

2017 Quarterly Client-Centered Case Management Report

Agency Name:

Colonial Club Senior Activity Center

Reporting Period:

Quarter 4 (October-December)

Reported by:

Gail Brooks, Case Management Coordinator

Phone & Email:

837-4611 ext. 127 / gbrooks@colonialclub.org

Provide comments on:

Emerging Trends (in our area during this quarter):

Emerging trends remain pretty consistent with last quarter. We are experiencing an increase in referrals requesting in-home supportive care to include meals, personal care, medication management, bathing assistance and socialization options due to increased frailty due to physical and/or cognitive decline. This also includes requests by caregivers for this type of assistance to help them in providing care. Caregivers also seeking respite care and other caregiver supportive options. A number of these referrals are coming from complex case management and social workers at the various clinics and home health agencies.

Served a number of Medicare beneficiaries through the annual Medicare Open Enrollment regarding prescription and healthcare coverage options.

Also separate from the Medicare Open Enrollment were a number of referrals for people turning 65 and requesting assistance with enrollment processes.

We have been assisting a family with getting healthcare, prescription and other benefits in place for a client who moved to our service area from Puerto Rico as a result of devastation from Hurricane Maria.

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

Limited resources: Lack of affordable housing options in our service area.

Extensive Time: Developing plan of care for individuals with cognitive concerns to provide for their safety and well-being is often time-consuming, particularly if there is limited support.

E-mail completed report by 10 April 2017, 10 July 2017, 10 October 2017, and 10 January 2018 to: aaa@countyofdane.com

2017 Quarterly Client-Centered Case Management Report

Agency Name:

DeForest Area Community & Senior Center

Reporting Period:

Quarter 4 (October-December)

Reported by:

Natalie Raemisch

Phone & Email:

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Provide comments on:

Emerging Trends (in our area during this quarter):

Needing low sodium meals for CHF. Low income individuals having difficulty make ends meet. Healthcare/supplements are increasing and income is not. icare/Care WI etc., not doing healthcare/Foodshare reviews.

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

Many people calling asking about light housekeeping in the home.. We need a home chore program!

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2017 Quarterly Client-Centered Case Management Report

Agency Name:

East Madison/Monona Coalition of the Elderly

Reporting Period:

Quarter 4 (October-December)

Reported by:

Sonya Lindquist

Phone & Email:

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Provide comments on:

Emerging Trends (in our area during this quarter):

Top needs in EMMCA's service area in priority order during 4th quarter of 2017 were:

1. Medicare Counseling
2. Energy Assistance
3. Affordable Senior Housing
4. Affordable In-Home Care Assistance
5. Home Chore/Affordable Cleaning Assistance
6. Transportation
7. Mental Health Services
8. Benefits
9. Caregiver Support
10. Socialization
11. Nutrition

Issues and trends that were new or more pronounced in EMMCA's service area during 4th quarter of 2017 were:

- a) Need for Medicare counseling
- b) Energy Assistance
- c) Housing issues (including homelessness, hoarding, running out of funds to afford current housing, etc.)
- d) Individuals with mental health diagnoses that have driven away their support systems and/or have mental fixations that block service plan progress
- e) Respite for caregivers/support persons
- f) Assistance with benefit applications /renewals (FoodShare, Energy Assistance, Medicare Savings Program)
- g) Loneliness and depression

During the 4th quarter of 2017, EMMCA's lead case manager worked with other staff to get the EMMCA database ready to roll out to the lead case managers at the other 3 Madison Coalitions. This involved updates to the database and writing a database manual. In addition all EMMCA case managers were working on Medicare Part D sign ups.

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

Client issues that do not have resources to match the need in 4th quarter 2017 in EMMCA's service area:

- a) Affordable housing/subsidized housing
- b) Affordable medications when there are no generics
- c) Affordable in-home care agencies
- d) Affordable and reliable transportation to non-medical events
- e) In-home mental health counseling
- f) Fragmentation of care across settings (hospital to home, clinic to community social worker, etc.)

