

## Addendum

Committee on Finance and Budget  
Thursday, February 9, 2012 / 4:30 PM

Courthouse – Room 2532  
Eau Claire, WI 54703

1. Amendments to Care Transitions Program / Discussion - Action

Post: 2/6/2012

Copy: media, Committee members, Tom McCarty, Scott Rasmussen

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**EAU CLAIRE COUNTY**  
**NEW POSITION/AMENDED FTE REQUEST FORM**  
*BUDGET YEAR 2012*

Return this form to Human Resources no later than 5 p.m. on August 19, 2011.

Action Requested:  New Position       Increase/Decrease in FTE Status of Existing Position

Department:            ADRC

Position Title:        Care Transition Coach

Anticipated Start Date: 3/1/12

Current/Past  
Employee Name:        N/A

No. Years in Position:    N/A

## DISCUSSION AND JUSTIFICATION OF PROPOSED POSITION

**1. Reason for new position or amended FTE request:**

ADRC of Eau Claire County is implementing an evidence based Care Transitions program for Medicare beneficiaries who are at high risk for readmission to the hospital. This is a regional effort between Mayo Clinic Health Systems, Sacred Heart Hospital, St Joseph's Hospital and the ADRCs of Eau Claire and Chippewa Counties. We are in the processes of contracting with the ADRC of Chippewa County to provide the funding for this position and expansion of service to St Joseph's Hospital and Chippewa County.

**2. How does this position fit into the organizational structure of the Department?**

This position will work closely with the existing Care Transitions Coach and Prevention Program Coordinator positions and be supervised by the Options Counselor Supervisor.

An organizational chart has been obtained from Human Resources and is attached.  Yes     No

**3. FLSA Status:**  Non-Exempt     Exempt

**4. Hourly or Annual Wage/Pay Grade: \$21.72-\$23.41**

**5. What are the major functions of the proposed position?**

To provide Care Transition Intervention services to residents of Chippewa County. The Care Transition Coach ensures a safe and effective transfer of patients from hospital to home by serving as the bridge between the professional staff in a care setting and the patient and/or family, collaborating on areas such as medication self-management, use of a patient centered record, primary care and specialist follow-up and monitoring of condition.

**6. Does this position already have a position classification (PEB or DBM rating, or similar job title) and job description? (If yes, please attach appropriate documentation.)**  Yes     No

If no, has a *Position Analysis Questionnaire* been completed?  Yes     No

**7. Is the position mandated?**             Yes     No Expanding this program to Chippewa County is voluntary, but important as it coordinates services between area hospitals and takes advantage of efficiencies through shared processes and supervision.

If yes, provide statute, regulation, etc.

**8. Position Justification Description (Why is the position needed?):**

The position is needed in order to expand the Care Transition program at the ADRC of Eau Claire County to Chippewa County. By implementing this evidence based program, our goal is to increase the quality of life of individuals on Medicare, promote self-management, reduce hospital readmission rates, and save Medicare

funds.

**9. Measurement of Job Performance (i.e. clients, caseload, work output, etc.)**

This positions caseload will be approximately 20-25 per month/180-225 total for the March through December 2012 time period.

**10. Are there opportunities to consolidate, eliminate, and/or outsource the job responsibilities?**

Yes  No

**Please explain:** Position requires specific training and supervision is only offered through the ADRC of Eau Claire County at this time.

11. Is this a new position?  Yes  No

If yes, would its creation cause the future elimination of another position?  Yes  No

Please explain: This position will be fully funded through a contract with the ADRC of Chippewa County and will provide services in Chippewa County.

12. Is this work currently being performed by someone else?  Yes  No

If yes, by whom?

13. For new positions, are there alternatives to the services that this individual would provide (temporary help, part-time vs. full-time, help from other County departments, use of overtime, eliminating unnecessary work, etc.)?

Yes  No Please explain: N/A this is a new evidence based program and requires specific training.

