with seniors in connecting them with Energy Services.

Some seniors are experiencing increases in their rent and are afraid they may not be able to stay living in their. apts. if the rent keeps going up. They don't know where they will move to.

We have seniors being affected by Covid 19 again.

Many seniors are getting numerous calls daily, supposedly from Medicare. It is probably scammers trying to get valuable information from seniors who might slip up. We tell them to monitor their calls or hang up on the caller. I just talked with a senior in a municipality that we serve, who lost \$400,000.00 in a "Sweetheart Scam". She was recently widowed and no children. This scam took place over a six month period.

Helping a homeless man fill out applications for Food Share and subsidized housing.

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

Mary Kay spent many hours coordinating cleaning help for a gentleman who after an inspection of his apartment, was going to have eviction proceedings started if he did not get it cleaned in a certain amount of time. She finally found a cleaning person who did clean for his man. The cleaning person then waited for three weeks to be paid. She finally received payment after many phone calls to this man. This lady said she would not clean for him again, so we had to start looking for a new cleaning person. Mary Kay finally found a cleaning person who agreed to clean for this man. Mary Kay then started contacting this man's payee agency to see if they could send a direct payment to the new cleaning person to avoid a late payment from the senior. Many phone calls and emails were sent to the payee agency, who was not getting back to us. Mary Kay finally found out that the payee agency had a change of address and staffing. The agency agreed to send a direct payment to the new cleaning person after each cleaning time. The senior then changed his mind and didn't want the cleaning help. He thought he could do it himself and he also had his truck break down, and may have to purchase a different vehicle! This was very time consuming case!

### **Challenging/Rewarding Case of the Month**

A senior had an inspection of his apartment, in which he didn't pass. He had to have it cleaned in two weeks or the eviction process would be started. The apt. Manager and a representative from the company that owned the building did the inspection and were rude and very unprofessional during the inspection. He felt like he was being harassed and bullied. Lynn contacted Dawn Griffin of "Deep Home Cleaning" to come and do an evaluation of the apt. Dawn had worked with the Area Agency on Aging of Dane County in other hoarding and cleaning situations. (This senior used to have free cleaning help through the SHC program of Dane County before the Pandemic. When the Pandemic came, the services came to an end for everyone's safety. This man's health has also been deteriorating over time and was not able to keep up with the housework. BrightStar was the agency working with this man before the Pandemic. When the Pandemic started winding down, BrightStar decided not to continue their contract with Dane County. One reason was the shortage of workers not available to come to the rural communities). Claire P. sent a Hoarding Funding application for Mary Kay and I to complete and send back to Ms. Grimes. Dawn came and cleaned the apt. for this senior for two days and he was ready for his inspection on March 23! Mary Kay was at this man's apt. for the re-inspection, which took the apt. Manager and the representative from the company by surprise. He passed the inspection! We now have to get him to budget his money, so he can afford some cleaning help. (He has been on a waiting list for SHC services with Comfort Keepers and Community Living Alliance since Nov. 2022). Mary Kay did contact the owner of the apt. building to say how unprofessional the representative from his company was. He said they are not Social Workers and next time, they will follow their guidelines for inspections and not give residents any leeway.

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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# 2023 Quarterly Client-Centered Case Management Service Report

Agency Name:

Stoughton Area Senior Center

Reporting Period:

Quarter 1 (January-March)

Reported by:

Hollee Camacho

Phone & Email:

608-873-8585, hcamacho@cityofstoughton.com

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## **Positive News:** (in our area during this quarter):

We were fortunate to have a Volunteer Income Tax Assistance (VITA) Site in Stoughton again this year at our senior center on Saturdays during tax season. Many of our seniors take advantage of this free service.

We began renovation to the next door annex building that we acquired from the City. We are so grateful for the many donations and successful fundraisers that allowed us to raise \$200,000 for the renovation costs. We look forward to being able to offer more programming in the two large meeting spaces it will provide us.

Thanks to Murl for covering our RSVP medical ride requests and scheduling while we work to fill our site's RSVP Coordinator position.

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

Clients who have spent their whole lives in Stoughton have no where to go through Medicaid when they need long term care.

There are no in-home supports available through Medicaid.

We have had many cancellations of home delivered meals.