Client issues that required extensive time in 4th quarter 2017 in EMMCA's service area:

- a) Assisting clients with dementia who do not have family involvement. Attempting to assist client with preserving independence as long as is safe, but ultimately having to assist with guardianship process
- b) Working with individuals that hoard. Getting their home sorted out and sometimes having to set up new housing due to a non-renewal of lease from management
- c) Providing new to Medicare counseling
- d) Providing Medicare Part D counseling
- e) Finding subsidized housing for clients that have a time constraint (most have long wait lists)
- e) Assisting client's through transitions, including:
 - e.1) Setting up services after discharge from the hospital, especially difficult when clients decline physical rehabilitation in a facility or otherwise do not follow doctor's recommendations
 - e.2) Helping coordinate client moves from home to independent apartment
 - e.3) Talking through proactive Long Term Care planning with clients and helping clients and families determine what higher level of care is needed
- f) Working with individuals with mental health diagnoses that have difficult behaviors. Many have driven away their support systems. Many have ideas that they fixate on that inhibit their ability to think logically and see the bigger picture. When these ideas are based on delusions or are blown out of proportion, it becomes almost impossible to tackle service needs

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2017 Quarterly Client-Centered Case Management Report

Agency Name:

Fitchburg Senior Center

Reporting Period:

Quarter 4 (October-December)

Reported by:

Sarah Folkers

Phone & Email:

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Provide comments on:

Emerging Trends (in our area during this quarter):

Housing issues/homelessness prevention
Medicare Part D planfinders

late

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

Preventing our clients from becoming homeless requires extensive time. The lack of resources makes it an even more complex situation. We are fortunate to have a Special Needs Fund to utilize in certain situations; however, this funding is limited and can only act as a band-aid, not a long-term solution for our clients.

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2017 Quarterly Client-Centered Case Management Report

Agency Name:

McFarland Senior Outreach Services

Reporting Period:

Quarter 4 (October-December)

Reported by:

Lori Andersen

Phone & Email:

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Provide comments on:

Emerging Trends (in our area during this quarter):

The case managers have been dealing a lot with caregiver issues/stress. We have had a number of challenging clients with dementia/alzheimers which has made for numerous concerns regarding safety/finances/ stress relief. We have utilized all the available resources in handling these things on a somewhat ongoing basis which has helped but has not eliminated some of the issues. One situation we are heavily involved with the police department due to the use of a care track system.

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

We have had a number of clients with mental health concerns, some exacerbated due to family dynamics and coping with a loved ones declining health or increased needs. These are above and beyond normal caregiver stress and because we are familiar with them we know they have had mental health issues regardless.

We also have had some request for dental services. We have utilized our endowment money to help pay for services that would normally not be covered and which the client can not afford the whole out of pocket costs.

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2017 Quarterly Client-Centered Case Management Report

Agency Name:

Middleton Senior Center

Reporting Period:

Quarter 4 (October-December)

Reported by:

Jill Schonenberger

Phone & Email:

662-7686 jschonenberger@ci.middleton.wi.us

Provide comments on:

Emerging Trends (in our area during this quarter):

We are receiving more referrals and contacts from people who are on the younger side of the spectrum. Contacts with individuals in their late 50's and early 60's have increased in the last few months.

late

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

We have had a couple people new to our area that are not U.S. citizens and are looking for any benefits they could qualify for. However, the resources for them seem to be limited.

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2017 Quarterly Client-Centered Case Management Report

Agency Name:

North/Eastside Senior Coalition

Reporting Period:

Quarter 4 (October-December)

Reported by:

Susy Cranley

Phone & Email:

243-5252 scrانley@nescoinc.org

Provide comments on:

Emerging Trends (in our area during this quarter):

Frequent requests for information and assistance were for Part-D medical insurance, Caring for the Caregiver funds, affordable housing, transportation, Medicaid renewal assistance, Medicare supplemental insurance, isolation, and in-home chore assistance.

late

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

Our Case Managers have continued to receive referrals for complex cases with seniors struggling with issues such as hoarding, dementia, mental health issues, low cost housing, and medical care insurance coverage. Assistance for clients who are home-bound and isolated due complicated medical issues also continue to require extensive time for our Case Managers. Unfortunately, resources are also limited in this area for our low income clients, but the Caring for the Caregiver Grant has offered short term assistance and respite for these clients. NESCO currently has no wait list for Case Management services.