14. In the first 12 months from the new position start date, do you intend to work this position 600 or more hours? (Note: If the answer is yes, the position immediately qualifies for Wisconsin Retirement)

Yes  No

15. How will this position affect other employees in the department? (e.g. supervision, subordinates, etc.)

This position will be supervised by the Options Counselor Supervisor and work closely with the existing Care Transitions Coach and Prevention Program Coordinator positions.

16. What are the consequences of not taking this personnel action?

We have been working with Mayo Clinic Health Systems, Sacred Heart Hospital, St Joseph's Hospital, and the ADRC of Chippewa County since June 2011 to implement a Care Transitions program first in Eau Claire County and second in Chippewa County. The timing of this position being hired within the first quarter of 2012 is crucial for successful expansion and regional coordination of this evidence based program.

17. Has this position been reviewed to determine if it can be combined with or covered by another existing position whether inter- or intra-departmental?  Yes  No

18. What is the impact of not filling the position in:

3 months:	All efforts to coordinate the implementation of the Care Transitions program in Eau Claire and Chippewa Counties will be lost resulting in loss of funding and duplicated efforts of staff at a later date.
6 months:	If permission for this hire is delayed more than 3 months, this request will be withdrawn for 2012.
12 months:	Unknown if permission to use available funding would be renewed if project is delayed.
Not at all:	No expansion of program to Chippewa County. Lack of coordination between hospitals that serve both Chippewa and Eau Claire Counties.

19. Can the position costs be offset by eliminating or reducing a lower priority function?

Yes  No

Please explain. N/A funding is specific to this program.

20. For new positions, is there a workspace available for this position?  Yes  No

If yes, where? ADRC of Chippewa County, St. Joseph's Hospital, Mayo Clinic Health Systems, and Sacred Heart Hospital

If no, what needs to be done to accommodate the requested position?

**21. How does this position fit into the long-range and strategic plans of the Department and/or County?**

ADRC's Mission Statement is: "To help people age 60+ and adults with disabilities secure needed services or benefits, live with dignity and security, and achieve maximum independence and quality of life."

This position enables the ADRC of Eau Claire County to intervene at the point when high risk individuals are discharged from the hospital, provide coaching to promote self-management, and save Medicare funds by reducing hospital readmissions.

**22. Is established salary appropriate for job responsibilities?**  Yes  No

**NOTE:** Attach an accurate and up-to-date job description. Positions will not be considered absent job descriptions.

# TOTAL FISCAL IMPACT/FUNDING SOURCES

Attach Additional Sheets as Necessary

## 2012 FISCAL IMPACT

### WAGES:

Current Pay Grade: 153 Step: C

$$\begin{array}{rcccccc}
 \$25.75 & & \times & 130 & & \times & 9 & & = & \$30,128 \\
 \text{Rate per hour} & & & \text{Hours per month} & & & \text{Months per year} & & & \text{Gross Pay}
 \end{array}$$

### BENEFITS:

$$\begin{array}{rcccccc}
 \$30,128 & & + & \$4,083 & & + & \$120 & & + & \$9,200 & & = & \$43,531 \\
 \text{Gross Pay} & & & \text{Fringe Benefits*} & & & \text{Insurance**} & & & \text{Other ***} & & & \text{Total Fiscal Impact}
 \end{array}$$

#### \*\* INSURANCE (ANNUAL)

UNIT:	FICA	WRS Employer	Health Insurance (Family Plan)	Dental Insurance	Life Insurance
Non-Represented:	7.65%	5.8%	\$24,735.60	\$0	\$120
Teamsters:	7.65%	5.8%	\$24,735.60	\$994.68	\$120
AFSCME:	7.65%	5.8%	\$24,735.60	\$0	\$120
Elected Official:	7.65%	6.0665%	\$24,735.60	\$0	\$120
WPPA Non-Supervisory:	7.65%	15.5%	\$24,735.60	\$1,104.96	\$120
WPPA Supervisory:	7.65%	15.5%	\$24,735.60	\$1,104.96	\$120
WPPA Civilian:	7.65%	5.8%	\$24,735.60	\$1,104.96	\$120

Finance Department 2012 Salary and Benefit Estimate: (Double click in table to activate) (Reference chart above for WRS Employer rate. You must type in Cell D3 the appropriate employee classification rate for proper form calculation.)

