

Applies to:
ADRC
Tribal ADRS

Follow-Up Policy

Last revised: September 2020

Aging and Disability Resource Centers (ADRC) and Tribal Aging and Disability Resource Specialists (Tribal ADRS) are expected to follow up with the people who contact them for information and assistance. Follow-up is a required step of options counseling to determine outcomes and to provide additional assistance in locating or using services as appropriate.

Purpose

Follow-up is an important component of ADRC or Tribal ADRS customer service. Not only is follow-up strongly associated with customer satisfaction, but it also allows ADRC staff to ensure a customer is getting the information and assistance they need. Customers often come to the ADRC or Tribal agency with complex questions and concerns; follow-up is an opportunity for staff to more fully address customers' needs.

Definition

Follow-up is the act of making contact with individuals to whom they have provided information and assistance or options counseling to determine whether the customer's needs were met, current status of action plan items and whether additional assistance is needed.

Procedure

Identifying when follow-up is needed after providing information and assistance requires professional judgement. Ongoing discussions and review of customers' situations by ADRC and Tribal ADRS Specialists, a supervisor and/or colleagues can be used to support appropriate follow-up. The [AIRS Standards and Quality Indicators for Professional Information and Referral](#) can also be used as a resource. When unsure whether follow-up is needed, it is best to follow up with the customer. **Follow-up is a required step of options counseling; it should always be provided after the options counseling visit and should be noted in the customer's action plan.**

Follow-up should be provided after information and assistance when any of the following has occurred:

- There is a concern for the customer's safety.
- Information has been sent to the customer.
- The customer making the inquiry has multiple concerns or risk areas.
- A need for options counseling was recognized but the offer was declined.
- ADRC staff have a concern that the organization to which they have referred a customer may not be able to provide the needed service in a way that is satisfactory to the customer.
- A referral is made to a new or unfamiliar service or provider.
- The customer's situation involves a crisis, emergency, or endangerment.
- Basic needs of food, clothing, or shelter were identified as primary issues.

Applies to:
ADRC
Tribal ADRS

- A customer appears to be unable to proceed with the information independently and has declined options counseling.
- The customer appears to be unsure by the information that the ADRC provided.
- The ADRC staff are aware that the customer's next steps involve a long or complex process.

It is important to ask for the customer's permission to follow up with them. During a follow-up contact, make sure that you are speaking to the correct person and avoid disclosing sensitive information or violating confidentiality.

ADRCs should considering implementing procedures to remind staff of the need to place follow-up calls. This could be done using software or other approaches that are appropriate for the agency.

All follow-up contacts must be recorded in the client tracking database using the outcome "Provided Follow Up."