ADRN Presentation

O4a 2026

Agenda

- Purpose
- Statewide data
- Current state
- Future Vision
- Questions & Discussion

What are the efficiencies needed in your ADRC?

What are the opportunities you see in your ADRC?

Purpose

Explore how Ohio's Aging and Disability Resource Network (ADRN) can modernize to meet changing expectations from consumers, health care partners and community organizations.

- **Modernize access.** Improve information, referral and navigation systems for timely, person-centered access to home and community-based services.
- **Strengthen partnerships.** Improve referral quality and coordination across social service, aging, health care and community partners. Expand health care partnerships and contracting opportunities.
- **Use technology and data.** Explore how technology, data and new partnerships can support social work practice, reduce barriers, strengthen care coordination and connect individuals and families with community resources.

Statewide Data

ADRC Profile: Direction Home Akron Canton (10b)

- Functions: Screening, Assessment, PAR
- Staff: 9 screeners, 22.5 assessors, 2.5 PAR staff, 9 support staff
- Trends: weekly referrals over 700, 18% growth in referrals in 2 years, 41% and 44% increase in support navigation and assessments over same time
- Efforts: overflow call handling, support nav note templates, performance dashboards

Ohio’s Front Door serves 30,078 people monthly

30,078

Average monthly clients

360,936 annual volume reported

87%

Reported statewide average for successful connections

Demand is increasing

Most AAAs report 10–30% growth in clients served over two years.

Several report growth above 50%.

Healthcare leads referrals

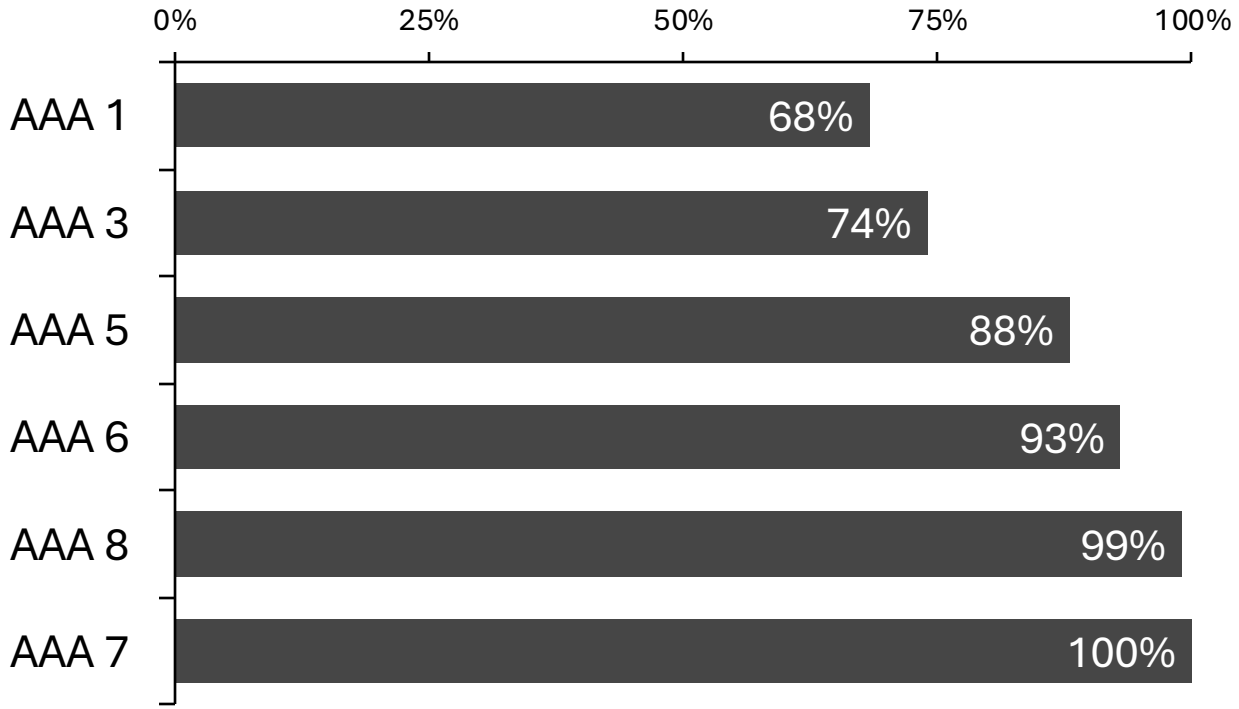
Hospitals and physicians rank first.