Name	Salary	FICA	WRS Employer	Health Insurance	Life Insurance	Total
		7.65%	5.90%	10% Increase		
Care Trans. Coach	\$ 30,128	\$ 2,305	\$ 1,778		\$ 120	\$ 34,331
		\$ -	\$ -			\$ -
		\$ -	\$ -			\$ -
		\$ -	\$ -			\$ -
Department Totals	\$ 30,128	\$ 2,305	\$ 1,778	\$ -	\$ 120	\$ 34,331

The rate per hour includes \$2.10 in lieu of fringe benefits.

Position costs were calculated at level C (step 3) rate assuming it may be filled by an employee transfer.

\*\*\* "Other" includes, but is not limited to: equipment, office space, vehicle, on-call pay, etc. Please define and break down "other" costs here:

OTHER CATEGORIES	BUDGET YEAR 2012
Personal Equipment (e.g. tools, uniforms, safety equipment)	
Mileage & Meals	\$1,800
Training Expenses (Including memberships)	\$4,000
Computer Equipment (e.g. hardware, software, wiring, etc.)	\$2,200
Office Furniture and Supplies	\$0
Other Operating Expenditures	\$1,200 phone
Renovation/Relocation Costs	\$0
<b>TOTAL: \$9,200</b>	

## 2012 FUNDING SOURCES

<input checked="" type="checkbox"/> Federal/State (Specify)	State ADRC grant funds through a contract with the ADRC of Chippewa County	100%	\$43,531
<input type="checkbox"/> County Tax Levy	\$	%	\$
<input type="checkbox"/> County Other (Specify)	\$	%	\$
<input type="checkbox"/> Grant (Specify)	\$	%	\$
<input type="checkbox"/> Grant (Specify)	\$	%	\$
<input type="checkbox"/> Grant (Specify)	\$	%	\$
<input type="checkbox"/> Grant (Specify)	\$	%	\$
<input type="checkbox"/> Grant (Specify)	\$	%	\$
<b>TOTAL</b>		<b>100%</b>	<b>\$43,531</b> *

\*Must match above total fiscal impact for 2011

Will any of the listed funding sources expire during the duration of the position?  Yes  No  
 If yes, please indicate what sources will expire, with expiration dates:

State ADRC grant funds are currently authorized for use in 2012. If the same funding source is available in 2013, we will continue to contract with Chippewa County.

This position will complete 100% Time Reporting and our department will receive Medicaid Match funds for allowable activities.

In addition, we are considering applying for Administration on Aging and/or Centers for Medicare and Medicaid Services grant dollars to continue this program beyond 2012.

If yes, please indicate where the funding will come from after the sources of funding have expired:

This request was reviewed and recommended by the governing committee on 1/18/12.

**Department Head Recommendation:**  Approve  Do Not Approve

Comments:

Department Head Signature: Deborah Mow

Date: 2/1/12

**County Administrator Recommendation:**  Approve  Do Not Approve

Comments:

County Administrator Signature: \_\_\_\_\_

Date: \_\_\_\_\_

**Human Resources Director Recommendation:**  Approve  Do Not Approve

Comments:

Human Resources Director Signature: \_\_\_\_\_

Date: \_\_\_\_\_

**Finance Director Recommendation:**  Approve  Do Not Approve

Comments:

Finance Director Signature: \_\_\_\_\_

Date: \_\_\_\_\_

## EAU CLAIRE COUNTY JOB DESCRIPTION

<b>TITLE:</b>	Care Transition Coach	<b>POS. NUMBER:</b>	
<b>DEPARTMENT:</b>	Aging & Disability Resource Center	<b>PAY GRADE:</b>	153
<b>REPORTS TO:</b>	Options Counselor Supervisor	<b>CLASSIFICATION:</b>	N/A
<b>FLSA STATUS:</b>	Exempt	<b>EEO CATEGORY:</b>	Professional
<b>UNIT:</b>	AFSCME: Courthouse Professional	<b>EFFECTIVE DATE:</b>	January 2012

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### **POSITION SUMMARY:**

The Care Transition Coach is key to ensuring safe and effective transfers in the movement of patients across the care continuum (i.e. hospital to home). Serves as the bridge between the professional staff in a care setting and the patient and/or family, collaborating on areas such as medication self-management, use of a patient centered record, primary care and specialist follow-up and monitoring of condition.

