INFORMATION AND ASSISTANCE FOLLOW-UP POLICY

Effective Date: August 1, 2008
State Approved Date: August 29, 2008

Policy:
It is the policy of the ADRC of St. Croix County that Information and Assistance (I&A) contacts will be documented and tracked through BEACON. The documentation will assist in determining if follow-up contacts are needed. The AIRS Standards for Professional Information and Referral will be used as a foundation for providing follow-up contacts.

Procedure:
1. Follow-up contacts may be merited under several scenarios, such as:
   • An individual makes a request for follow-up contact or assistance.
   • The person making the inquiry may have multiple concerns which cannot be reasonably accomplished in one contact/visit.
   • The referral service is new or has been inconsistent in their responses in the past.
   • Basic needs have been requested (food, shelter, clothing) and the situation appears to be stretching the person to their capacity.
   • There are safety concerns.
   • Collateral contacts need to be made.
   • An application needs to be submitted by or on behalf of the individual.
   • There has been a history of problems with an organization to which the ADRC is making a referral.
   • A person appears unable to proceed with the information independently.
   • A person is unsure, upset or disappointed.

2. Follow-up contact will not be made when:
   • The conversation is brief and specific, as in a request for a phone number or a simple referral.
   • When the customer has clearly indicated that they do not wish to have follow-up or additional contact, unless there are significant safety concerns.

3. As with all ADRC services, respect, confidentiality and consideration are essential in providing quality follow-up contacts.

4. The need for a follow-up contact will be noted on the ADRC contact form. The date the follow-up needs to be made by will also be noted. Follow-up will usually occur within 30 days after contact. Follow-up contact will be documented in the client tracking database within one week of contact.
Approved by:

[Signature]
Fred Johnson, HHS Director

Brad Beckman, ADRC Manager

8/1/08
Date

8-1-08
Date

Revised: July 22, 2008