



## ADRC Desk Reference

### EMS Fall Prevention Referral Process

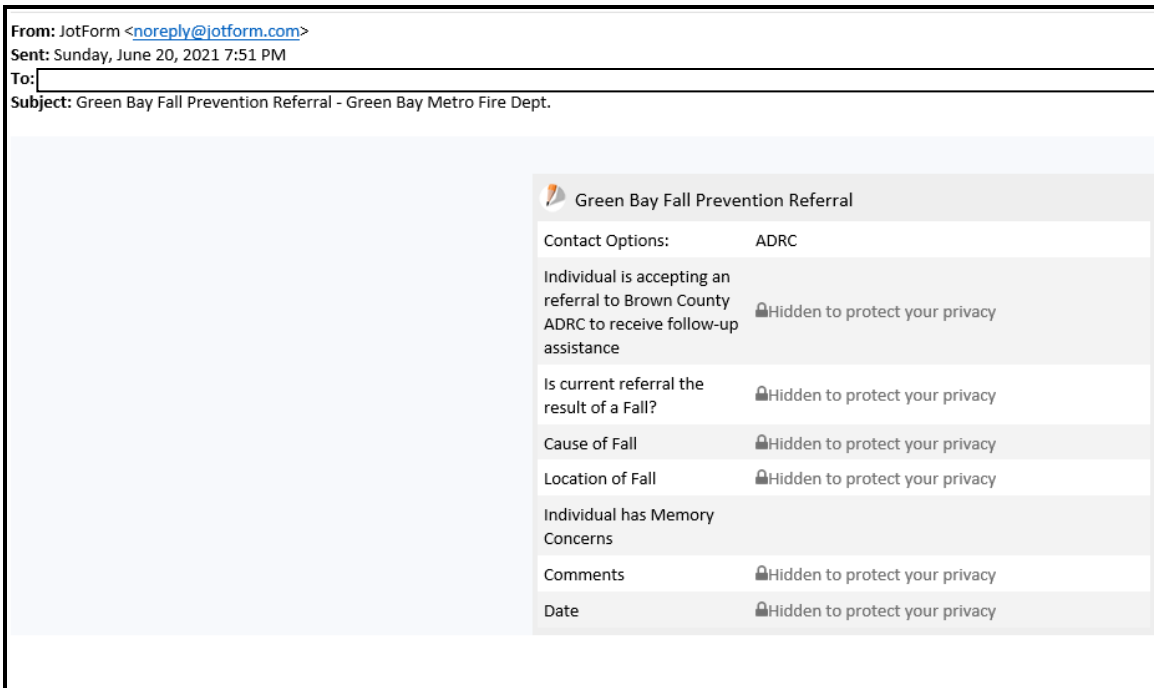
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**Project Background:** The Brown County Prevention Coalition, Northeast WI Regional Trauma Advisory Council (RTAC), and Northeast WI Falls Prevention Alliance are partnering on the tools and process to help EMS refer a falls pick-up patient (or simply at-risk patient) to local resources including ADRC, Building Inspector, and APS. The following process details the steps for ADRC follow-up on these EMS referrals.

#### **Referral Process to ADRC:**

- 1.) ADRC receives email notification (NAMESHERE) that a referral was made by an EMS Dept via Jotform. An example of how that looks is below.



- 2.) ADRC Staff (NAMES HERE) logs into secure Jotform site to print customer details of the referral and calls I&A intake line, or “yellow slip” if the line is busy, verifies if the customer is already being worked with or not and provides a printout of the referral to assigned staff and an email with the link to the initial customer letter to be mailed out
  - i. I&A Letter to Consumer
- 3.) ADRC Staff (NAMES HERE) sends back confirmation to the referring EMS Dept (NAMES EMAILS HERE) that referral has been received and assigned to staff.
- 4.) ADRC Staff (NAMES) updates EMS Falls referral tracking spreadsheet with:
  - a. Referral #
  - b. EMS Dept
  - c. Date of referral
  - d. I&A assigned (Initials)
  - e. First and last name (Customer)
  - f. Referral result of a fall
  - g. Cause of fall
  - h. Location of fall

