





NWD Referral Services Training

June 2026



Your Partners in Aging.

Brand Values

Partnership – we can achieve more together.

Inclusion – diversity strengthens our state and ourselves.

Justice – combatting ageism is core to our work.

Humanity – caring for each other is why we are here.

Community – it supports and sustains us.

Connection – it's the heart of wellbeing and belonging.

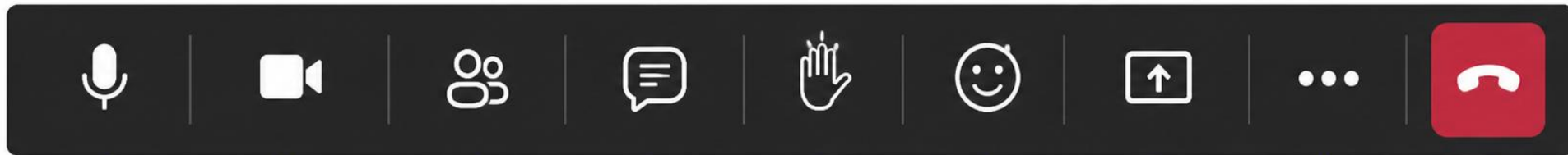
Choice – autonomy is the foundation of independence.



Teams Meeting

How to Participate in Today's Training

Use the Microsoft Teams meeting controls to stay engaged!



Mute / Unmute

Turn your microphone on or off.

Camera

Turn your camera on or off.

Participants

View who's in the meeting.

Chat

Ask questions or share comments.

Raise Hand

Get the facilitator's attention.

Reactions

Give a thumbs up, clap, heart, and more.

Share Content

Share your screen or presentation.

More Actions

Access additional meeting options.

Leave Meeting

Exit the meeting.



Ask Questions
Anytime in Chat



Raise Your Hand
for Discussion



Use Reactions
to Respond Quickly

Knowledge Check

Knowledge Pre-Check



<https://forms.office.com/g/KVkiw1qb5s>

Learning Objectives

Participants will:

- Answer calls using I&R best practices
- Document Activities & Referrals accurately
- Enter and manage Care Enrollments
- Utilize Aging & Disability resources for professionals
- Apply OC timeframes and follow-up requirements
- Improve consistency in documentation and service delivery

Answering a Call



Thank you for calling [*Name of your Agency*].



My name is _____. How can I assist you today?

**Standard
Greeting:**

How To Greet Callers



Which Rapport Building Technique Have You Used Most Often?