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2017 Quarterly Client-Centered Case Management Report

Agency Name:

Northwest Dane Senior Services

Reporting Period:

Quarter 4 (October-December)

Reported by:

Vicki Beres, Case Manager

Phone & Email:

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Provide comments on:

Emerging Trends (in our area during this quarter):

- Medicare Part D open enrollment (Oct 15 - Dec 7), assisted 88 clients
- SHIP counseling for those turning 65, spousal employment insurance ending; options related to stand alone plans (both supplement, Part D, Senior Care), vs. Advantage Plans; assisted with on line Social Security -- enrollments into Medicare A & B, or just Part B activation
- Social Security - Extra Help applications completed on-line
- Senior Care Renewals
- Food Share renewals completed by phone with CPDU
- CPDU consortium calls for Food Share renewal; paperwork assistant to enroll into MAPP; update SLMB renewal by phone
- Increased need for durable medical equipment for loan
- increase in reports of seniors with Dementia; caregiver burnout; many new referrals made to NWDSS Adult Day Program and use of Caregiver Grant Funds from AAA.
- Transportation challenges for those living in assisted living or SNF in need of transportation to medical appointments
- Increased need of in-home light housekeeping and yard work
- Low income people, not qualified to be in long-term care/partnership in need of light housekeeping and some bathing assistance (caregiver grant not applicable due to prior use of funds)

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

-- Conservatorship, Living Will, POA activation, move into Assisted Living -- year long effort, culminated during Q4; worked with a Dementia client living alone (no family or close friends) to procure a elder law attorney; worked with attorney, PCP and G&L Advocacy to establish a conservator of finance and activation of new POA for H&F, as well as a new Will; assisted with visits to several assisted living facilities as well as paperwork/wait lists. Facilitated move into CBRF with assistance of professional movers, Seques; finalized conservatorship in December/January.

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2017 Quarterly Client-Centered Case Management Report

Agency Name:

Oregon Area Senior Center

Reporting Period:

Quarter 4 (October-December)

Reported by:

Rachel Brickner

Phone & Email:

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Provide comments on:

Emerging Trends (in our area during this quarter):

Fourth quarter saw the case managers busy with Medicare Open Enrollment. The staff prepared many Part D Planfinders for seniors, as well as helped multiple seniors work through some complicated insurance situations. The staff worked closely with SHIP counselors with a number of seniors who had challenging insurance situations.

There were more than the usual number of hospital and SNF discharges that required arranging home supports in order for the senior to successfully transition back to living safely in the community. These involved arranging for home delivered meals, transportation, loan closet equipment, caregivers, etc.

Maybe this isn't a trend anymore, maybe it is an on-going ever-present reality, but we are always encountering more, often previously unknown to us, seniors with dementia who are living at home (usually alone) who have finally reached a crisis point and require intervention. These are also very time-consuming situations that could be listed in the response to the next question as well.

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

We have been running into the following needs that are difficult to find resources for:

1. Snow removal/yard work assistance for people on limited incomes.
2. Cleaning assistance for people who can no longer clean their own homes, but struggle to pay anyone else to do it for them.
3. Financial assistance for repairing or replacing dentures.
4. Financial assistance for purchasing orthopedic shoes.
5. Financial assistance for paying for hospital bills (seniors who are not old enough to qualify for Medicare are sometimes struggling with significant medical bills that providers are not always willing to write off).

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2017 Quarterly Client-Centered Case Management Report

Agency Name:

South Madison Coalition of the Elderly

Reporting Period:

Quarter 4 (October-December)

Reported by:

Kari Davis, CM Supervisor

Phone & Email:

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Provide comments on:

Emerging Trends (in our area during this quarter):

We had more activity in the last quarter of 2017.

