

Required NWD Referral Services Staff Training

All staff must complete the required training curriculum below. Training is divided into foundational, specialized, and annual refresher categories and must be completed within the specified renewal timeframes to maintain competency and support quality service delivery.

Tier 1 – Foundational Competencies (every new I&R staff member) – *Completed every 5 years*

ADRC, LTSS, I&R, Benefits, Documentation, Person-Centered Practices, Confidentiality, and Core Systems.

Tier 2 – Specialized Knowledge Areas – *Completed every 3 years*

Housing, Caregiver Supports, CTLP, Home Care, Crisis Response, Behavioral Health, and Community-Based Programs.

Tier 3 – Annual Professional Development & Quality Improvement – *Completed yearly*

Policy Updates, Customer Service, Reporting & QA, Resource Updates, Best Practices, and Emerging Initiatives.

Tier 1 - New Staff – Completion must be renewed every 5 years

- **Aging Disability Resource Consortia (ADRC) /No Wrong Door (NWD) Overview**
 - ADRC mission, structure, and partnerships
 - Roles of ASAPs, ILCs, and community partners
 - No Wrong Door principles
 - MA ADRC Membership List
- **State Agencies**
 - Executive Office of Aging & Independence (AGE)
 - MassAbility (MBY)
 - Department of Public Health (DPH)
 - Department of Mental Health (DMH)
 - Department of Transitional Assistance (DTA)
 - Executive Office of Healthy & Livable Communities (EOHLC)
 - Department of Developmental Services (DDS)
 - Department of Veterans' Services (DVS)
 - Disability Law Center (DLC)
- **Long Term Services & Supports (LTSS) Overview**
 - What LTSS means
 - Home and community-based services (HCBS)
 - Institutional services
 - Person-centered planning
 - Consumer choice and self-direction

Required NWD Referral Services Staff Training

- **Community-Based LTSS**
 - Personal care services
 - Homemaker services
 - Adult day health
 - Home-delivered meals
 - Transportation
 - Caregiver supports
 - Home modifications
 - Assistive technology
- **Public Programs**
 - MassHealth LTSS programs
 - Frail Elder Waiver
 - Adult Foster Care
 - PACE
 - Home Care Program
 - Nutrition Program
 - Supportive Housing
 - MFP/Community Transition programs
- **Private-Pay LTSS**
 - Home care agencies
 - Assisted living
 - Private care management
 - Private transportation
 - Private homemaker services
- **Institutional LTSS**
 - Nursing facilities
 - Rehabilitation facilities
 - Assisted living
 - Residential options
- **LTSS Eligibility & Access**
 - Financial eligibility basics
 - Functional eligibility basics
 - Referral pathways
 - When to refer to Options Counseling

Required NWD Referral Services Staff Training

- **MassOptions**
 - What is MassOptions
 - MassOptions Assisted Intake
 - MassOptions Portal
 - MassOptions Resources
 - MassOptions Contact Information
 - Visit MassOptions website at: www.massoptions.org

- **Information & Referral (I&R)**
 - I&R standards and best practices
 - Active listening and communication skills
 - Clarifying questions
 - Resource identification and referrals
 - Documentation standards
 - MassOptions Portal

- **Options Counseling (OC)**
 - What is OC
 - How is OC conducted
 - What does OC offer?
 - How is OC different from I&R or HC
 - Eligibility criteria & how to place referrals

- **Documentation Standards**
 - Call Logs
 - Topics and outcomes
 - Activities & Referrals (A&R)
 - Data quality standards
 - Reporting requirements

- **Person-Centered Practices**
 - Person-centered thinking and communication
 - Strengths-based approaches
 - Cultural humility and responsiveness
 - Consumer choice and informed decision-making

Required NWD Referral Services Staff Training

- **MassAbility (MBY)**
 - Independent living
 - Vocational rehabilitation
 - Assistive technology
- **Disability Law Center (DLC)**
 - Disability rights
 - Advocacy services
- **Confidentiality**
 - HIPAA basics
 - Consumer confidentiality
 - Release of information requirements
 - Data security
- **Diversity, Equity, Accessibility & Inclusion (DEAI)**
 - Serving diverse populations
 - Language access requirements
 - Working with interpreters
 - Accessibility and reasonable accommodations
- **Mandated Reporting Basics**
 - Elder abuse overview
 - DPPC overview
 - When and how to report concerns
- **ADRC Systems & Technology**
 - MassOptions
 - Resource database navigation
 - ADRC website resources
 - Consumer documentation systems