Rapport Building Check-In

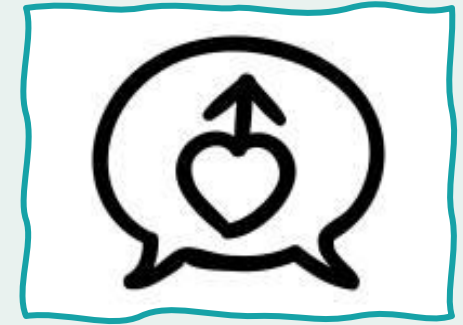


<https://forms.microsoft.com/g/agzafr39Md>



Establish Rapport

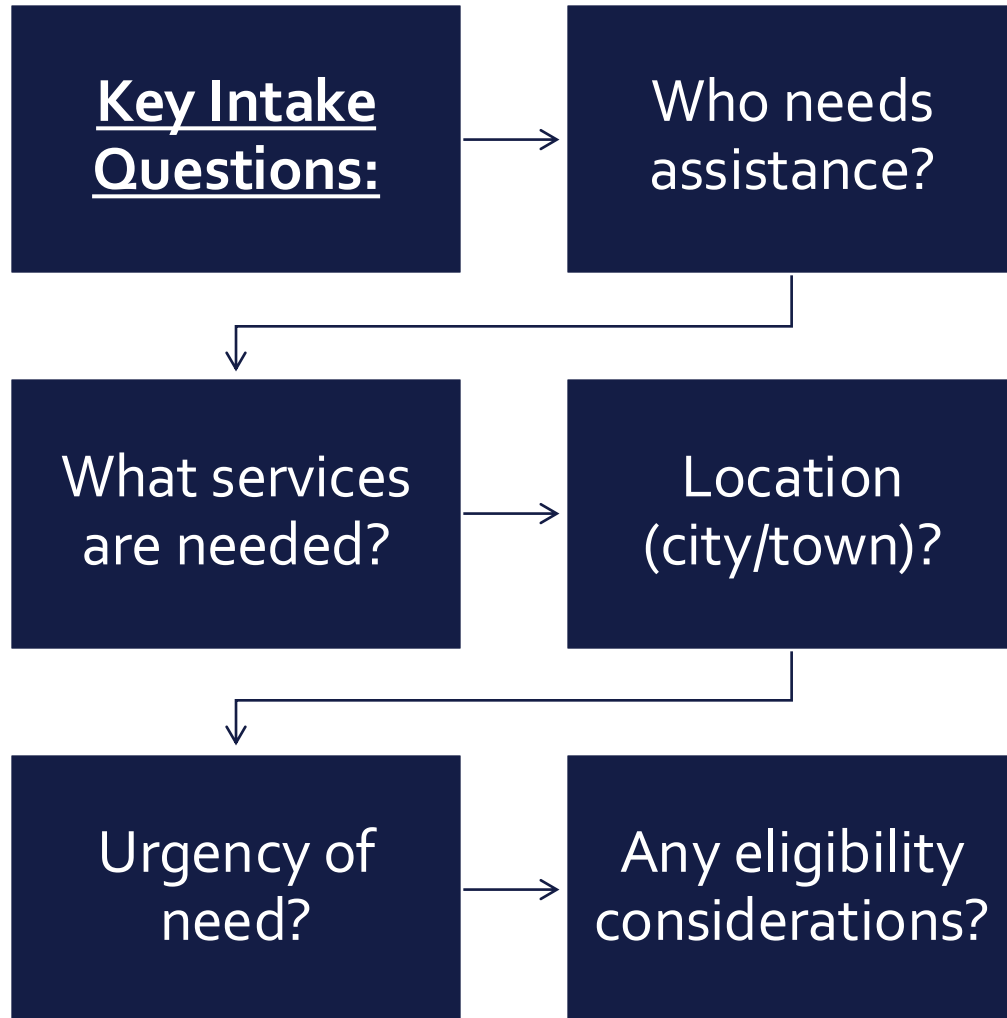
- Introduce yourself professionally
- Use a calm, respectful, and welcoming tone
- Listen without interrupting
- Show empathy and patience
- Acknowledge the caller's concerns or frustrations
- Use person-centered language
- Make the consumer feel heard, valued, and supported



Tone Of Voice



Asking the Right Questions



- Caller's Name
- Caller's contact information - phone number & city/town
- Consumer's Name
- Consumer's contact information - phone number & city/town
- What is needed or being requested?

Identify Needs

- Ask open-ended questions
- Allow the consumer time to explain their situation
- Clarify concerns and gather relevant details
- Identify immediate, short-term, and long-term needs
- Consider barriers such as transportation, finances, language, or caregiver support
- Confirm understanding before moving forward

Crisis or Urgent Call

Recognizing Urgent Situations:

- Immediate health or safety concerns
- Risk of harm to self or others
- Homelessness or lack of safe shelter
- Domestic violence or abuse
- Urgent medical or mental health needs

If a Call is Urgent:

- Stay calm and listen
- Identify immediate risk
- Connect to emergency resources if needed
- Follow agency protocol



