

# 2019 Quarterly Client-Centered Case Management 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):

Increase in referrals for individuals seeking assistance to see if there is anything available to help meet living expenses (i.e. medication, utilities, food, rent).

Although reported this last quarter, still are a number of referrals for individual(s) seeking in-home care due to increased frailty, particularly due to recent hospitalization.

Increase in request for home delivered meals.

Increase regarding medication management options due to concerns about taking medications correctly.

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

Limited resources and extensive time: Extensive time spent with homeless older adult seeking low-income housing with goal to live in Dane County--preferably in Sun Prairie. Also limited options for short-term housing/homeless shelter that meets the needs of frailty of older adult and a place where this individual feels safe at homeless shelter options.

Extensive Time: Clients with cognitive concerns and/or increased frailty impacting their safety and well-being in their home, particularly for those clients with no support system or very limited support. A lot of time with consistent contact via home visits and contacts with multiple agencies/primary support person to assist the client to remain in their own homes. More of an increase in providing overview of alternate housing options as a means of addressing the level of assistance needed due to safety concerns.

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# 2019 Quarterly Client-Centered Case Management Report

Agency Name:

DeForest Area Community & Senior Center

Reporting Period:

Quarter 1 (January-March)

Reported by:

Natalie Raemisch

Phone & Email:

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Provide comments on:

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

We have had several people diagnosed with cancer. This has lead to several family meetings and referrals to hospice agencies. Referrals resulted in ongoing communication with Hospice teams. We have also had several people get placed in assisted living facilities. Increased communication with numerous Clinic's staff regarding shared clients/patients.

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

We have had several individuals on Partnership/Familycare programs in need of DME equipment. We have also had people on programs inquire about help with paperwork. We have directed them back to their "team."

Interpersonal issues "Bullying" at independent senior apartment buildings. Supporting people that are being bullied.

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# 2019 Quarterly Client-Centered Case Management Report

Agency Name:

Fitchburg Senior Center

Reporting Period:

Quarter 1 (January-March)

Reported by:

Sarah Folkers & Amy Jordan

Phone & Email:

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

Provide comments on:

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

Affordable housing  
Health insurance options  
Financial hardships

late

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

A client is filing for Chapter 7 bankruptcy, and cannot afford an attorney. She was denied assistance through Legal Action of Wisconsin. The Social Worker printed off all necessary documents, and assisted the client with filling out the paperwork to the best of her ability. The client has a bankruptcy hearing, and the Social Worker will attend for support as the client does not have any family involvement at this time. This situation has required extensive one-on-one time with the client as a significant amount of information is needed for the process.

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# 2019 Quarterly Client-Centered Case Management Report

Agency Name:

McFarland Senior Outreach Services

Reporting Period:

Quarter 1 (January-March)

Reported by:

Lori Andersen , Director

Phone & Email:

(608) 838-7117

Provide comments on:

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

We have seen quite a few of our long term clients requiring referrals to other sources (hospice, assisted living, MCO) due to changes in functional needs.

We are still providing support to numerous caregivers who have been reluctant to access resources that we have informed them about. Many are spouses dealing with significant health issues of their loved one, and it is having negative consequences on their health as well. We have utilized the funding available for caregivers. But having them accept help continues to be a challenge. Some have unrealistic expectations regarding services that can come into the home, especially for little or no cost.

We have adjusted to the additional routes to our meal program and new clients.

We knew quite a few of them but some of them we did not. We struggled with the weather and delivering in an efficient and safe manner over the last few months. It took some creative thinking to get the job done. One example is we partnered with our EMS in delivering meals in the areas they serve. Unfortunately their service lines and ours don't match in some areas.

We also have adjusted to coordinating the RSVP medical rides for not only Pleasant Springs and Dunn, but for McFarland too. Not only did we add territory but we no longer have a volunteer handling it so our office now arranges the rides. Based on last years call log we are seeing double the call volume. In order to streamline the process our new case manager is responsible for this role. I do feel this is an area that may need to be looked at as the volume grows in our focal point and other focal points in which the case managers handle that role.

In order to better serve the needs of our clients we have eliminated dividing caseloads by territories or alphabet with the exception of Cambridge being under all one case manager. We have operated like this the past few years and recently formalized it with having a lead case manager and triaging services based on intensity and need. More routine services will be handled by our new case manager who also has other duties outside of the case manager role.

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

We continue to interface with our police department on numerous situations in which clients have extensive history of non compliance with medical or psychiatric follow-up. This necessitates more intense interventions such as taking people to appointments and more frequent contacts related to day to day affairs ie. money management, obtaining groceries. Families of these clients are generally not involved, dysfunctional or can't be relied upon for support.