### **ESSENTIAL FUNCTIONS** (Illustrative only):

- Provides information and assistance with accessing public and private services, programs, and resources
  - Assists with application process for programs and referrals to both internal department and outside agency resources and services to meet their needs
  - Follows-up as needed to determine outcomes and to offer additional assistance as necessary
  - Provides information about and referral to emergency, mental health and substance abuse, Elder/Adult-at-Risk, and Adult Protective Services
- Provides Care Transition Coaching following the evidence based Care Transition Intervention program
  - Encourages patients and families to assume a more active role in patient care
  - Provides education and skill transfer coaching to assist patients with enhancing their communication and problem solving skills to address issues that may arise during a care transition
  - Provides information and guidance to patients and families to enhance the patient-practitioner communication
- Communicates with general public concerning issues for people served by the ADRC and their family and caregivers
  - Provides information and outreach on the importance of successful care transitions and the Care Transition Intervention program
  - Provides information on long-term care options, resources and services available, and criteria for eligibility for various services
  - Educates public on topics of interest to people served by the ADRC, such as housing, in-home services, employment, health promotion and disease prevention, etc.
  - Markets program and agency to community partners, potential clients of the ADRC, and the general population through public speaking and outreach initiatives; arranges for and makes presentations to support groups
  - Develops creative ways to serve individuals who, because of isolation, frailty, language barriers, reclusiveness, or other reasons, are unable to avail themselves of services
  - Maintains, gathers, and updates information regarding resources available
- Links at-risk individuals with prevention and early intervention services provided by the ADRC, public health, and other service providers
- Completes required documentation in accordance with established policies and procedures
  - Maintains outreach documentation and statistics
  - Completes 100% time reporting documentation for federal Medicaid Administrative Match activities
  - Completes all necessary documentation required for the Care Transition Intervention program
- Participates in agency committees and community focus groups, as well as internal focus groups
- Performs other duties as required or assigned

**WORK ENVIRONMENT:**

- Sedentary with occasional walking and standing in a general office setting
- Duties involve dealing with a variety of persons, some with physically and/or emotionally stressful situations
- Provides services in the office, at clients' homes, or in the community, which requires travel to different locations for performance of work duties
- Travel throughout Eau Claire County is required

**KNOWLEDGE, SKILLS, AND ABILITIES:**

- Knowledge of the needs of older people, adults with physical or developmental disabilities, adults with mental health and substance use disorders and their families and caregivers
- Knowledge of available benefit programs and resources for older people, adults with physical or developmental disabilities, and adults with mental health and substance use disorders and their families and caregivers
- Ability to communicate using skill transfer, coaching and motivational interviewing
- Skill and ability to independently organize time and records
- Ability to advocate and problem-solve for older people, adults with physical or developmental disabilities, and adults with mental health and substance use disorders and their families and caregivers
- Ability and skill to communicate effectively, both orally and in writing with a variety of people, including public speaking, interviewing, counseling, investigating, and fact finding
- Ability to establish and maintain effective working relationships with other employees and the public, with skill in relating to all people
- Ability to demonstrate patient-centered focus
- Ability to empower patients through skill transfer
- Ability to plan, organize and coordinate a variety of work projects
- Ability to perform detailed work accurately and within time limits
- Ability to work independently with minimal supervision, establishing priorities and meeting deadlines
- Ability to work in a fast paced environment
- Ability to perform mathematical computations to determine eligibility for programs
- Ability to work as an effective and collaborative team player
- Ability to maintain confidentiality of files and information
- Ability to operate a variety of office equipment, including, but not limited to, personal computer and printer
- Ability to work the allocated hours of the position