Active Listening



Listen carefully



Let the caller explain their situation



Ask clarifying questions



Confirm understanding

Active Listening



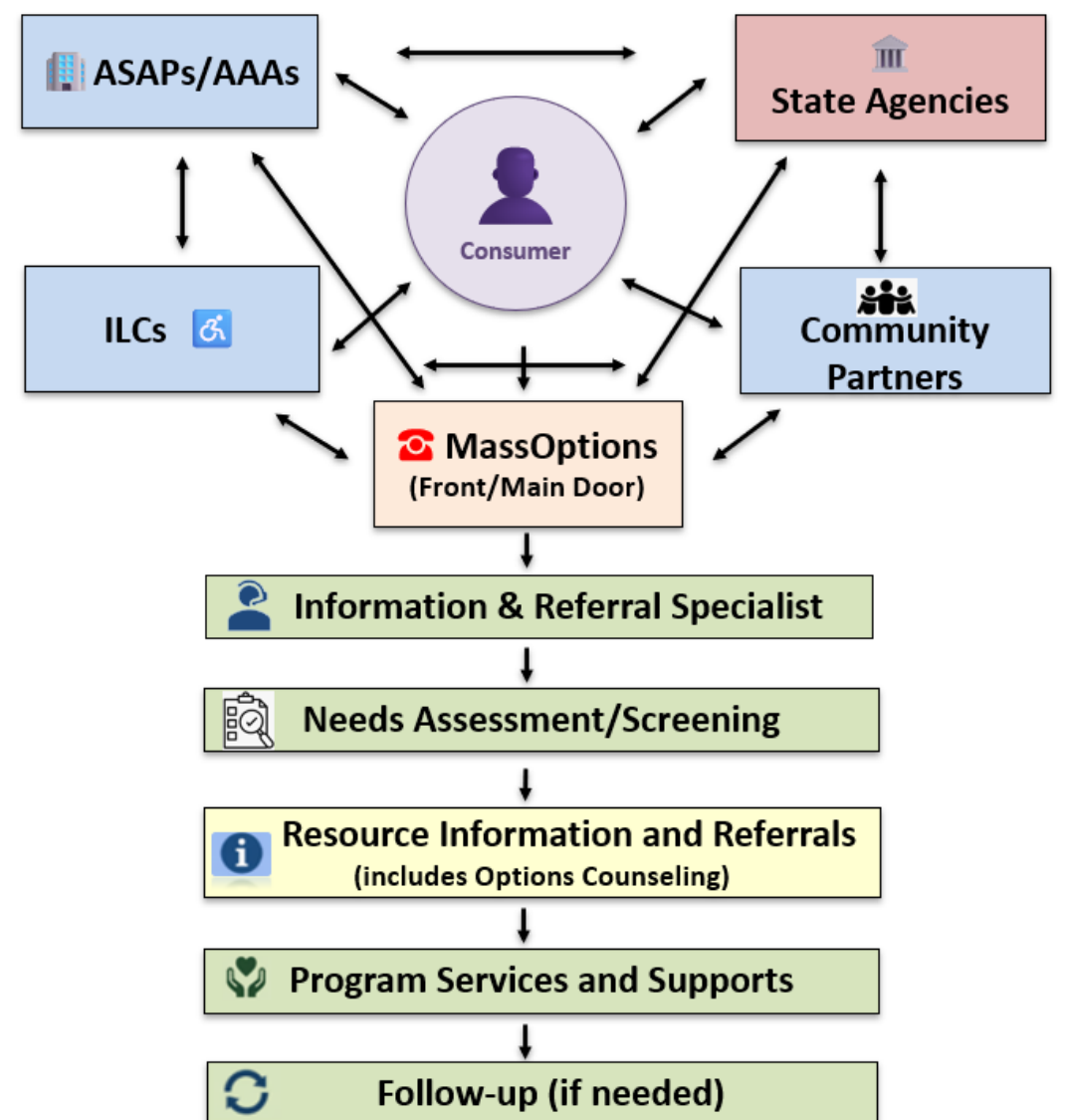
Clarifying Questions



- Can you tell me a little more about that?
- When did this issue begin?
- What type of assistance are you hoping to receive?
- Just to confirm, are you looking for services in your local area?
- Did I understand correctly that transportation is your main concern right now?

Call Flow

- There is no wrong door
- The consumer drives the process
- MassOptions serves as the front/main door, but consumers may move between organizations depending on their needs
- Referrals can move in both directions
- The goal is connection, not handoff



Confirm Understanding

- Review referrals, information, and next steps with the consumer
- Confirm understanding and answer questions
- Clarify timelines, follow-up plans, and contact information
- Provide additional support or explanation as needed



Thumbs Up 👍 or Heart ❤️

A caller requests information about Meals on Wheels. You provide the phone number and website. The caller says, "Okay, that's all I needed." The specialist thanks the caller and ends the call.

