

The State of Wisconsin Board on Aging and Long Term Care



A Voice for Long Term Care Consumers

Serving Persons Aged 60 and Older

Guidance for Monitoring the Toll-Free Helpline and Online Complaint Process

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Toll-Free Line and BOALTC Website Intake Procedure

The toll-free phone line and website are often the first introduction of consumers to the Board on Aging and Long Term Care. Consumers have an expectation that the process by which they share their concerns toward resolution will be efficient, effective, reliable and confidential.

Published business hours for the Board on Aging are 8:00 am – 4:30 pm, Monday – Friday.

Every effort is made to answer calls “live” as much as possible as opposed to allowing calls to go into voicemail to be managed at a later time. During times of staff breaks or work on projects that cannot be interrupted, retrieving calls left on voicemail should be a priority as soon as time permits. Checking for messages on both the BOALTC toll-free line and website should be the first and last duties of the day for the Advocacy Specialist or designee.

Accessing the Toll-Free Line

From outside Central Office:

Dial: 1-800-853-3943

When prompted, press *608-246-7012# {10-digit ID}

When prompted, press 33 454545 33# {PIN}

Listen to message, pressing 1 to repeat, 2 to save, 5 to forward or 3 to delete. Press # to skip to end of message.

From Central Office:

Dial: 8-261-7000

When prompted, press dial *608-246-7012

When prompted, press 33 454545 33#

Proceed as above

Snapshot for Call Transfers

Dial 1-800-853-3943 (Outside Central Office))

OR

Dial 8-261-7000 (Inside Central Office)

Press *608-246-7012#

Press 33 454545 33#

Listen to message

Press 1 to repeat

Press # to skip to end

Press 2 to save

Press 5 to forward

Press 3 to delete

At end of message press 5 to forward

Transfer message: This call came in at xx:xx am/pm

Press 10-digit number of staff receiving transferred call

Press # to attach message, # to transfer, 3 to delete or 2 to save

Forwarding Messages

Listen to message or press # to skip to end of message. While listening to the message, take note of the name of the facility, city, zip code or other information necessary to triage the call to the appropriate ombudsman or other BOALTC staff. Locate the phone number to which the call will be transferred on the *Program List {Attachment 1}*.

Press 5 to forward

When prompted record transfer message, indicating the time the call came in to the 800 line. It is not necessary to provide a synopsis of the call. If including more than one staff in the transfer, indicate names of all persons to whom call is being transferred. Press # after recording.

When prompted, press 10-digit number of staff to whom message is being forwarded. *{Hint: 10-digit numbers are required for all transfers, even if located within Central Office}*

Press # to add message, and then # again to transfer. If more than one staff are to receive the call, press 91 to add additional 10-digit numbers.

Press 1 to return to message to listen again, press 3 to delete or 2 to save message for later reference if, for example, not enough information has been provided to triage (see below).

Messages Not Containing Enough Information to Triage

Some callers leave only a name and phone number for a return call, not enough information, generally, to know to which ombudsman the call should be transferred. Also, some persons who are calling on behalf of the resident or Family Care member will leave the caller's zip code in Milwaukee County, not the resident's or member's. Calls are transferred on the basis of where the resident or Family Care member resides. In these cases, please take the following steps:

Promptly return a call to the caller, informing her or him that more information is required in order to transfer the message to the appropriate ombudsman.

Ask for whatever information may be needed to transfer the call: ask if concern is regarding a licensed facility or the Family Care program; obtain name of facility; verify age of resident or potential client. It may be helpful to get a brief description of the concern so the ombudsman has a sense of the urgency of the matter.

If Family Care client is in Milwaukee County, ask for the zip code of the client. If the resident is in an assisted living residence in Milwaukee County, ask for the zip code of the resident.

Inform caller of name of ombudsman that will be returning call, but do not promise a date of call, as ombudsmen return calls based on priority and may not be immediately available.

Hint: It is not necessary to engage caller in the details of her or his concern; this will be covered at length by the ombudsman. For persons who seem to want to engage in this fuller discussion, offer an apology and an assurance that the ombudsman is the best person to hear their concern.

Return to the toll-free voicemail system and transfer the call to the appropriate ombudsman or BOALTC staff with needed information in transfer message.

When Staff are Out of Their Offices

The majority of an ombudsman's work occurs outside of her or his office, and schedules can change from IN to OUT status depending on calls received that necessitate re-prioritizing the work day. Even if ombudsmen are in their offices on a given day, current workloads may prevent them from returning calls the same day or within a prescribed timeframe, though every effort is made to return calls within 3 business days. For these reasons it is important that a timeframe for returning calls is not promised to a caller or complainant.

Follow the guidance in the following sections for calls that appear to be of an emergent nature (remembering that the BOALTC is not an emergency-response agency).

Ombudsmen make every effort to check e-mail and voicemail messages at least daily, but there may be instances when an ombudsman is out of her or his office for 2-3 days at a time, and without access to messages.