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

Isolated individuals with severe mental health issues.

Extensive time applying for disability, and all the follow-up paperwork that is required.

Getting health care POA's activated.

**Challenging/Rewarding Case of the Month**

A client came to the SASC with many challenges she was faced with, and just moved to Stoughton. She recently lost her son and was suffering from a tremendous amount of grief. She needed to set-up POA-HC, transportation, HDM's, finances and resources needed in the area. With the assistance with the SASC. We assisted with setting up HDM's, got her connected with RSVP, completed her POA-HC and got her connected with the grief group. The CM also connected her with a bank in town, who then assisted with POA-F. She is now settling in her new apt and feels at home with Stoughton.

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

5.00

Number of First Responders Dementia Forms completed

3.00

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# 2023 Quarterly Client-Centered Case Management Service Report

Agency Name:

Sugar River Senior Center

Reporting Period:

Quarter 1 (January-March)

Reported by:

Renee Lynch, case manager

Phone & Email:

608-424-6007 reneelynch.srseniorcenter@outlook.com

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## **Positive News:** (in our area during this quarter):

Our center is seeing an increase in foot traffic and activity at the center. We have had some new faces coming in the door to see what we are about.

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

Consistently seeing more needs for rides and less drivers.

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

We continue to struggle meeting all of the ride needs for our clients. We are seeing an increase in the need for rides but our driver pool remains small.

**Challenging/Rewarding Case of the Month**

We had a client that was a victim of a gift card scam. He was convinced to drive into Madison late at night to purchase multiple gift cards in high dollar amounts. He did contact his credit card company the following day but had already sent the photos of the gift cards with the bar codes revealed. We worked with Best Buy and his credit card company as well as the local police department attempting to cancel the gift cards before they were used. Unfortunately, they were accessed before we could cancel them but we were able to open a dispute with the credit card company and the client was able to be reimbursed for the amount.

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 2023, 10 July 2023, 10 October 2023, and 10 January 2024 to: [aaa@countyofdane.com](mailto:aaa@countyofdane.com)**

# 2023 Quarterly Client-Centered Case Management Service Report

Agency Name:

Waunakee Senior Center

Reporting Period:

Quarter 1 (January-March)

Reported by:

Candice Duffek & Melissa Woznick Case Managers

Phone & Email:

608-850-9877 cduffek@waunakee.com

## **Positive News:** (in our area during this quarter):

Received a call from a person who learned about Case Management Services from our Village Wide Newsletter. Situation: lives in own home, caregiver to spouse (has Parkinson's) limited income, high medical bills due to being on a low-cost Advantage plan. CM has assisted with applying for Energy Assistance, Senior Care (Level 1), UW-Health Patient Assistance Program. Referred and is receiving Area Agency on Aging of Dane County's Caring for the Caregivers Grants & WI APDA Parkinson's Grant. Connected to Senior Center activities and the Waunakee Senior Center's Parkinson's Support Group.

This past quarter, CM had completed and received two cleanings through the OAA Hoarding Grants (February and March). Both were contracted through Bio-One of Madison, who do an amazing job with their clients. The clients feel good at the end, when they have an organized, cleared of clutter space. But getting there can feel overwhelming when they have had a hoarded space for years. These individuals do not have family and physically were not able to do what was accomplished. The OAA Hoarding Grant has really made a great impact and we are very appreciative LeeAnn Grimm, Elder Abuse and Adults at Risk Supervisor, APS for all of her coordination of these funds.

CM was able to connect the caregiver (daughter) of a client to the AFCSP grant (\$2200) for respite by hiring a home care agency to help with her Dad weekly with in-home care.

With Case Management assistance several seniors received Homestead Tax Credit for the first time. Always nice to help seniors get money in their pockets that they were not expecting.

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

The most requested services/resources were information on Assisted Living options, Energy Assistance, Home Delivered Meals, Tax Clinic assistance, Transportation, Lifeline (PERS), Home Care Agencies, and Lawn Services for Spring.

We still get calls from Medicare Part D clients, especially in January. Typically with questions regarding their plans not sending their monthly bills or wanting to review their deductibles, since they are now going to the Pharmacies and having to pay their deductibles.