In October we had 6 requests for HDM assessments and 6 new intakes. In November, we had 10 requests for HDM assessments and 15 new intakes. In December, we had 1 request for a HDM assessment and 10 new intakes. Of the new intakes this quarter, there were 4 people coming to us specifically for assistance with Med Pt. D.

Our wait list for case management services is currently 4 weeks. This is primarily due to having additional case management assistance from interns. We typically have one intern position over an annual period. In 2017 SMCE has had additional assistance from 5 other student interns.

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

The client's that are taking up a significant amount of case management time (10 or more hours of CM time in a month) are those with mental health, AODA, significant health, housing issues and those cases where guardianship or LTC referrals are needed. We are always trying to make appropriate referrals to mental health CM programs and the ADRC for LTC assessments.

In one case example, in the forth quarter of the year, we reported a large number of case management time for a client we worked with that has many complex case management issues. In the final quarter of the year the client had a fall and refused to go into a nursing home for a short term stay. At this time, the client also entered into a housing eviction due to bed bugs and roaches. The client has an activated HC POA, mental health needs (depression), dementia, poor physical health, housing issues and was going into a long term care program. In order to support the client through these issues and make a successful transition to a LTC program the CM and several other staff spent 49 hours on this case in the final quarter of the year.

2017 Quarterly Client-Centered Case Management Report

Agency Name:

Southwest Dane Senior Outreach

Reporting Period:

Quarter 4 (October-December)

Reported by:

Lynn Forshaug

Phone & Email:

437-6902

Provide comments on:

Emerging Trends (in our area during this quarter):

Carrie has been very busy working with seniors on enrolling them in Medicare D plans. She has also been working with families to get caregivers in place for seniors living in their own homes. She helped a gentleman who was turning 65 sign up for Medicare. We were busy delivering Christmas meal boxes from our local pantry to seniors in need. We deliver 19 food boxes from the CAC to local seniors every month. We worked with the local Giving Tree in getting gifts to seniors who are alone.

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

Carrie has been working for a few months with a lady who is needing help with cleaning and bathing services. Her income isn't bad, but she keeps cancelling these services because she says she can't afford it. Then complaints are coming from the neighbors and manager in her building about odors. We suggested to the daughter, to apply for the Caregiver Grant but they do not want an agency coming in, they want the private caregiver. The apartment complex has the option to not renew her lease if she doesn't comply with these improvements.

Lynn spent a lot of time working with a lady in finding new housing. The senior's rent was going to be doubling since the owner/landlord passed and this senior can't afford the new rent. I helped her find names and numbers of local landlords to check on rent costs, availability, applications, etc.

Carrie spent a few days trying to arrange for a senior to travel by bus and train to Illinois for Thanksgiving.

Carrie worked with a lady who was moving, to help cancel local accounts like telephone and utility.

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2017 Quarterly Client-Centered Case Management Report

Agency Name:

Stoughton Area Senior Center

Reporting Period:

Quarter 4 (October-December)

Reported by:

Hollie Camacho

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Provide comments on:

Emerging Trends (in our area during this quarter):

- Housing availability (subsidized/low income and handicap adapted) continues to be an issue.
- Dealing with several individuals with severe dementia, and needing to collaborate with multiple family members and area businesses and organizations to ensure client safety.
- Clients with multiple medical problems who are not always compliant with their care needs. Lack of good fall prevention strategies or poor nutrition leading to serious medical events or falls.

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

- Medicare Part D re-enrollment period: In total we conducted 93 Planfinders, saving clients a total of \$89,416 (difference between the existing and new plan's annual estimate of out-of-pockets costs)
- Many clients requesting help with finding affordable housing.
- Untreated AODA and mental health issues that interfere with clients ability to make good decisions is still a concern. Clients are often not willing or able to participate in complete sharing of information/history.
- Low income clients consistently making bad financial decisions and not wanting to change behavior. In turn they may communicate to the community that we were not helpful.