As stated above I feel that RSVP ride coordination alternatives for our program may need to be explored in the future as going from volunteer based to department based has been an increased load. I know that other focal points have struggled with this as well. As the call volume grows, especially in the rural or non metro areas, transportation alternatives will need to be explored.

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# 2019 Quarterly Client-Centered Case Management Report

Agency Name:

Middleton Senior Center

Reporting Period:

Quarter 1 (January-March)

Reported by:

Kathy Lauer and Jill Schonenberger

Phone & Email:

662-7687 klauer@cityofmiddleton.us

Provide comments on:

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

We worked with many, many people needing equipment from our loan closet.

We also have added several individuals to our MOWS program.

We had a number of individuals come in wanting assistance with looking for work.

Oakbridge Apartments opened in our area which meant several new referrals for us.

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

We have had several individuals ask about housing, particularly lower cost apartments. There is perhaps one building in our area that had a few openings that is lower cost. Most people asking are looking for subsidized housing. There doesn't seem to be any in our area that doesn't have a wait list. I also received a call that Oakwood West will no longer offer the 30 subsidized slots that they have in the past once they start their updating of the campus on the West side.

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# 2019 Quarterly Client-Centered Case Management Report

Agency Name:

NewBridge Madison

Reporting Period:

Quarter 1 (January-March)

Reported by:

Kari Davis, Trainer/Technical Support Specialist

Phone & Email:

512-0000 x1003 / karid@newbridgemadison.org

Provide comments on:

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

In the first quarter of 2019, NewBridge has met with 800 unduplicated clients.

SMCE currently has two Social Work interns (they both started in September) helping with HDM assessments for South clients.

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

**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) continue to be those clients with mental health, AODA, significant health, housing issues, clients also working with EAN 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. Our focal point service area continues to focus on diversity and poverty and thus work with many older adults with complex case management needs.

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# 2019 Quarterly Client-Centered Case Management Report

Agency Name:

Northwest Dane Senior Services

Reporting Period:

Quarter 1 (January-March)

Reported by:

Vicki Beres

Phone & Email:

608-798-6937x3; cmnwdss@tds.net

Provide comments on:

Emerging Trends (in our area during this quarter):

## Medicare & Social Security - SHIP

--Increase in SHIP options counseling for those turning 65 or leaving employee/employer insurance. Many need help gathering materials and completing on-line Part A application, as well downloading, filling out and submission of Part B activation forms as well as Social Security Retirement application.

## Housing

--Low-income/subsidized housing is limited in NW Dane County. Clients with life event changes are challenged to stay in their home; i.e. if a spouse passes or there is a change in income.

## FC/Partnership

--Increase in number of clients referred to ADRC for intake and evaluation. Many are not meeting functional or financial screen, but cannot afford to pay for in-home or other care services in order to stay safe in their home.

## Transportation

--lack of options for nights and weekend events/outs; i.e. getting to church and other social functions.

## Dental

--other than WI Donated Dental Association wait list, there is a lack of options for lower-income seniors (those that are not MA) in need of routine check up and evaluation of general oral health needs.

## Technology

--increase in seniors with smart devices (gifts from family to stay in contact) as well as those without computers that need to set up e-mail to obtain apartments, set up on-line banking etc. NWDSS was approved for the Paul Kusuda special project fund to purchase equipment and set up a lab to meet client needs, both at the center and during home visits.

## Mental Health

--seniors in our area that continue to struggle with self-isolation and depression would benefit from a outreach service provider (not in a clinic setting) to meet and talk with about increased anxiety and tools to help with depression.

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

Senior with disabilities - taking advantage of and "drying up" resources (church, friends, neighbors; Case Manger - some resources used with no behavioral changes or positive outcomes; others not utilized and similar resources requested over a course of many years). Client is not able to face realities of situation and make appropriate self-care decisions and continues to make financially unstable decisions; grant options no longer available to this person; recently moved out of NWDSS service area.

Senior with hoarding issues, needed legal assistance and suffers from health, mental health and other cognitive challenges. APS grant money used to meet apartment code requirements; client is moving out of service area in July 2019.

Senior living alone with Dementia; required assistance with eye drop schedule for cataract surgeries and coordination of transportation needs, MAPP renewal and mental health counseling for depression, anxiety and OCD.

Two senior roommates with hoarding tendencies, health issues and cognitive decline experiencing domestic disputes and abuse; one of the senior clients, their family and CM contacted APS.

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# 2019 Quarterly Client-Centered Case Management Report

Agency Name:

Oregon Area Senior Center

Reporting Period:

Quarter 1 (January-March)

Reported by:

Noriko Stevenson and Carol Bausch

Phone & Email:

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Provide comments on:

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

The OASC Case Management office is seeing a rise in the number of people needing assistance due to mental health issues. It takes significant amount of case management time collaborating with client's primary care physicians and/or the local police department. Mental health issues required more case management involvement in this quarter.

