

2019 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:

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

Provide comments on:

Emerging Trends (in our area during this quarter):

These trends remain consistent with last quarter:

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

Housing requests for subsidized housing also still remain consistent.

Requests for caregiver support and in-home care due to increased frailty and complex medical concerns.

New trend this quarter: Medicare annual open enrollment. In addition to Medicare D plan comparisons, there was an increase this year in comparing Medicare Advantage plans during the open enrollment. These were definitely more time consuming. Only one individual ended up switching Medicare Advantage plans. Assisted a couple of clients with switching from Medicare D to SeniorCare due to significant savings. The clients were not aware of SeniorCare as an option for prescription coverage. Also had a few clients where increased time was spent seeking other options available to help with cost of very expensive medication to help not only with cost but to potentially delay or avoid the coverage gap.

In addition to the open enrollment, we did have 2 referrals regarding turning 65 and 3 referrals with concerns relating to their current retiree employee coverage ending.

We had a couple of referrals regarding spousal relationships in conflict leading to potential safety concerns in the home.

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

Still remains a consistent theme in our service area--Need for low-income/subsidized housing. Very difficult due to waiting lists--even for locations outside of our service area. Very time intensive and often many obstacles due to shortage of housing, poor credit history and eviction history.

Time intensive: Clients with mental health concerns.

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

6.00

Number of First Responders Dementia Forms completed

0.00

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

2019 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:

(608) 846-9469 ext 1608

Provide comments on:

Emerging Trends (in our area during this quarter):

People needing help with technology (phone, computer, faxing, emailing etc.)

Medicare part D searches

Relocation help with housing. Help with paperwork, wait-lists, etc.

Poor money management

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

Hoarding problems and evictions
Needing insurance for dental, hearing, vision etc..

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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2019 Quarterly Client-Centered Case Management Report

Agency Name:

Fitchburg Senior Center

Reporting Period:

Quarter 4 (October-December)

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):

Medicare Part D planfinders

Financial assistance

Holiday nutrition resources

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

This year's Medicare Part D open enrollment period required more time than in past years. This was due to each person having to open a My Medicare account. Most people did not do this on their own prior to meeting with the Social Workers for a planfinder.

Financial and/or nutrition resources around the holidays is an annual issue for people. Because the Senior Center is closed over the holidays, Social Workers put in a lot of time connecting folks to holiday meals served at local churches, etc., as well as arranging for some folks to receive a home-delivered holiday meal from another local organization that remains open for this service.

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

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

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

Number of First Responders Dementia Forms completed

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2019 Quarterly Client-Centered Case Management Report

Agency Name:

McFarland Senior Outreach Services

Reporting Period:

Quarter 4 (October-December)

Reported by:

Lori Andersen

Phone & Email:

608-838-7117

Provide comments on:

Emerging Trends (in our area during this quarter):

This past quarter was largely spent on Medicare related concerns. We have a fair amount of individuals that require assistance with not only Medicare D but Senior Care applications. We were able to assist them in all cases without referring to the benefit specialists or Medigap helpline.

See below for cases that required extensive time.

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

We continue to have a regular group of clients that utilize our services in large part due to poor decision making skills. Several of their situations came to a critical point in that one was not renewed on her lease due to non payment . However she was able to secure housing elsewhere. A referral was made to the corresponding Focal point. The other situation was that our longest standing client finally transitioned to Managed Care. It was refreshing that Care WI recognized the amount of work we had spent on this client and included us in the transition. It will take some time before she will be use to calling her new team instead of us. It is hoped that she will be placed in an assisted living shortly. Another situation got resolved on its own when someone fell and was placed directly from the hospital. Our case manager tried for several years in recognizing the need for placement since the home situation was not sustainable. Our emergency medical services were there frequently. Home health agencies struggle going in due to marital discord. The spouse also has poor health and the family which is a his/hers situation want nothing to do with them. We are hoping this leads to a better quality of life for both.

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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2019 Quarterly Client-Centered Case Management Report

Agency Name:

Middleton Senior Center

Reporting Period:

Quarter 4 (October-December)

Reported by:

Kathy Lauer & Jill Schonenberger

Phone & Email:

662-7687 or 662-7686

Provide comments on:

Emerging Trends (in our area during this quarter):

We are working with more people who have some type of mental health issues. Often these people have very limited support systems. They often need more emotional support, reassurance and assistance organizing what it is they need to get done.

late

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

Medicare D!

Our loan closet continues to take a fair amount of time. We have many people using it-(a good thing) but our Volunteer Coordinator hasn't been able to find volunteers who are willing to clean & organize equipment so much of this has fallen to us. Unless a more long-term resolution is found, we will have to consider making some changes to our loan closet.