Other leading sources include care facilities, family caregiving providers and home health agencies.

Source: May 2026 o4a Front Door Survey. Client counts exclude PASSPORT assessments. Annual volume = monthly average × 12.

Front Door funding relies heavily on PASSPORT

Selected agency funding shares, August 2024



Multiple funding streams

The 2024 report ranks Medicaid first, followed by Title III and levy funds.

Other sources include HEAP, MIPPA and OBLTSS.

Source: AAA ADRN/Front Door Funding & Referrals, August 12, 2024. Agency funding scopes vary. These are examples, not a statewide weighted share.

Current State

Operational efficiencies & Healthcare Referrals

ADRC Profile: Western Reserve AAA (10a)

- Functions: Screening, Assessment, PAR
- Staff: 11.5 Screeners, 16 FT/9 PRN and PT Assessors, 2.5 PAR, 12 Support Staff
- Trends: Monthly referrals up 400-600 per month and daily call volume avg 420/day = 20-25% increase over one year; Assessment increased 300+ per month, 140% increase in Initial MyCare LOC
- Efforts: Technologies, referent grouping, 2-part assessment process

Challenges, Driving Factors and Opportunities

- **Increased need from the community**
  - Demographics
    - By 2030 1 in 4 Ohioans are projected to be 60+
    - Living longer; more age-related disabilities
  - Economic drivers
  - Next Gen MyCare Ohio
  - SDoH Screenings
  - New Services and Providers*
- **Workforce Shortage**
- **Woeful Underfunding**
- **Technology!**
  - Unable to Reach
    - SPAM Risk-high call business + only a few SPAM reports = SPAM RISK notification.
      - Solution: firstorion.com
    - Not recognize number; varying caller ID display by service provider
      - Solution: Branding Services

Technology and Automation Opportunities

- **What is Automation**
  - Automation is the application of technology, programs, robotics or processes to achieve outcome with minimal human input.

- **Guiding Automation Decisions**
  - Fix the processes first; cannot save a broken workflow; it speeds up the chaos!
  - Automate drudgery, not judgment
  - Involve your workforce; people rarely resist automation; they resist being left out

  - **On Efficiency:** *"Automation magnifies inefficient processes, so automation is not the solution for underlying operational problems."* — **Bill Gates**
  - **On Human Focus:** *"Automating repetitive tasks frees human force for higher-level product quality work."* — **Anna Brackett**

