

From: Bruce Bronzan <bbronzan@nocnews.org>
To: Kester, Tonykester@aging.sc.gov
Date: 10/29/2015 12:08:25 PM
Subject: ADRC Referral and Reporting Now Made Easy

Dear Tony,

The award-winning [Network of Care for Seniors & People with Disabilities](#), piloted in California, has successfully been replicated in many parts of the country. The latest innovation of this locally customized Web portal is a highly advanced Referral Application.

The ADRC-compliant Referral Application enables case managers to develop Options Counseling for each consumer, stored as part of a record. It also offers the Network of Care's own categories as a search option and uses the site's public-facing database for immediate availability of updates and additions. Users will see a dashboard of all referral activities upon logging in, as well as their own follow-up reminders.

"The new Options Counseling feature has met all the requirements we asked for in making the Call Center more robust and able to easily move from Information & Referral to Options Counseling documentation," said Eden Mayne of the Boulder County, Colo., Area Agency on Aging.

The Network of Care Referral App also enables staff to:

- Track all contacts with consumers or clients.
- Prepare call notes, followup and care plans.
- Conduct assessments, such as activities of daily living; basic needs assessments, and/or nutritional-needs assessment online. Other assessment can be deployed upon client request.
- Search and identify resources with just a few clicks.
- Assign AIRS taxonomy codes to services using an internal application and instantly view these services in the Referral App.
- Customize intake forms.
- View history by client or caller.
- Report on all information and referral data by client, by agent, by agency, by taxonomy, and much more using our dynamic reporting tool.
- Store data for clients in their own, secure Personal Health Records.

This combination of the public-facing Network of Care Web site and its Referral Application delivers a state-of-the-art system for ADRCs at an extremely affordable price. The following online assessments are also available for those providing care management and the Balancing Incentives Program:

- **Basic Information** – The data collected on the Basic Information page provides a place to document an individual's demographic information.
- **Support Information** – The Support Information assessment records an individual's family and community support system.
- **Health** – Information documented in the Health assessment chronicles an individual's current

- health status, including: medications taken, recent hospitalizations and doctors' visits, and health problems diagnoses.
- **Assistive Devices** – The Assistive Devices assessment allows the care manager to note any assistive devices currently being used and to recommend new devices. The total number of devices needed will be used in the Frail Client report.
- **Cognitive** – The Cognitive assessment was developed by St. Louis University to determine an individual's memory and reasoning.
- **Mental Health** – Information documented in the Mental Health assessment reflects the individual's self-reported emotional health and whether they would consider a mental health evaluation by a professional.
- **Legal/Financial Information** – The Legal/Financial Information assessment introduces a discussion around legal needs, and helps evaluate if an individual could benefit from state, federal, or local assistance.
- **Nutrition** – The Nutrition assessment establishes an individual's current dietary habits and provides a risk assessment. The Nutrition Risk Assessment is required for the Frail Client report.
- **ADL** – The ADL assessment evaluates an individual's ability to complete activities of daily living related to basic tasks of everyday life.
- **IADL** – The IADL questionnaire reviews an individual's ability to perform activities related to independent living.
- **Housing** – The Housing assessment documents a client's current housing situation, and allows a care manager to document their observations about potential at-home risks. This information is required for the Frail Client report.

If you have any questions or would like a more in-depth demonstration of how the Network of Care for Seniors & People with Disabilities works, please contact me at Bruce@trilogyir.com or (415) 458-5900.

Thank You,

Bruce Bronzan, President

1101 Fifth Avenue, Suite 250

San Rafael, CA 94901

Office: (415) 458-5900

Cell: (415) 377-4194

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