Also we are continuing to see an increase in the number of older adults who suffer from dementia. Many who live with dementia remain living independently in the community and are often resistant to receiving assistance due to confusion and forgetfulness caused by dementia. Case managers spend significant amount of time in obtaining collateral information to achieve case plans for clients to remain living safely and comfortably. For example, we have older adults who case managers arrange transportation to the meal site. However, they do not answer the phone or doorbell, thus missing the ride, requiring OASC case managers to make extra arrangements with the older adult's family members and transportation companies.

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

OASC client often face transportation issues. There are many clients who wish to participate OASC activities; however, the lack of transportation prevents them from being able to participate in their preferred activities. Transportation continues to be the one of the biggest hurdles for older adults in the Oregon area.

OASC case managers spent time on older adults who are on Partnership. They are requiring more contact as Partnership agencies were not available to answer questions or coordinate services for their participants who receive services from OASC, such as home delivered meals or adult day program. For example, a person OASC delivers meals to was not home for the meal delivery. Case managers called the person, the person's family, and Partnership care manager. Case manager had to leave a voice mail for all these. Family did call back two days later and the Partnership called back the following week. OASC HDM is a way to check in with participants and ensure their safety. It took significant amount of time to confirm the person was okay and in the hospital.

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# 2019 Quarterly Client-Centered Case Management 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

Provide comments on:

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

- MTM transportation issues.
- Adult day care information and supports
- Limited affordable housing in Stoughton. Many clients are on the edge of homelessness.
- Substance abuse
- Undiagnosed mental illness, or mental health treatment is not meeting the level of severity of mental health issue
- Isolation, loneliness and reluctance to join senior center activities
- Limited resources for clients who are 55 years old, and experiencing multiple lifestyle/financial/mental health issues

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

- Difficulty canceling a Part D issues prescription payment, involving many phone calls with Medigap, ADRC, EBS Specialist, and prescription drug plan company's customer service.
- VA and dental issues
- Lack of funding for in-home care
- Financial hardships
- Transportation issues (2 clients)
- Affordable housing
- Citizenship paperwork
- Coordinating care due to AODA
- Coordinating care for home services
- Transitioning from hospital to home
- Caregiver fatigue
- Undiagnosed mental illness
- Medical illiteracy/Language barrier
- Clients facing multiple health concerns

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# 2019 Quarterly Client-Centered Case Management Report

Agency Name:

Southwest Dane Senior Outreach

Reporting Period:

Quarter 1 (January-March)

Reported by:

Lynn Forshaug

Phone & Email:

608-437-6902

Provide comments on:

Emerging Trends (in our area during this quarter):

We have been working on Nutrition Assessments and Release Authorizations.

Delivering about 18 CAC food boxes monthly.

Helping seniors fill out paperwork for the free tax preparation in March, 65 seniors benefited from this program.

Checking on seniors during the snow and cold emergencies and cancellation of meals and programs.

We have been giving out lots of equipment from our Loan Closet the last two months.

Working with some younger seniors who have come to the center and are experiencing some chronic illnesses and memory issues.

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

Mary Kay has spent lots of time working with a new client who is 69, now has a major illness and never had Medicare B. Mary Kay is working with the Consortium and Social Security with this client to get her signed up for disability and some assistance for her.

Mary Kay has been working with a client to get him a portable oxygen tank, so he can get out of his apt. more. The oxygen company he had been working with suddenly canceled with him, so we were scrambling to get another company. This new company wasn't returning phone calls, etc., but finally got him on the new plan.

Working with a gentleman who had a big ambulance bill. She and the client had to call New York's Actor's Guild to get a copy of his pension, to get proof of his complete income. She was also working with this man to get him out of some court appearances regarding health care for a brother-in-law.

Mary Kay has been working with a lady who received several phone calls that a package would be delivered by UPS. The senior thought nothing of it, thinking it was a package from one of her kids. A back brace was delivered by UPS from an address in Florida. She continued to receive calls to see if she received the brace. Mary Kay helped this senior call the Medicare Fraud program. This senior just received a statement from Medicare and this back brace had been billed and paid by Medicare. Mary Kay sent the Medicare statement and item billing statement to Medicare. This senior then received another Medicare statement with another billing, same first name (a foreign name) for both doctors. Mary Kay made a call to UW Health and the second doctor and statement were legitimate.

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# 2019 Quarterly Client-Centered Case Management Report

Agency Name:

Sugar River Senior Center

Reporting Period:

Quarter 1 (January-March)

Reported by:

Tressa Proctor

Phone & Email:

424-6007 angie.srseniorcenter@outlook.com

Provide comments on:

Emerging Trends (in our area during this quarter):

CM observed a trend in individuals requesting information for Energy Assistance and help applying for program funding. CM spent more time this Quarter than in past Quarter's with extra follow up because some of CM's clients didn't receive their annual Short Form in the mail. CM needed to make phone calls with clients to either request paperwork be mailed or do a phone interview. CM also notes a trend in individuals requesting help with accessing food, specifically, the local food pantry and Home Delivered Meals.