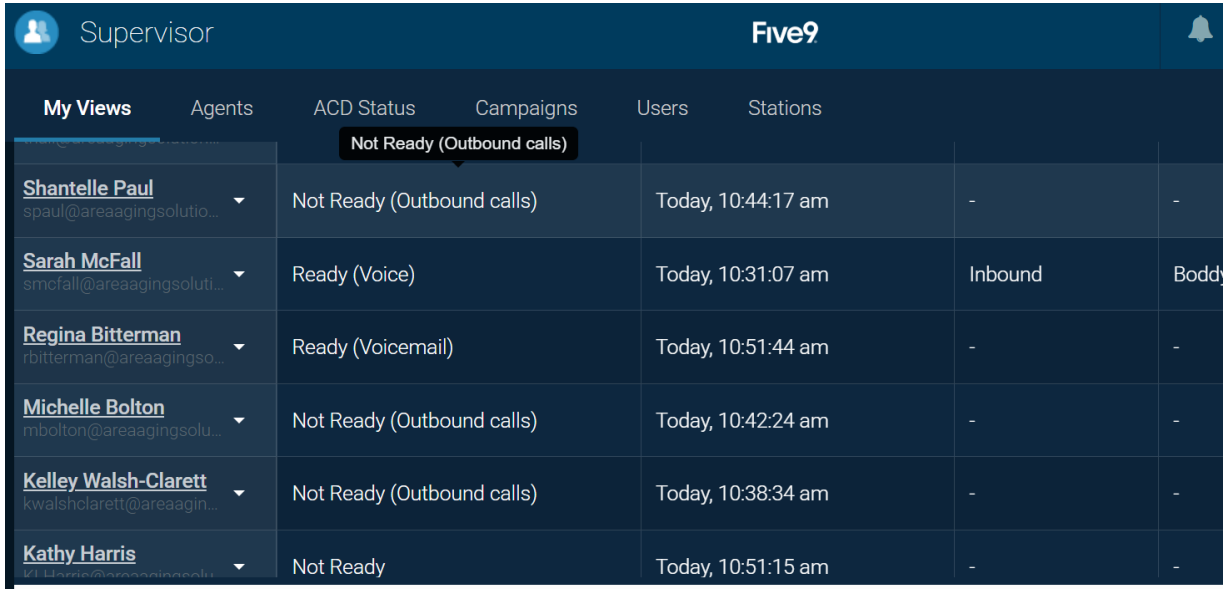
Five9 Call Center

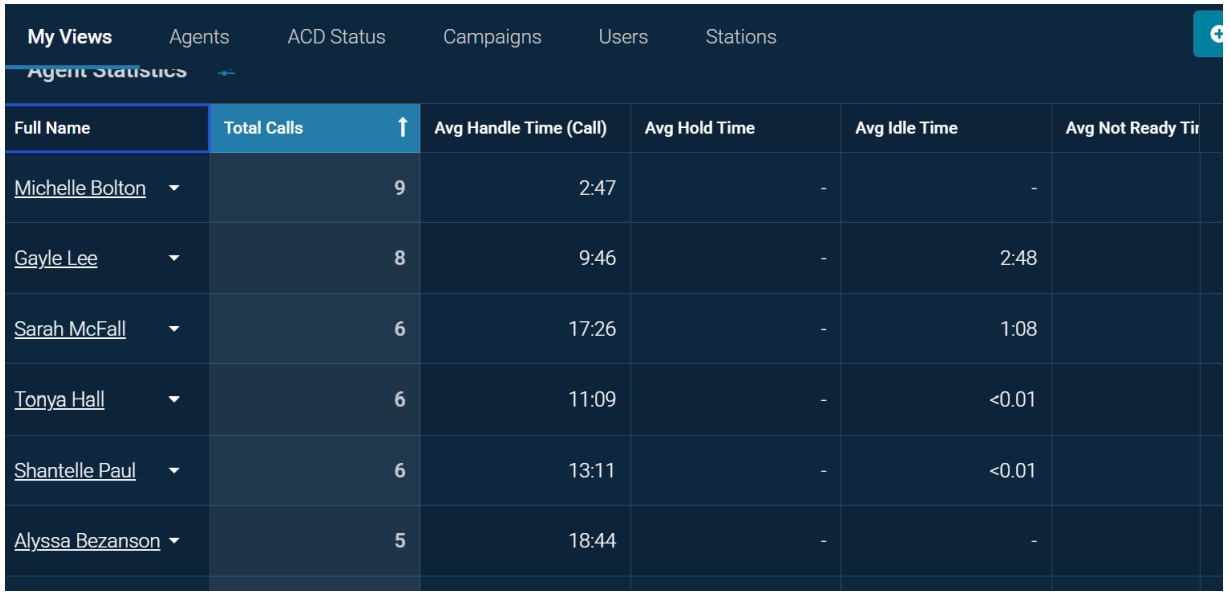
Call handling

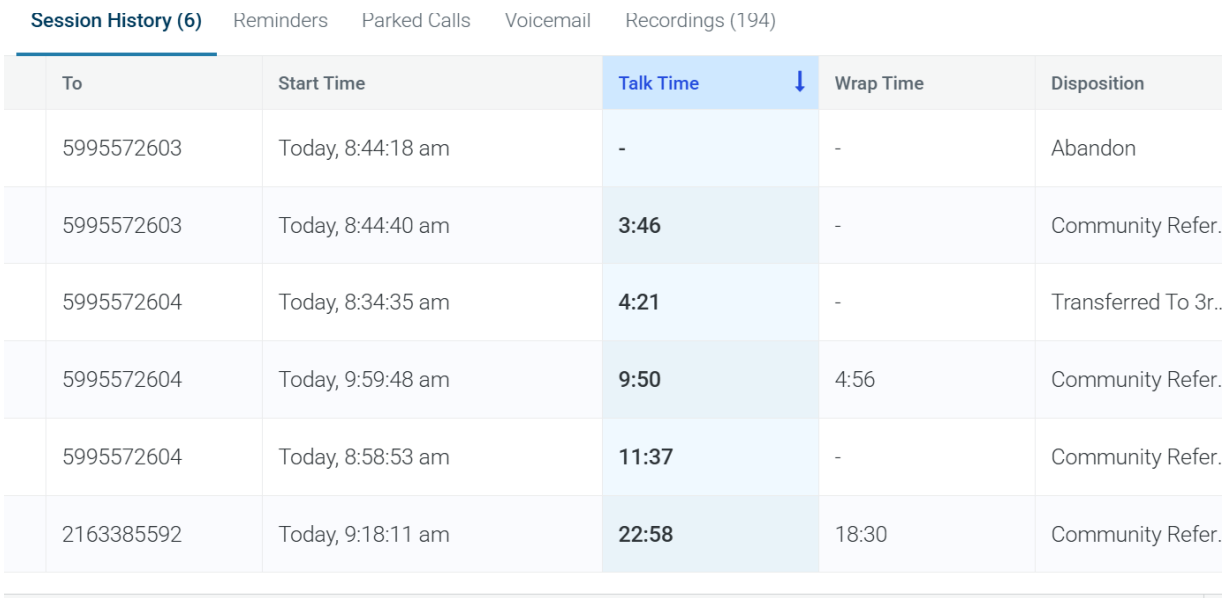
- Record calls and support staff with supervisor whisper.
- Customize messages for after hours, holidays and times when no agents are available.