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

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

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

Number of First Responders Dementia Forms completed

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2019 Quarterly Client-Centered Case Management Report

Agency Name:

New Bridge Madison

Reporting Period:

Quarter 4 (October-December)

Reported by:

Jodie Castaneda and Jennifer Brown

Phone & Email:

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

Provide comments on:

Emerging Trends (in our area during this quarter):

-During Quarter 4, NewBridge developed a waitlist for Case Management services again, after having successfully eliminated it in Qtr 3. This was due in part to the loss of 3 Case Managers during the month of October 2019. Also, our focus turned towards Medicare Part D counseling starting Oct 15. NewBridge was able to successfully hire 3 new Case Managers and the focus during this last quarter, for them, was to learn NewBridge policies/procedures at the same time building their caseloads. At the end of Quarter 4, NewBridge has 11 full time Case Managers with full caseloads (approximately 65 clients each) and 2 full time Case Manager Supervisors.

-NewBridge received 101 new referrals for Case Management services in Qtr 4. NewBridge also received 110 HDM assessment referrals from SSM Health; this number includes both re-assessments and new assessments.

-During Qtr 4, NewBridge successfully provided Medicare Part D counseling to a total of 129 Seniors for Madison and Monona. This total includes 129 planfinders, and 70 seniors enrolled with CM assistance. The total amount of money saved is \$282,465.

-NewBridge launched a new program, Food Bridge, which offers monthly food pantry delivery for Case Management clients at nutritional risk throughout Madison and Monona. There have been a number of requests for this program as it gets started.

-Other trends that continue this quarter are home chore requests, specifically for snow removal assistance, housing assistance (including evictions, homelessness and relocation) and connection to or renewal of benefits.

late

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

Client issues that take up a significant amount of CM time include the following:

1. Homelessness/evictions. This is a continuing issue throughout Madison and Dane County where there is a lack of affordable housing/low income housing.
2. Mental Health/AODA: we continue to have a number of clients with significant mental health/AODA issues. As these issues affect other aspects of the client's life such as housing, safety, etc., CMs spend a lot of their time in connecting them to the appropriate MH service.
3. Home chore requests for clients who need both indoor and outdoor home chore assistance. There is a wait list for clients to be connected to home chore volunteers due to a low number of volunteers. CMs continue to complete the home chore assessments and add clients to the waiting list.
4. NewBridge CMs continue to work with clients who have complex issues (health/mental health/AODA) as well as focusing on diversity and poverty.
5. Bilingual CM: NewBridge has 2 full time Spanish bilingual case managers on staff providing services to over 33 clients (active cases) currently. Issues specific to some of these clients include immigration status, and/or lack of any income or benefits among the other issues of housing, transportation and benefits, etc, that other CM clients face.

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

4.00

Number of First Responders Dementia Forms completed

2.00

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2019 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:

608-798-6937x3 & casemanager@nwdss.org

Provide comments on:

Emerging Trends (in our area during this quarter):

Adults at Risk: Increase in self-neglect (including financial abuse) and hoarding client cases. Partnered with Adult Protective Services, Victims Unit and local law enforcement.

DME: Increase in requests for durable medical equipment loans.

Mobile Meals: 5 new participants

ESI & Food Share: saw an increase in participants seeking application assistance

Dementia: counseled 3 families regarding struggles with behavioral changes; partnered with Joy Schmid, ADRC, for coordinated home visits.

SHIP: saw an increase in dual eligible clients needing assistance (new to Medicare/Medicaid)

Medicare Part D AOE: 86 seniors helped, 84 plan finders conducted, 50 enrollments, 13 Senior Care applications completed or renewed.

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

APS - 3 cases of self-neglect (including financial abuse) and 2 cases of hoarding. Partnered with Adult Protective Services, Guardianship, Victims Unit, local law enforcement and Katie and New Bridge. This involved many hour of coordinated home visits, calls, emails as well as guardianship vs. POA-F vs. Rep Payee options counseling.

MTM - Medicaid Transportation Management - spent a minimum of 16 hours navigating the set up, cancelation and greivence complaints of MA cleint transportation needs. Often times the contracted transportation company will reject the ride at the last minute and not contact the client in a timely manner resulting in missed/canceled medical appointments for serious health conditions. Solution: trying to find members in the community to take participant(s) to medical rides and utilize MTM mileage reimbursement (which still require many hours of CM time to naviage & set up).

Alzheimer's & Dementia - counceled 3 families struggling with behavioral changes. This involved coordinated home visits with participant & families, calls and emails with Joy Schmidt and Mary Severson for AFCSP grant assistance.