- i. Memory concerns
- j. Know to ADRC

**I&A Desk Reference Process:**

- 1.)
- 2.) If referral includes both ADRC and APS, ADRC (I&A) coordinates with APS by calling intake line.
  - a. Review referral with APS to determine:
    - i. If APS is opening a case or not.
    - ii. Provide your name as I&A point person if APS should need to follow up.
  - b. Writer enters notes in SAMS/WELLSKY
- 3.) ADRC I&A assigned sends out a letter to customer explaining that they should expect a call within a week of receiving the letter. ADRC Staff (NAME- Primary, NAME- 1<sup>st</sup> backup, NAME- 2<sup>nd</sup> backup) will email I&A a fillable version of the letter.
  - a. Writer enters notes in SAMS/WELLSKY
  - b. Schedule a customer call within 5-10 business days from the date the letter was mailed to the customer.
- 4.) ADRC I&A assigned attempts 1st call:
  - a. If able to reach the customer, the writer offers:
    1. Phone conversation, no options counseling accepted by the customer (declined services)
    2. Phone conversation, options counseling accepted by the customer
      - a. Schedules a Home visit (HV) for options counseling within 1 month
      - b. Schedules an Office visit (OV) for options counseling within 1 month
      - c. Schedules a Virtual visit (VV) for options counseling within 1 month
  - b. Writer enters notes in SAMS/WELLSKY
  - c. If unable to reach, skip to #7
- 5.) ADRC I&A assigned reviews the following during scheduled visit:
  - a. Family/Care Iris
    - a. Exploring eligibility      2. Already on services (is case manager aware of fall?)
  - b. Record if referred to any of these fall prevention services:
    - Falls Prevention Programs:
 

1. Stepping On	2. Boost Your Balance
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    - Home Service Options
 

1. Nutrition (HBM)	2. DME	3. Environment (rugs)
4. Personal Response	5. Strength/Balance	6. People Power (home care)
    - Medical Provider Referral
 

1. Medication Review	2. Therapy (PT/OT)	3. Bio Metrics (lab tests)
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  - c. Writer enters notes in SAMS/WELLSKY
  - d. Writer schedules follow up (1<sup>st</sup>) within 1 month or notes declined follow-up/services
- 6.) ADRC I&A assigned has scheduled follow up (1st), record if any of the previous action items were completed from 4b.
  - a. If still in process of connecting/completing action item(s), schedule a follow up (2nd) within 1 month.
  - b. Writer enters notes in SAMS/WELLSKY
- 7.) ADRC I&A assigned has scheduled follow up (2nd), record if any of the previous action items were completed from 4b
  - a. Writer enters notes in SAMS/WELLSKY

- 8.) If ADRC I&A assigned does not reach the customer, they will schedule and attempt to call a 2nd time within 5 business days of 1st call attempt.
    - a. If unable to reach close out with outcome “unable to reach”
      - i. Writer enters notes in SAMS/WELLSKY
        - a. Date and Times of call attempts
    - b. If able to reach customer follow steps 3a and on.
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- 9.) ADRC I&A (NAMESHERE) updates EMS Falls Referral tracking spreadsheet each month with:
  - a. Call Results (using dropdowns)
    - i. Family Care/IRIS
    - ii. Fall Prevention Services
- 10.) ADRC provides 6month reporting to participating EMS depts on outcomes. Prevention Office Assistant runs semiannual report (as of end of June and as of end of December) and emails to participating EMS Depts on outcomes of referrals. This is emailed annually by July 10 and by Jan 10.

**Closing:**

If I&A assigned learns of any positive outcome for customer or has an input for suggested improvement to share about this process, please share with ADRC staff (NAMES HERE) as this will be used for continuous process improvement in meetings with EMS partners.

**Acronyms:**

- ADRC – Aging & Disability Resource Center
- APS – Adult Protective Services
- DME – durable medical equipment
- EMS – emergency medical services
- HBM – homebound meals
- I&A – information & assistance
- OT – occupational therapy
- PT – physical therapy