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2017 Quarterly Client-Centered Case Management Report

Agency Name:

Sugar River Senior Center

Reporting Period:

Quarter 4 (October-December)

Reported by:

Tressa Proctor

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Provide comments on:

Emerging Trends (in our area during this quarter):

CM experienced CM's busiest Medicare Open Enrollment for Part D season thus far. This does include new clients, but more-so CM spent extensive time with returning clients from the 2016 open enrollment period, as well as, clients whom are currently participating in the case management program for other reasons. CM felt a majority of the Plan Finders CM conducted this season were extra lengthy, including various medications that were not covered. Which then required extra time to connect with Medigap, drug manufacturers and in some cases clients needed to speak with doctors/medical professionals about finding a replacement drug that was more affordable.

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

CM's most prevalent issue affecting clients this past quarter remains the same as last quarter - which is the lack of available staffing within various home care agencies in our service area. CM continues to work hard to make connections with home care agencies who then attempt recruiting caregivers in CM's service area with little success. CM happily notes Right At Home home care agency has been able to service some of CM's clients within the Village of Belleville this quarter.

Transportation also remains a limited resource for our service area. CM feels CM is seeing more and more individuals struggling to find adequate access specifically to socialization opportunities. CM notes there are limitations within the RSVP Driver Escort Program that are in place to secure the program's funding for priority rides; medical appointments, trips to food pantry/grocery store.

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2017 Quarterly Client-Centered Case Management Report

Agency Name:

Waunakee Senior Center

Reporting Period:

Quarter 4 (October-December)

Reported by:

Candice Duffek & Melissa Woznick, Case Managers

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Provide comments on:

Emerging Trends (in our area during this quarter):

Continued increase in need for meals on wheels. More seniors home from rehab and hospital stays in need of meals on wheels for awhile.

We provided frequent information to seniors/families for Home Care Agencies, transportation options, supplement insurance resources, senior housing and energy assistance.

Had an increase in the overall number this quarter from last year at this time for Medicare Part D reviews. We together met with over 200 seniors for individual reviews. Also helped several seniors with SeniorCare Renewal applications.

Met with several seniors who recently turned 60 and who were in need of immediate services.

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

Request for housing/ resource for seniors who are homeless. The needs were immediate and very serious. Provided contacts for help with future housing but immediately found hotels for each. We provided local agencies that could supply food, gas money and personal supplies. In each of these cases if the seniors would have reached out when received eviction notice could have assisted in the situation. offered meals at the senior center and a place to be during the day. We spent alot of time following up with contacts for each of them. Huge stigma in service area that do not have homeless and we certainly do.

Coordinating with families services/activities for loved one that has dementia. We have met with several families this quarter whose loved one no longer drives but need socialization. This takes time to coordinate with family/senior the transportation/activity with reminders and check ins. A few new seniors who attend took several hours of time to get scheduled ironed out.

Several clients were either hospitalized, in the nursing home, returning home from the nursing home or moved. This involved coordination of either services being canceled or started such as meal on wheels, in home care and RSVP. It also entailed coordination with hospital or nursing home Social workers and families to help support the seniors in his / her transition where going.

Spent time with clients coordinating their Dialysis Transportation who were in/out of the hospital and nursing home.

2017 Quarterly Client-Centered Case Management Report

Agency Name:

West Madison Senior Coalition

Reporting Period:

Quarter 4 (October-December)

Reported by:

Elise Gokey, Maureen Quinlan, Joel Collins

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Provide comments on:

Emerging Trends (in our area during this quarter):

Medicare part D and general Medicare assistance.

GM's are involved with clients who need more in-home help than agency based volunteer home chore service can provide, but who lack the funds for private-pay in-home help.

An increased frequency of calls from seniors and their families who are planning to transition to assisted living housing.

Continued questions from clients and family members regarding long term care planning.

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

CM's continue to assist clients in trying to find affordable/disabled/low income housing in safe areas.

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