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

60.00

Number of First Responders Dementia Forms completed

0.00

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2019 Quarterly Client-Centered Case Management Report

Agency Name:

Oregon Area Senior Center

Reporting Period:

Quarter 4 (October-Decemb

Reported by:

Noriko Stevenson and Carol Bausch

Phone & Email:

(603)835-5801&nstevenson@vil.oregon.wi.us&cbausch@vil.oregon.wi.us

Provide comments on:

Emerging Trends (In our area during this quarter):

The OASC Case Managers are seeing the increased number of older adults who are suffering from social isolation and loneliness. Often those who are no longer able to drive become socially isolated in our area. The OASC provides transportation to shopping and congregate meals, and activities; however, clients seem to have a difficult time transitioning to getting rides from others. The OASC case managers work to make this service as easy and accessible as possible.

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

The OASC Case Management office spent significant amount of time assisting clients with Medicare Part D open enrollment. Clients often did not feel comfortable or competent enough using a computer while the Medicare website required clients to have online accounts starting this year. Medicare Part D plan finder was not as user friendly as before.

Clients with persistent and severe mental health issues continue to require a significant amount of time. Overall, CMs spend extensive time on clients with PSM requiring investigating the facts and contacting medical staff, family members, and friends to prevent elder abuse and gross self-neglect.

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

14

Number of First Responders Dementia Forms completed

0

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2019 Quarterly Client-Centered Case Management Report

Agency Name:

Southwest Dane Senior Outreach

Reporting Period:

Quarter 4 (October-December)

Reported by:

Lynn Forshaug

Phone & Email:

608-437-6902 swdaneoutreach@mounthorebwi.info

Provide comments on:

Emerging Trends (in our area during this quarter):

Medicare D was a busy time at our Center, many seniors coming in to renew or check out new plans.

We had Seniors coming in for Energy Assistance appointments.

We were encouraging seniors to get their flu shots!

Emergency meals were sent out to all who received Home-delivered meals.

We were preparing seniors to be ready for winter with having their furnaces checked, having extra food and medicine on hand, etc.

late

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

The Medicare D appointments were very time consuming. Some seniors came back for a second appointment to finally decide on a plan.

Mary Kay is working with a senior who we had worked with earlier in the year, regarding her memory, finances, being independent, etc. This senior's grandson is her POA for Finances and this is making this lady very upset. He is not sharing anything about her finances, like how much money she has, what her bills (rent, health ins., phone bills, etc.) are costing. We have had someone from APS come out to visit her and look into her finances. They found no wrong doing. Her grandson says he does not want to be the guardian, but wasn't paying her bills for awhile, so her rent and health insurance had lapsed. This has now been resolved. We are trying to work with the grandson and ex-daughter-in-law for better communication.

Mary Kay continues to work with a man who needs help in paying his bills each month.

We visited a lady who had seven large dogs living in her home for the past 15 years. The house was filthy, husband was in the hospital with a severe illness and couldn't come home till it was cleaned up. She doesn't get around very well. Two sons are not on the same page with the situation and she doesn't want to spend her money for anything, since this is a second marriage for both. We did start meals since it her husband isn't there to help and who waiting on her daily. The house has now been cleaned fairly well by an agency. We are trying to line up a caregiver to help with sponge bathing. She also had a visit from someone at the ADRC for an evaluation.

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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2019 Quarterly Client-Centered Case Management Report

Agency Name:

Stoughton Area Senior Center

Reporting Period:

Quarter 4 (October-December)

Reported by:

Hollee Camacho

Phone & Email:

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

Provide comments on:

Emerging Trends (in our area during this quarter):

- Lack of agencies to do chore services
- Lack of therapists that accept Medicare
- Many clients struggling with AODA are refusing counseling or assistance from agencies
- Caregiver stress, and continued reluctance with many caregivers to accept outside assistance
- More old clients or unknown clients on partnership programs calling seeking funds or advocacy
- Poor communication with agency working with client
- Lack of services for payee/Care WI
- Continued struggle with clients attaining affordable housing
- Low-income burial vs. cremation
- Long waiting list for low-income housing.
- Medical illiteracy; without literacy it's very hard to negotiate basic life and health systems
- Erratic health, multiple ER and hospitalizations and does not call until there is a crisis,,
- Clients needing much more support than what they admit
- Isolation; clients with too few social contacts
- Landlords are allowed to force clients to sign new leases 4-5 months before their current one is ending; they put the new date on the new lease. Basically, clients have no chance to ever give notice this way. If they won't sign the new lease right away when asked, clients are told the landlord has people who want the apartment and he is going to start showing it.
- Continued MTM issues: Many missed rides or canceled rides for no reason!