The call was closed appropriately.

In closing a call, the I&R Specialist informs the caller, "Okay, I provided you the phone number. Have a nice day."

Before we end, is there anything else I can help you with today?

Closing the Call



- Confirm referrals provided
- Ask if anything else is needed
- Thank the caller
- Example:
“Is there anything else I can help you with today?”

I&R Topics



Topics & Categories

Categories
Aging & Disability Resource Consortia (ADRC)
ASAP Services
Behavioral Health
Caregiving & Support Services
Complaints & Advocacy
Diversity & Cultural Services
Financial & Public Benefits
General Information & Referral
Health/In-home Services
Housing
Institutional & Long-Term Care
Insurance & Medicaid/MassHealth
Legal Services
Government Services
Medical Services
Nutrition & Delivery Services
Safety & Emergency Services
Transportation Services
Volunteering

- **19 Categories** to Link for Reporting Purposes
- Focus Groups & Surveying were completed by the field

I&R Call Topic Guide



- **218 topics down to 126 topics** (with 18 new topics added)
- I&R Specialists utilize topics as the main reason a call came in



Medications	Medical Services	This topic is used for any Mediation requests, referrals or anytime mediation is discussed with the caller. This includes questions related to their prescriptions, how to take, how to obtain/afford, medication dispensing units, etc.
Memory Disorder Resources	Medical Services	This topic would be checked off when giving information out regarding Alzheimer's/Dementia or any related memory disorder resources that are available to assist the individual/family member/professional.
Money Management Program (MMP)	ASAP Services	This topic is selected when a caller is seeking assistance with managing personal finances, organizing bills, or budgeting support, often for older adults or individuals with disabilities.
Moving Forward Plan (MFP)	Insurance & Medicaid/MassHealth	This topic is selected when a caller is seeking information or assistance with transitioning from a nursing facility or long-term care setting back to community living with supports.
Nutrition Services	Nutrition & Delivery Services	This topic is used for inquiries, information, referrals, assessments, counseling, and other services related to nutrition, healthy eating, dietary needs, and nutrition support programs. <i>(Does NOT include HDM's)</i>
OC - Goal to Stay in Community	OC - Options Counseling	<i>(OC use only)</i> This topic is selected when an individual living in the community wants to remain at home and needs planning or supports to maintain independence, without immediate risk of institutional placement.
OC -Goal to Stay in Community-At Risk LTC Admission	OC - Options Counseling	<i>(OC use only)</i> This topic is selected when an individual wants to remain in the community but is at risk of nursing home placement without additional services and supports, requiring Options Counseling intervention.

Program specific



Topics Example

Caller:

Mrs. Jones, age 82, calls MassOptions because she is having difficulty getting to her medical appointments

During the conversation once sent to the ADRC Network, the Information & Referral Specialist learns that:

- She stopped driving six months ago
- She is struggling to prepare meals due to arthritis
- She is worried about paying her electric bill
- Her daughter lives out of state and cannot assist regularly

Topics:

- Transportation
- HDM's
- Financial Assistance
- FCSP
- OC Referral

Another Topics Example

A caller contacts your agency because they have a wheelchair, walker, and shower chair they no longer need and would like to donate the equipment to someone in need.

Topic:

- Donations - Use when the primary purpose of the contact is donating or receiving donated items, funds, or goods, including donated medical equipment.

I&R or OC?

 (or ) = **Information & Referral (I&R)**
 = **Options Counseling (OC)**

A caller contacts your agency looking for the phone number to apply for SNAP benefits. The information is provided, and the caller states they do not need additional assistance.

Answer:  /  Information & Referral

A consumer has recently been discharged from the hospital and is overwhelmed by decisions about housing, home care, transportation, and financial assistance. The consumer needs help exploring options and developing a plan.

Answer:  Options Counseling

I&R or OC? (Little Harder)

 (or ) = Information & Referral (I&R)
 = Options Counseling (OC)

A caller requests information about transportation services and food assistance. During the conversation, the caller states they are comfortable contacting the programs themselves and only wants phone numbers and eligibility information.