We have been consulting with more caregivers this past quarter, including spouses, adult children, and other family members. We have provided as a resource the Area Agency on Aging of Dane County's Caregiver Program and Grant as well as the AFSCP grant (if applicable). Our Caregiver Support Group has been very well attended and we have had some new members.

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

AARP Tax Clinic - this quarter, we assisted several people with their AARP Tax appointments. This could be from reminding them to make an appointment, writing a tax appointment reminder letter, helping them schedule transportation, assisting with getting their rent certificates, and making copies of documents. The day of the appointment, we assist them with completing their paperwork and making sure they have all their documents. These tend to be clients who do not have family or anyone that assists them.

Energy Services – They have discontinued having in-person appointments since 2020 (COVID) for people to apply for Energy Assistance. The amount of work for CM has increased due to this. This past quarter we have continued to assist clients with their applications. This includes scheduling appointments to complete online or paper applications, making home visits to get the income verification, making copies, mailing the applications with their copies. We hope that they will go back to on site appointments next fall.

Housing- looking for low income housing for a senior that can pay no more than \$600 a month. Long waitlists for places and no new affordable housing.

Unwinding of the pandemic funds. Seniors are realizing now that their foodshare benefits are much less than what they were receiving. Several inquiries about the local food pantry. Also seniors are receiving their renewal notices for foodshare/medicaid and these take time to explain. Seniors are asking for help with these reviews because they are nervous that they have not had one in so long.

**Challenging/Rewarding Case of the Month**

CM had made a home visit with a new client at the end of January. CM had noticed that she had been receiving pill packets from Amazon, and had not been taking her medications since July 2021. She had a significant amount of prescription medications, and I didn't think it would be safe for her to just start taking them again, without consulting with her Primary Care Doctor. I had made a call with the client that date to her Primary Care doctor's RN, scheduled an appointment, coordinated a RSVP ride for the following week to review her medications. I had also let the RN know that the pill packaging system did not work. CM had just 1 month prior connected the client with a local pharmacy when she needed an antibiotic delivered, since she recently stopped driving. CM had let the RN know that they could have her prescriptions sent to this pharmacy and that the client would be interested in having that pharmacy fill her medications in a medication for her. I had thought this was something that should've been fairly easy for the clinic to coordinate, but it ended up taking several phone calls and over a month with the Primary Care doctor's Social Workers, RNs, the local pharmacy and daughter to get coordinated and arranged. For the month of March, the client has had her medication boxes filled, delivered, and has thought that it has been working well. This is the first time in months, that her medication has been taken as prescribed, and this is because of our Case Management Services.

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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# 2023 Quarterly Mental Health Resources Service Report

Agency Name: New Bridge Madison  
Reporting Period: January, February, March  
Reported by: Kathleen Pater  
Phone & Email: 608-512-0000 [KathleenP@NewBridgeMadison.org](mailto:KathleenP@NewBridgeMadison.org)

**Emerging Trends:** (in our area during this quarter): During this quarter we noticed an increase in clients experiencing a major life transition including death of a loved one and eviction/loss of housing. We are also seeing an increased need for assistance with cleaning/hoarding. We have a consistent amount of clients struggling with substance abuse as well. We did see a general influx in referrals and have had to schedule initial assessments out a few weeks due to this. This has been our busiest quarter yet.

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

During this quarter clients that displayed self-neglect or who were refusing medical appointments were challenging for our team. Working with clients that have Schizophrenia and are refusing mental health treatment generally takes more time from our team. Clients who are needing help with hoarding tend to be a longer time commitment as well. We are struggling with cases that need to be referred to APS not being picked up because they are already connected to case management. These clients are typically at a point of needing a cognitive assessment to determine if they would benefit from a guardian (often self-neglect).

**Number of individuals enrolled in therapy:** 78% of clients served in this quarter connected to therapy/psychiatry.

## **In-Direct Service (Consultations with Case Managers)**

Clients = 35

Hours = 177 direct service hours, 55 non-direct (consults, trainings, meetings)

## **Groups:**

3 Debrief groups

Focal point meetings: Waunakee, SW Dane, Oregon.

Crisis Summit presentations

Nutrition Program - Managing difficult behaviors

Present after Monona Hills fire

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