**REQUIRED QUALIFICATIONS:**

- Bachelor's degree from an accredited college or university with a major in social work, sociology, human services-related field, education, occupational therapy, vocational rehabilitation or other closely related field or a Registered Nurse in Wisconsin, pursuant to Wis. Stats. §441.06
- Two (2) years of paid, full-time experience working directly with people who are age sixty and older, individuals who are physically or developmentally disabled, or individuals with mental health or substance use disorders
- Participation in and training on case-handling procedures, office/program procedures, and public benefits
- Experience or training in computer use with Microsoft Office software

**LICENSES, CERTIFICATES, AND OTHER REQUIREMENTS:**

- Appointment will be conditional upon successful completion of criminal and caregiver background checks
- Must be certified as a Care Transition Coach within two (2) months of hire and maintain certification thereafter as a condition of employment
- Must possess and maintain a valid Wisconsin driver's license, acceptable driving record, and have access to private transportation for work-related duties

**DESIRED QUALIFICATIONS:**

- Experience providing coaching, skill transfer and self-empowerment work
- Experience working with the medical community
- Experience working with other professionals and resources serving the aging population
- Experience working with a resource database such as SAMS

**APPROVALS:**

\_\_\_\_\_  
Supervisor

\_\_\_\_\_  
Date

\_\_\_\_\_  
Department Head

\_\_\_\_\_  
Date

\_\_\_\_\_  
Human Resources Director

\_\_\_\_\_  
Date

**EMPLOYEE REVIEW:**

I have read the above, and understand that it is intended to describe the general content of and requirements for performing this job. It is not an exhaustive statement of duties, responsibilities or requirements. I have been given a copy of this description.

\_\_\_\_\_  
Incumbent's Signature

\_\_\_\_\_  
Date

# **ADRC OF EAU CLAIRE COUNTY PROVISION OF TECHNICAL ASSISTANCE AGREEMENT**

**I. PARTIES**

This Agreement is between Eau Claire County Aging and Disability Resource Center, (“ADRC of Eau Claire County”) located at 721 Oxford Avenue, Eau Claire, Wisconsin 54703, and Chippewa County Aging and Disability Resource Center, (“ADRC of Chippewa County”) located at 711 North Bridge Street, Room 118, Chippewa Falls, Wisconsin 54729.

**II. TERM OF CONTRACT**

Services under this Agreement shall commence March 1, 2012 and shall continue through December 31, 2012.

**III. PURPOSE OF CONTRACT**

The purpose of this contract is to provide Care Transition Intervention services to Chippewa County residents.

**IV. GOALS**

- A. Reduce the readmission rates to hospitals in Eau Claire County and Chippewa County.
- B. Create more effective coordination and delivery of ADRC services by Eau Claire County and Chippewa County service providers, specifically the hospitals with a physical presence in both Eau Claire County and Chippewa County that regularly serve residents of both counties.
- C. Coordination of outreach efforts to medical community as it relates to evidenced based prevention programs.

**V. SCOPE OF SERVICES**

- A. ADRC of Eau Claire County will perform the following services:
  - 1. Provide the Care Transition Intervention program services to residents of Chippewa County.
  - 2. Provide hiring and supervision for the Care Transition Coach position.
  - 3. Facilitate training for the Care Transition Coach position.
  - 4. Coordinate expansion of the Care Transition Intervention program with medical facilities located in Chippewa County, including but not limited to: St. Joseph’s Hospital and Mayo Clinic Health System- Bloomer.
  - 5. Provide ongoing updates related to the Care Transition Intervention program, i.e. participation, success rates, etc.
- B. ADRC of Chippewa County will:
  - 1. Pay Eau Claire County a lump sum of \$46,965.00 for services received from the .75 FTE Care Transition Coach position, including all training, travel, laptop, and telephone related expenses.
  - 2. Provide work space, when necessary, for the .75 Care Transition Coach position.
  - 3. Make marketing materials for the Care Transition Intervention and other prevention programs available in the resource center.