If a call appears to require an ombudsman's attention that same day or before the ombudsman is scheduled to be IN, please utilize the following options:

Check the schedule and send a broadcast e-mail to ombudsmen in the geographic area, if in Milwaukee, or to all ombudsmen who may be IN. Ask if someone may be able to return a call to a caller with a concern about, for example, an involuntary discharge notice, restricted visits or other rights issue. Request that persons "Reply to All" in order to know who is handling the call.

When an ombudsman has responded that they are able to return the call, either transfer the call directly, forward the unified e-mail message, or send the needed information in an e-mail message.

If no ombudsmen respond within a reasonable timeframe, alert the supervisor for further instructions.

Messages with Seemingly Urgent Content

Callers may leave a message **alleging abuse** in a licensed setting or of a person in the community. While the BOALTC is not an emergency response agency and BOALTC staff are not the investigators of these allegations, BOALTC staff are often the first to receive the complaint, therefore it is important that these calls are handled as priorities. Volunteer Ombudsmen are also directed to call the toll-free line with any information shared by a resident that alleges abuse.

Before transferring the call to the appropriate ombudsman, check the schedule to ascertain whether the ombudsman is IN or OUT or on vacation.

If the ombudsman is IN, transfer the call as per usual, also sending an e-mailed message that an urgent call is waiting on the ombudsman's voicemail.

If the ombudsman is OUT and the allegation involves a licensed facility, call the caller back and provide the contact information for DQA {Attachment 3} and encourage her or him to call immediately, assuring the caller that the ombudsman will also make contact with the caller as soon as they are back in the office. If the caller is a Family Care member, provide the contact information for the Member Care Quality Specialist (MCQS) assigned to the Managed Care Organization (MCO). {Attachment 4}

If the caller is a Volunteer Ombudsman and the regional ombudsman is OUT, call the Volunteer back and assure her or him that the message will be given to both the Ombudsman Services Supervisor and to the Volunteer Ombudsman Coordinator. Do not direct the Volunteer Ombudsman to contact DQA. Inform the Ombudsman Services Supervisor and the Volunteer Ombudsman Coordinator of the call, also providing the name of the Volunteer and the nursing home, if known.

If the caller is not a resident of a licensed facility or member of the Family Care program, but lives in the community, encourage the caller to contact her or his local law enforcement and/or Adult Protective Services (APS) unit {Attachment 5}, providing contact information as available.

Other urgent issues concern threats of **involuntary discharge** from a nursing home or assisted living residence. These are also priority issues for ombudsmen, and persons may also have appeal rights through the DQA that need to be acted upon within specified timeframes. Please follow the instructions above for these calls. If it appears as though the ombudsman will not be available for two days or more, please send a broadcast e-mail asking for any available ombudsman that could respond to the call.

Messages from Callers who Wish to Remain Anonymous

Messages are frequently left by persons who indicate they wish to remain anonymous, and often describe scenarios alleging abuse and neglect, and may or may not contain enough information to triage for follow up.

When callers state they wish to remain anonymous, describe a situation and provide the name of a facility, transfer the call to the appropriate ombudsman.

When callers state they wish to remain anonymous, describe a situation but do not leave the name of a facility or enough information to triage, promptly return a call to the caller, assure them of their anonymous status, and ask for the name of the facility. If the caller is not willing to divulge the facility name, inform them that an investigation into the concern is not possible without this information, and ask what their expectation may have been when making the original call.

If the caller persists in refusing to give specific information, ask if she or he would be willing to speak with the Ombudsman Services Supervisor, and provide the caller with the necessary contact information. Also send an e-mail or transfer the original call to the supervisor to inform her or him of a possible incoming call of a potentially emergent nature.

Transfer the call to the ombudsman for follow up once the name of the facility is known. Also, offer the contact information for DQA to the caller. If the caller continues to refuse to provide identifying information and refuses to speak with the supervisor, ask the caller to call again if and when she or he feels willing and able to share this essential information for investigation.

Note: Even though the voicemail system may record the number from which the caller dialed, if a caller wishes to remain anonymous and does not supply a call-back number please do not place a return call using the number as it appeared on the message.

Messages from Callers Not Served by the BOALTC

Some callers may be <60, or may have concerns about issues outside of the scope of authority of the BOALTC, such as complaints about independent or HUD-subsidized housing, a local food pantry or homeless shelter. Some callers may be >60, but are not residents of a licensed facility or receiving services via the Family Care or Community Options programs, therefore are also not served by the BOALTC. In these cases, please take the following steps:

Promptly return a call to the caller, informing her or him that more information is required.

Ask: is there a concern about a person living in a licensed facility or the Family Care Program, and is the person in question 60 years or older.