Answer:  /  Information & Referral

A consumer recently experienced a decline in health and is unsure whether remaining at home is still safe. The consumer wants to discuss home care, adult day health, moving in with family, and assisted living, and would like help identifying the best option based on their goals and circumstances.

Answer:  Options Counseling

Last One – I&R or OC?

 (or ) = Information & Referral (I&R)
 = Options Counseling (OC)

A caller requests information about home-delivered meals. During the conversation, they become emotional and explain that they are struggling to live independently, have no local supports, and don't know what services they may need.

Answer:  Options Counseling

Options Counseling (OC)



OC Cycle



 *Timely follow-up ensures consistent case progression*

OC is designed to support informed decision-making and short-term coordination, not ongoing case management.

OC Activities & Referrals (A&R) – Adding New

Save | Save and Close | Close | Print ▾ | Open Audits | Format Panels | Disable Timer | Pause | Search for Services | **Add New ▾**

OK

Call Type Incoming ▾

Caller (Anonymous)

Caller Type (Self)

Activity
Assessment
Call Topic
Referral
Service Delivery

Activities Add New | Open | Delete | Copy |

ADRC Outcomes Open

Topics Select Topics | Delete Topics |

Notes

Referrals Generate Activity | Search | Print | Add New | Open | Delete |

Related Calls Open |

Assessments Compare | History | Add New | Open | Copy From | Print |

Service Deliveries Add New | Open |

OC A&R Basic Info

and Close | Close | Add Next | Make a Copy | Print ▾ | Open Audits | Format Panels |

Subject	
Action	
Agency	Executive Office of Elder Affairs ▾
Provider	
Subprovider	
Care Program	
Site	
Status	Not Started ▾
Reason	
Status Date	1/16/2026
Due Date	Enter date
Start Date	Enter date
Start Time	Enter time
Date Completed	Enter date
Time Completed	Enter time
Follow-Up Status	Not Required ▾
Follow-Up Date	Enter date
Follow-Up Time	Enter time

[Format Property List](#)

Comments

Services

- **Subject** = What is trying to be done (free text field)
- **Action** = Name of the A&R
- **Agency** = <Your Agency>
- **Provider** = Options Counselor Assigned to consumer
- **Status** = Set to Not Started – will be changed to in progress and completed when done
- **Status Date** = Date A&R is being entered
- **Due Date** = Within **2 business days** of receiving an OC referral. OC session within **5 business days** of the initial OC referral. Follow-up within **5 business days** of last OC counseling session.

OC A&R - Changing Status

The screenshot displays the OC A&R system interface. The main form contains the following fields:

- Subject:** OC Referral
- Action:** OC - Referral
- Agency:** Executive Office of Elder Affairs
- Provider:** Annette Peele (IR Supervisor)
- Care Program:**
- Status:** Not Started
- Reason:**
- Status Date:** 6/23/2026
- Due Date:** 6/30/2026
- Start Date:** 6/23/2026
- Start Time:** Enter time
- Date Completed:** Enter date
- Time Completed:** Enter time
- Follow-Up Status:** Not Required
- Follow-Up Date:** Enter date
- Follow-Up Time:** Enter time

A black arrow points from the 'Status' dropdown menu to a detailed view of the dropdown options. The options are:

- Not Started
- Approved
- CCTP - Consumer Declined
- Client Closed
- Completed
- Deferred
- Denied
- In Progress** (highlighted with a red circle)
- Invoice Adjustment
- Not Started
- Referral Failed

Why Activities & Referrals (A&R) Matter



- ✓ Documents services provided
- ✓ Supports compliance & QA standards
- ✓ Tracks consumer needs and outcomes
- ✓ Improves continuity of care
- ✓ Supports reporting and funding
- ✓ Identifies service gaps and trends
- ✓ Strengthens person-centered service delivery

Opening OC Care Enrollments

Field	What to Enter
Level of Care	State Programs
Service Program	OC – Options Counseling
Care Program	OC – Options Counseling
Application Date	Day the applicant reached out to your agency
Received Date	Day the OC acknowledged the new OC referral
Status	Active
Status Date	Day OC is completing data entry in A&D
Start Date	Date applicant was deemed eligible and opened under OC Program