- All prior interactions, including SMS appear on desktop for quicker case understanding

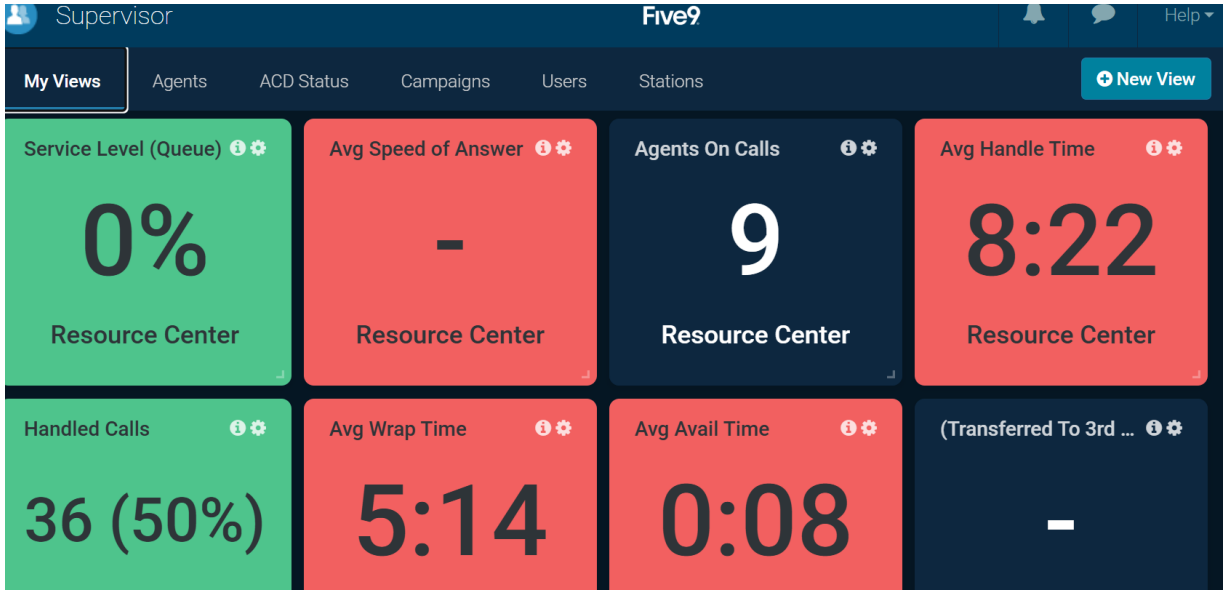
Planning and oversight

- Review call data by campaign and staff member.
- Use disposition codes to inform strategic planning.
- Identify needs and trends for staffing needs, coaching and training needs