If the answer is no, using a sensitive tone, inform the caller that BOALTC staff do not have authority to serve the individual, but offer an appropriate referral, i.e., Disability Rights WI (DRW), the county Aging & Disability Resource Center (ADRC), Division of Quality Assurance (DQA) if the complaint is about a hospital program {reference Referral Directory, Attachment 2}.

Callers not yet 60 but living in a licensed facility may not be served by the BOALTC, but may have care concerns that other residents may also have, so these messages should be shared with the appropriate ombudsman, and contact information for DQA provided to the caller. These persons will not receive a return call from the ombudsman in most cases.

Messages from Facility Staff with Labor Disputes

Occasionally, callers who are facility staff will call the toll-free line with a complaint that they are not being treated fairly as staff, that they have been denied raises, or that they have been disciplined or terminated without cause.

Please return a call to the caller and inform her or him that the complaint does not fall within the scope of service for the BOALTC. Depending on the nature of the concern it may be appropriate to refer the caller to their facility Human Resources professional, their local Wage & Hour division or similar agency.

For Callers Requesting Translation Services

To serve callers who require an interpreter for language translation, the Board on Aging and Long Term Care contracts with *Certified Languages International*.

If a caller expresses a need for language translation these services are accessed by calling 1-800-225-5254. As your phone permits, ask for permission to put the caller on hold, access the translator, and then use the conference call feature on your phone. If your phone does not have a “hold” function, you may need to ask the caller if you can call back, using the “flash” mode on your phone to coordinate a conference call with the interpreter.

When calling the language line, you will be asked your name, **your customer code which is BOALTC**, and for which language an interpreter is needed. Typically an interpreter is immediately available, but on occasion you may be asked for your phone number for a return call.

If you are picking up calls from the 800 line as a substitute for the Intake Specialist and do not have these features available on your phone system, please apologize to the caller and inform them that the appropriate ombudsman will return their call, with an interpreter available.

Messages Requesting Posters or Brochures for Providers

Requests for written materials are typically managed by the Advocacy Specialist, though it is advisable to contact the appropriate ombudsman to ask if she or he is making a visit to the facility soon and might be able to provide the requested materials.

About Unified Messaging

Most staff receive their voicemail messages also by unified messaging, with the message also showing up on their e-mail once it has been transferred from the toll-free line.

Unified messaging for 800 line calls are sent to the e-mailbox of the Advocacy Specialist. It may be advisable to keep the unified messages for 1-2 days, in case an ombudsman has difficulty, for example, hearing the phone number left by the caller. In most cases, unless a caller has a blocked line, the caller's telephone number appears in the message line of the unified message.

Documenting Toll-free Calls

All calls originating on the toll-free line are documented in Ombudsmanager. This is important should there be future questions about when a call was received and a referral made to an ombudsman.

The following is guidance for documenting toll-free calls in O'Manager Program Activities:

Open new Program Activity

In **Activity** box, choose "Technical Assistance for Local Ombudsman" for **Activity Type**, and record number of **instances**, if same caller calls more than 1x/day.

*No entry required in **Number of Contacts** box.*

In **Location** box, enter name of facility, if known. If call is regarding Family Care, PACE or Partnership, choose Family Care from the drop down box.

In **Time Spent** box enter date of call, completing both due date and completed date boxes. Enter time spent managing the call, using increments of 5 minutes. Unless a call-back for more information is required or the caller leaves multiple and lengthy messages, most calls are fully managed within 5 minutes.

*No entry required in **Training** and **Trainees** boxes.*

In **Consultation** box enter caller's name in first **Contact Name** box, and name of BOALTC staff call referred to in second **Contact Name** box.

Enter caller's phone number and/or e-mail in the designated boxes.

In **Activity Comments** box, enter secondary phone #, if provided; enter initials of MCO, if known, for Family Care calls.

After completing the above, in **Consultation** box, click on **Add Topic** to go to **Consultation Topics**.

In **Consultation Topic [(new)]** choose corresponding **Consultation Topic** from the drop down menu. Most common choices might be **Care & Treatment, Ombudsman Services, Resident Rights**, depending on what may be known from the message. If unable to determine topic, choose **Ombudsman Services**.

In **Comments** box, please enter something similar to:

800 line call, caller is concerned with xxxx (or caller does not disclose concern). Call transferred to xxxxx, or caller referred to xxx.

Managing Web-based Requests & Complaints

In addition to the BOALTC's toll-free phone line, persons may also leave messages of complaint, request for materials or other information on the agency's website, using the Online Complaint Form.

The Advocacy Specialist is responsible for checking the website at intervals throughout the day.

Complaints and concerns posted to the website are handled in a similar fashion as toll-free calls.

If enough information is known, the e-mail may be forwarded to the appropriate ombudsman.

If not enough information is known to forward, proceed as for calls left without enough information to triage, either by calling a phone number, if left by the complainant, or by returning an e-mailed response.

Documenting Web-based Requests & Complaints

Documentation of web-based contacts is managed in the same manner as toll-free calls.