Details Activities & Referrals

Care Enrollment - OC - Options Counseling

OK | Cancel | Add Next | Open Audits |

Level Of Care

State Programs

Service Program

OC - Options Counseling

Care Program

OC - Options Counseling

Application Date

4/1/2026

Received Date

4/2/2026

Termination Date

Enter date

Status

Active

Reason

Status Date

4/2/2026

Start Date

4/2/2026

End Date

Enter date

Originated By: Executive Office of Elder Affairs Creator: Karyn Wylie

Why Closing Enrollments Matters

Field	What to Enter
Level of Care	State Programs
Service Program	OC – Options Counseling
Care Program	OC – Options Counseling
Application Date	Day the applicant reached out to your agency
Received Date	Day the OC acknowledged the new referral
Termination Date	Date consumer is closing out of OC
Status	Use Inactive when closing an OC case. Use Terminated only if consumer expired or moved out of Massachusetts
Status Date	Day OC completes data entry in A&D
Start Date	Date applicant was deemed eligible and opened under OC Program
End Date	Date consumer is closing out of OC

- ✓ Maintains accurate records
- ✓ Supports compliance & QA standards
- ✓ Improves reporting and data integrity
- ✓ Clarifies consumer outcomes
- ✓ Prevents inactive cases remaining open
- ✓ Reinforces appropriate OC service boundaries
- ✓ Supports efficient workflow management

Let's Check In

Aging & Disability for Professionals - Serving Massachusetts Older Adults and People with Disabilities | [AGE Home](#) | [ADRC Home](#) | [Information & Referral](#) | [Options Counseling](#) | [About Aging & Disability](#) | [MassOptions](#)

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The Massachusetts ADRC model builds upon the existing infrastructure of two key agency networks: Aging Service Access Points (ASAP's)/ Area Agencies on Aging (AAA) & Independent Living Centers (ILC's).

ADRC staff provide objective, unbiased information, counseling & assistance to people with all levels of income. ADRC's empower individuals & Caregivers to make informed decisions about their long-term services & supports; and help people access public & private programs. ADRCs are an important part of the [No Wrong Door \(NWD\)](#) system model, meaning an individual only needs to call once to get the assistance they need, the agencies work together behind the scenes to get the individual to where they need to be.

There are 11 ADRCs in Massachusetts organized around the service areas of the 10 ILC's.

Together we can achieve more.

This site contains information for Massachusetts professionals and providers who support older adults and people with disabilities.

Please select the [Information and Referral](#) or the [Options Counseling](#) tab located at the top of this page for information specific to those roles.

Contact: For any questions or further information please contact Karyn Wylie Karyn.Wylie@mass.gov

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Recent Posts

- [ADvancing States – I&R/A](#)
- [Events at the 2026 National HCBS Conference](#)
- [Required NWD Referral Services Staff Training](#)
- [ADRC Outreach Online Reporting – FY26 Summary](#)
- [I&R User Guide for Aging Disability \(A&D\)](#)
- [Making Medicare Affordable: What Every I&R Specialist Should Know – Webinar](#)