- VI. NON-APPROPRIATION OF FUNDS**  
ADRC of Chippewa County reserves the right to terminate this Agreement in whole or in part without penalty due to non-appropriation of necessary funds by the County Board, the State of Wisconsin, or the Federal Government.
- VII. TERMINATION**  
This Agreement may be terminated by either party on sixty (60) days written notice for any reason whatsoever.
- VIII. NOTICES**  
Notices required or deemed advisable under this Agreement shall be placed in writing and delivered personally or by registered or certified mail upon ADRC of Eau Claire County to: Jennifer Owen, Options Counselor Supervisor, Eau Claire County Aging and Disability Resource Center, 721 Oxford Avenue, Eau Claire, WI 54703, (715)839-5199; and upon ADRC of Chippewa County to: Susan Hebert Flanagan, Director, 711 N. Bridge Street, Chippewa Falls, WI 54729, (715)726-7779).
- X. NON-DISCRIMINATION**  
No otherwise qualified person shall be excluded from employment, be denied the benefits of employment or otherwise be subject to discrimination in employment in any manner or term of employment on the basis of age, race, creed, color, sex, national origin, or ancestry, disability as defined in Section 504 and the Americans with Disabilities Act (ADA), arrest or conviction record (consistent with s. 111.32 s. HSS 83.12(3), and s. HSS 83.13(6), sexual orientation, political affiliation, marital status, or military participation. All employees are expected to support goals and programmatic activities relating to non-discrimination in employment.
- XI. MUTUAL INDEMNIFICATION**  
The parties agree fully to indemnify and hold one another harmless from and against all claims, actions, judgments, costs, and expenses, arising out of damages or injuries to third persons or their property, caused by the fault or negligence of the said party, its agents, or employees, in the performance of this Agreement. The parties shall give to each other prompt and reasonable notice of any such claims or actions and the other party shall have the right to investigate, compromise, and defend the same.
- XII. WAIVER OF BREACHES**  
No waiver of any breaches of this Agreement shall be held to be a waiver of any other or any subsequent breaches. All remedies afforded in this Agreement shall be considered to be cumulative and in addition to any other remedies provided by law.
- XIII. SEVERABILITY**  
Should any article or any part of any article of this Agreement be rendered void, invalid, or unenforceable by a court of law, for any reason, such a determination shall not render void, invalid, or unenforceable any other article or any part of any article in this Agreement
- XIV. JURISDICTION AND VENUE**  
The laws of the State of Wisconsin shall govern this Contract and executed amendments thereto. Venue for all legal proceedings arising out of this Contract, or breach thereof, shall be in Eau Claire County Circuit Court, Eau Claire, Wisconsin.
- XV. SECTION HEADINGS**  
The headings of the several sections, and any table of contents appended hereto, shall be solely for convenience of reference and shall not affect the meaning, construction or effect hereof.

**XVII. CONFIDENTIALITY OF MEDICAL AND PATIENT RECORDS**

ADRC of Eau Claire County and ADRC of Chippewa County mutually agree to protect and maintain the confidentiality of all medical and patient records developed in the course of fulfillment of these contractual obligations.

**XIX. NON-ASSIGNMENT OF AGREEMENT**

The parties agree that there shall be no assignment of transfer of this Agreement, nor of any interests, rights or responsibilities herein contained, except as agreed to in writing.

**XX. MODIFICATIONS TO AGREEMENT**

There shall be no modifications to this Agreement, except in writing, signed by both parties.

**XXI. INTEGRATION OF AGREEMENT**

The entire agreement of the parties is contained herein, and this Agreement supersedes all previous agreements, whether written or oral and all negotiations as well as any previous agreements presently in effect between the Provider and the County relating to the subject matter.

Both parties hereto having read and understood the entirety of this Agreement consisting of three (3) typewritten pages hereby affix their duly authorized signatures.

**ARDC OF EAU CLAIRE COUNTY BY:**

\_\_\_\_\_  
DOROTHY MOEN  
DIRECTOR

\_\_\_\_\_  
(Date)

**ADRC OF CHIPPEWA COUNTY BY:**

\_\_\_\_\_  
FRANK PASCARELLA  
COUNTY ADMINISTRATOR

\_\_\_\_\_  
(Date)

CNTX-257