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

- AODA
- Illiteracy
- Medical Illiteracy
- Difficulty communicating with client due to aphasia/stroke complications.
- APS/Gaurdianship/Partnership
- Dental issues with VA
- Finding affordable housing
- Energy assistance
- Untreated memory impairment and related scam concerns
- Stroke/Aphasia
- Lack of services through Care WI
- Hoarding, refusal to make changes necessary for health
- Multiple ER visits, resistive to care
- Caregiver stress

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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2019 Quarterly Client-Centered Case Management Report

Agency Name:

Sugar River Senior Center

Reporting Period:

Quarter 4 (October-December)

Reported by:

Angie Markhardt

Phone & Email:

608-424-6007, angie.srseniorcenter@outlook.com

Provide comments on:

Emerging Trends (in our area during this quarter):

-Caregiver respite and/or care receiver placement has been an ongoing trend this quarter. Clients who are burning out from the effort of caring for a spouse that has dementia especially. There are not areas that most feel are good options for respite care. The other concern that then compounds the issue is that any type of placement short of CNF is private pay and the funds to cover placement would destitute the caregiver then living alone. In one case we have contacted the ADRC(green county) to work through the choices available.

-Coverage for low income(bordering poverty) for dental work and hearing aids. Medicare non coverage and medicaid ineligibility place them in a void of care.

-Worked with large amount of seniors that had difficulty in making calls that involve making it through a variety of computerized choices before being able to talk with a human. This would also include however new tech set up that assumes a current tech in place. ie. cell phone activation that is part of an internet/cable provider package that assumes the new user has a current cell and/or email address.

Dementia care continues to be an issue that I work with daily.

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

- Rides in rural setting continue to be overwhelming for scheduling enough drivers
- Care for Caregivers has been using a great deal of time this quarter as well. Cost and location of respite and placement is concerning.
- Cost of living is not being covered by increases and more and more seniors are falling between the poverty level and the border of poverty. This is an area that we can find band-aids but no fix is for. Senior boxes and locations with free pantries are becoming more necessary for more seniors

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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2019 Quarterly Client-Centered Case Management Report

Agency Name:

Waunakee Senior Center

Reporting Period:

Quarter 4 (October-December)

Reported by:

Melissa Woznick & Candice Duffek

Phone & Email:

849-8547 mwoznick@waunakee.com

Provide comments on:

Emerging Trends (in our area during this quarter):

The most provided information/resources were ADRC, Family Care, Elder Law Attorneys/Free Legal Services, Energy Assistance, Lifeline, Caregiver resources, Home Care Agencies, Senior center lunches & programs and Transportation options (RSVP & TSI).

Our Senior Center had two Energy Assistance appointments at our location this past quarter. This is a program that we promote, assist our clients with scheduling appointments, help gather necessary documents for appointments, coordinate transportation as needed to get them to their appointments, and for some, go with them to their appointments.

Our Memory Cafe has picked up in participants and is a wonderful asset to have for the community. We hope this continues to be the trend for the Cafe.

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

This past quarter we were able to connect some of our clients in financial need, with some local resources. There was a lot of time involved coordinating these efforts. This included one low-income client receiving money towards paying a high medical bill, providing a client with a new vacuum cleaner and telephone, groceries and gifts were provided to a client who unexpectedly lost her daughter/caregiver in December, and providing gift cards for a few clients.

Another amazing service which took a lot of coordination between several non profits, a local auto repair shop and a senior. We were able to pull together \$400 to go towards a car repair and the senior was able to have transportation again before the holidays. It took several days to get it all complete but the senior was overjoyed. It was wonderful to work with so many people to help out this senior in need.

Majority of our time and focus this past quarter was assisting clients with Medicare Part D. It was more time consuming this past year, as CMS launched a redesigned Planfinder. We had to learn the new system, work through many kinks, explain and set up MyMedicare accounts for our clients, and update our procedures and forms.

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

	QTR 1	QTR 2	QTR 3	QTR 4	TOTAL
Colonial Club	4	9	9	6	28
DeForest	1	1	1	0	3
Fitchburg	2	3	1	0	6
McFarland	0	0	0	0	0
Middleton	0	0	0	0	0
NewBridge	3	0	6	4	13
NW Dane	45	55	45	60	205
Oregon	1	1	1	14	17
SW Dane	0	1	1	0	2
Stoughton	1	2	0	2	5
Sugar River	1	3	1	2	7
Waunakee	1	3	4	4	12
TOTAL	59	78	69	92	298

Waunakee: Tyranny of Robocalls in our September Newsletter – and we distribute 1,000 Newsletters

Number of First Responders Dementia Forms Completed

	QTR 1	QTR 2	QTR 3	QTR 4	TOTAL
Colonial Club	0	2	2	0	4
DeForest	0	0	1	0	1
Fitchburg	1	1	1	0	3
McFarland	0	2	0	0	2
Middleton	1	0	0	0	1
NewBridge	0	0	0	2	2
NW Dane	3	1	1	0	5
Oregon	0	2	4	0	6
SW Dane	0	0	0	0	0
Stoughton	4	1	0	0	5
Sugar River	0	0	0	0	0
Waunakee	0	3	3	0	6
TOTAL	9	12	12	2	35