*late*

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

CM continues to help navigate transportation options for CM's client's spouse. CM's client is eligible by disability not age and is also a Veteran. His spouse (wife) is not age eligible nor has any disability, but is his primary caregiver. This woman has been looking for consistent help with transportation, but has not been successful in securing anything. CM has given various VA contacts, including Joe Miller with Vets Helping Vets. CM believes the spouse mostly needs local rides to complete basic necessity and food shopping. CM's client is unable to physically shop. CM has also informed client and spouse about local grocery stores ability to deliver groceries. CM notes spouse has most recently been looking into the senior center's bus service to see if she is eligible to use that on occasion. She is not eligible for RSVP rides at this time.

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# 2019 Quarterly Client-Centered Case Management Report

Agency Name:

Waunakee Senior Center

Reporting Period:

Quarter 1 (January-March)

Reported by:

Candice Duffek & Melissa Woznick

Phone & Email:

850-5877, cduffek@waunakee.com 849-8547 woznick@waunakee.com

Provide comments on:

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

The most provided resources/information were to the ADRC, cleaning services, Caring for the Caregiver grants, food share, home care agencies, homestead tax credit, respite options, housing, home delivered meals, transportation, senior center lunches/programs, tax clinics, Waunakee food pantry, and Waunakee neighborhood connection.

We continue to have an increase in new home delivered meals referrals. We also had several long time home deliver meal participants end, either to moving to Nursing Home, Assisted Living, or died.

This past quarter, several caregivers have met with Case Manager to discuss options of in-home care and adult day care. CM has assisted with setting up both in home and adult day care. It takes alot of phone calls and making arrangements. All of the caregivers are satisfied with arrangements and were very patient with the process.

We were closed 6 days this past quarter due to snow and extreme cold weather. This involved the Case Managers to make several phone calls to clients to let them know about MOW/Meal Site being closed, rides being canceled, and overall safety due to the extreme cold weather.

We have several clients who receive Food Share benefits. Their benefits were impacted due to the Government Shut Down. We wrote a letter in January and mailed to our clients regarding the early issuance of the February benefits, and provided them with local resources to help them stretch their food budgets. We also spent more time with on going updates, and verbally talking about the changes with our clients as well.

We provided assistance with benefit re-newals this past quarter. We had Food Share re-newel applications, Senior Care Renewal applications, and Capital Health Care renewal applications. One client's FS amount was raised to \$192 due to Case Manager having her include her medical bills in her Food Share application.

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

Spent many hours with a senior who moved from his family farmhouse to a senior subsidized housing. There were a lot of contacts that needed to be made to providers to change locations. CM also worked with local agencies like Waunakee Neighborhood Connection, TDS, Waunakee Utilities and other village entities. They all assisted in making the move easier for the senior who has known no other home than the family farmhouse. They all made him feel good about moving into town. CM also assisted with getting the senior on the SHC program to help him weekly in his apartment. This senior is enjoying his new home.

During the 1st quarter spent extensive time with clients with the AARP Tax Clinic, Supportive Home Chore Program, and transportation arranging.

AARP Tax Clinic - Our Senior Center had tax clinics every Tuesday for the month of February and March (20 appointments each week). We assisted numerous clients with their taxes. This included printing rent certificates for Homestead credit, telephone calls with clients regarding their appointments, helping clients gather needed documentation for their appointments, and coordinating transportation for clients. Met with several seniors before Tax appointment to help complete the forms and gather documents together for the appointment. This took on average 30-45 mins each. The seniors do have a hard time completing the forms and are nervous. By helping it puts their minds at ease that they are ready for appointment. One client applied for Homestead Tax Credit for this first time, after CM explained to him what it was, and he received over \$500 tax credit.

**SHC Program -**

The SHC program has taken some time to review the current clients and evaluate how many hours can receive with the funding. Then meeting with each to discuss the service plan. The seniors are very happy to have this assistance and so are we as Case Managers. It is well worth the time to provide this service to seniors.

**Transportation -**

We have been very involved with several clients and their transportation coordination. This has been with TSI coordinating transportation to and from the Senior Center for lunch and activities. And, with the the RSVP Driver Escort Program. Several of our clients have multiple medical appointments and on-going rides (adult day care). This has taken a lot of coordination and time with RSVP requests, confirming appointments, consulting with the RSVP Coordinator, and several phone calls with the clients and/or families related to ride schedules/changes etc. We were able to connect a client with the Dane County Transportation Center for rides to medical appointments, as he needs a wheel chair lift. He was very appreciative to receive their assistance.

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