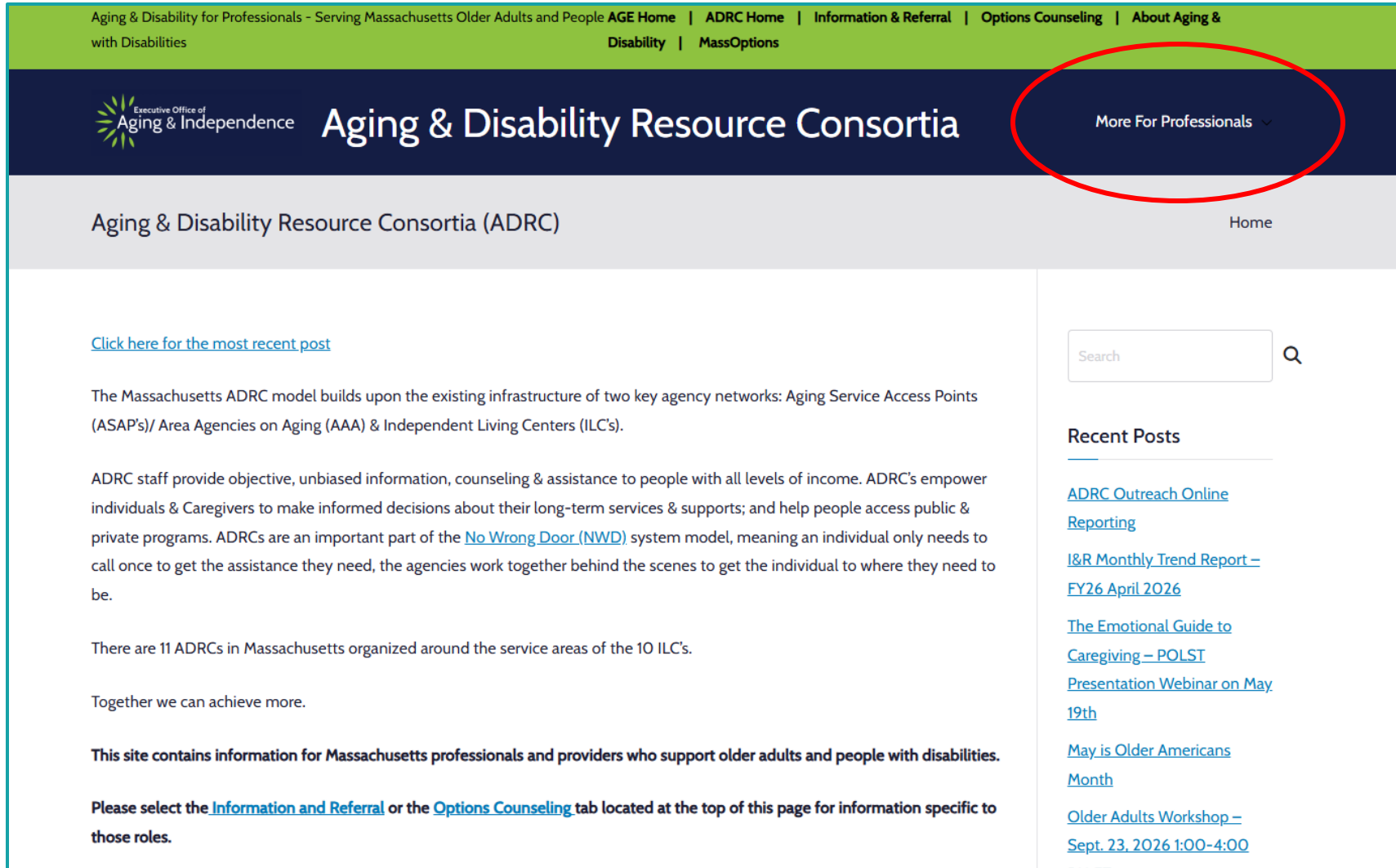
 Thumbs Up = Yes, I have checked this site

   Emoji Face = No, I have not checked or visited this site

 Raise Hand = I wasn't aware of this site

Aging & Disability For Professionals

Easier, Faster, Connected



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- [ADRC Outreach Online Reporting](#)
- [I&R Monthly Trend Report – FY26 April 2026](#)
- [The Emotional Guide to Caregiving – POLST Presentation Webinar on May 19th](#)
- [May is Older Americans Month](#)
- [Older Adults Workshop – Sept. 23, 2026 1:00-4:00](#)



When To Use?

- Give you access the most current updates and resources in one place
- Locate training materials and key documents
- **Go To Spot** - primary communication platform that will also hold upcoming trainings, conferences, reports, learning management opportunities, newsletters, etc.

Easy Access To Each Program

This site contains information for Massachusetts professionals and providers who support older adults and people with disabilities.

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Links to Additional Pages – Click Away



ADRC Resource & Update Hub

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Any Suggestions?

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New Features



Any Questions?



Post Knowledge Check

Knowledge Post-Check



<https://forms.office.com/g/72jpxzPKk7>



THANK YOU!

Community Programs
Team