Tier 2 – Advanced – Completion must be renewed every 3 years

- **Benefits & Community Programs**
 - Medicare basics
 - Fuel assistance
 - Transportation resources
 - Local Caregiver supports
 - Private Pay Services

Required NWD Referral Services Staff Training

- **Behavioral Health**
 - Mental health resources
 - Substance use disorder resources
 - Hoarding
 - Social isolation
 - Complex consumer situations
- **MassHealth**
 - MassHealth basics
 - Health insurance programs
 - LTSS programs
 - Waivers
 - Adult Foster Care
 - PCA Program
- **Social Security Administration (SSA)**
 - Social Security Retirement
 - SSDI
 - SSI
- **Veterans Services**
 - VA resources
 - State veteran's benefits
 - Local Veterans Service Officers
- **Department of Transitional Assistance (DTA)**
 - SNAP
 - EAEDC
 - Cash assistance programs
- **Emergency Preparedness**
 - Emergency sheltering
 - Disaster resources
 - Utility shutoffs
 - Extreme weather planning
 - What is MEMA

Required NWD Referral Services Staff Training

- **Housing**
 - **Housing Basics**
 - Overview of housing resources in Massachusetts
 - Affordable housing programs
 - Public housing authorities
 - Section 8/Housing Choice Vouchers
 - Subsidized senior housing
 - Supportive housing options
 - **Housing Search & Navigation**
 - How to assist consumers with housing searches
 - Housing applications and waitlists
 - Understanding eligibility requirements
 - Housing documentation requirements
 - **Housing Stability**
 - Eviction prevention resources
 - Utility assistance programs
 - Rental assistance programs
 - Homelessness prevention services
 - **Housing for Older Adults & Individuals with Disabilities**
 - Independent living options
 - Assisted living
 - Adult foster care
 - Shared housing programs
 - Accessible housing and reasonable accommodations
- **Family Caregiver Support Program (FCSP)**
 - Eligibility
 - Available respite services
 - Local support groups
 - Knowledge of Evidence Based Training – Powerful Tools for Caregivers, Savvy Caregiver
 - Referral procedures
- **Community Transition Liaison Program (CTLP)**
 - Transition resources
 - Community living supports
 - Referral pathways

Required NWD Referral Services Staff Training

- **Home Care (HC) Program**
 - Eligibility
 - Available services
 - Referral procedures
- **Crisis Response**
 - Elder abuse & how to report
 - DPPC
 - Suicide awareness
 - Emergency response procedures
 - De-Escalation

Tier 3 - Annual Refresher – Must be completed annually

- **Policy Updates**
 - Found on Aging & Disability for Professionals: <https://adrc.mass-aging-disability.org/>
- **Customer Service**
 - Person-centered practices
 - Cultural competency and humility
 - Effective communication skills
 - Active listening techniques
 - Managing difficult conversations
 - Serving individuals in crisis
 - Trauma-informed approaches
 - Professionalism and customer experience
 - Accessibility and language access
 - Conflict resolution and de-escalation
 - Telephone and virtual service best practices
- **Reporting & Data Quality**
 - Documentation and reporting updates
 - Quality assurance findings
- **Quality Assurance (QA)**
 - Call review process
 - Documentation review
 - Data validation
 - Continuous quality improvement
 - Corrective action and coaching

Required NWD Referral Services Staff Training

○ Accessibility

- Accessibility requirements and best practices
- Reasonable accommodations
- Language access and interpreter services
- Accessible communication and documentation
- Supporting individuals with diverse communication and access needs

○ Resource Updates

- Resource database updates
- Review statewide resources on: www.mass.gov
- Review resources available through ADRC network: <https://adrc.mass-aging-disability.org/>
- Review your own agency's available resources

○ Best Practices

- ❖ Review and list what other agencies and/or states are doing in I&R, OC or in their ADRC
- ❖ Post a comment on Aging & Disability for Professionals of any new ideas to help colleagues in the ADRC Network: <https://adrc.mass-aging-disability.org/>
- Review any new state programs and initiatives

Helpful sites to find trainings:

- ❖ Advancing States: [I&R/A Webinars | advancingstates.org](http://advancingstates.org)
- ❖ Administration for Community Living (ACL): <https://acl.gov/HousingAndServices/training-and-education>
- ❖ Inform USA: [Inform USA Community Roundtables - Inform USA \(formerly AIRS, the Alliance of Information and Referral Systems\)](#)
- ❖ Aging & Disability for Professionals: <https://adrc.mass-aging-disability.org/>
- ❖ State website: www.mass.gov
- ❖ MassOptions: www.massoptions.org