Supervisor
Five9
My Views
Agents
ACD Status
Campaigns
Users
Stations
Not Ready (Outbound calls)
Shantelle Paul
spaul@areaagingsolutio...
Not Ready (Outbound calls)
Today, 10:44:17 am
-
-
Sarah McFall
smcfall@areaagingsoluti...
Ready (Voice)
Today, 10:31:07 am
Inbound
Regina Bitterman
rbitterman@areaagingso...
Ready (Voicemail)
Today, 10:51:44 am
-
-
Michelle Bolton
mbolton@areaagingsolu...
Not Ready (Outbound calls)
Today, 10:42:24 am
-
-
Kelley Walsh-Clarett
kwalshclarett@areaagin...
Not Ready (Outbound calls)
Today, 10:38:34 am
-
-
Kathy Harris
Not Ready
Today, 10:51:15 am
-
-


My Views
Agents
ACD Status
Campaigns
Users
Stations
Full Name
Total Calls
Avg Handle Time (Call)
Avg Hold Time
Avg Idle Time
Michelle Bolton 9 2:47 - -
Gayle Lee 8 9:46 - 2:48
Sarah McFall 6 17:26 - 1:08
Tonya Hall 6 11:09 - <0.01
Shantelle Paul 6 13:11 - <0.01
Alyssa Bezanson 5 18:44 - -


Session History (6)
Reminders
Parked Calls
Voicemail
Recordings (194)
To
Start Time
Talk Time
Wrap Time
Disposition
5995572603 Today, 8:44:18 am - - Abandon
5995572603 Today, 8:44:40 am 3:46 - Community Refer.
5995572604 Today, 8:34:35 am 4:21 - Transferred To 3r..
5995572604 Today, 9:59:48 am 9:50 4:56 Community Refer.
5995572604 Today, 8:58:53 am 11:37 - Community Refer.
2163385592 Today, 9:18:11 am 22:58 18:30 Community Refer.


Supervisor
Five9
Help
My Views
Agents
ACD Status
Campaigns
Users
Stations
New View
Service Level (Queue)
0%
Resource Center
Avg Speed of Answer
-
Resource Center
Agents On Calls
9
Resource Center
Avg Handle Time
8:22
Resource Center
Handled Calls
36 (50%)
Avg Wrap Time
5:14
Avg Avail Time
0:08
(Transferred To 3rd ...
-

Auto Dialer

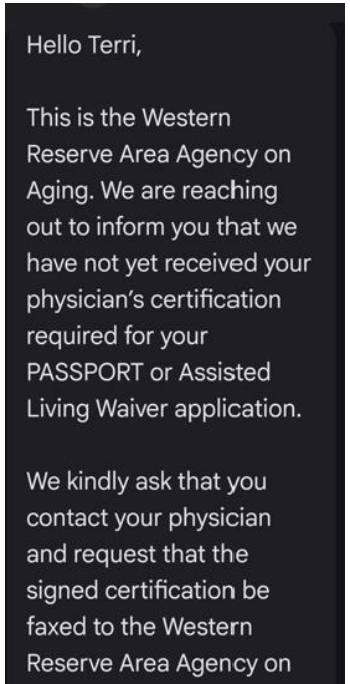
Outbound calls and personalized text campaigns

Automated calling

- Upload outreach lists that dial out.
- Connect answered calls to available staff or system leaves a message if no answer.
- Reports for UTC documentation

Text campaigns

- Send personalized mass texts, including “Need MD” messages.
- “We will call you today from 216-539-xxxx.”

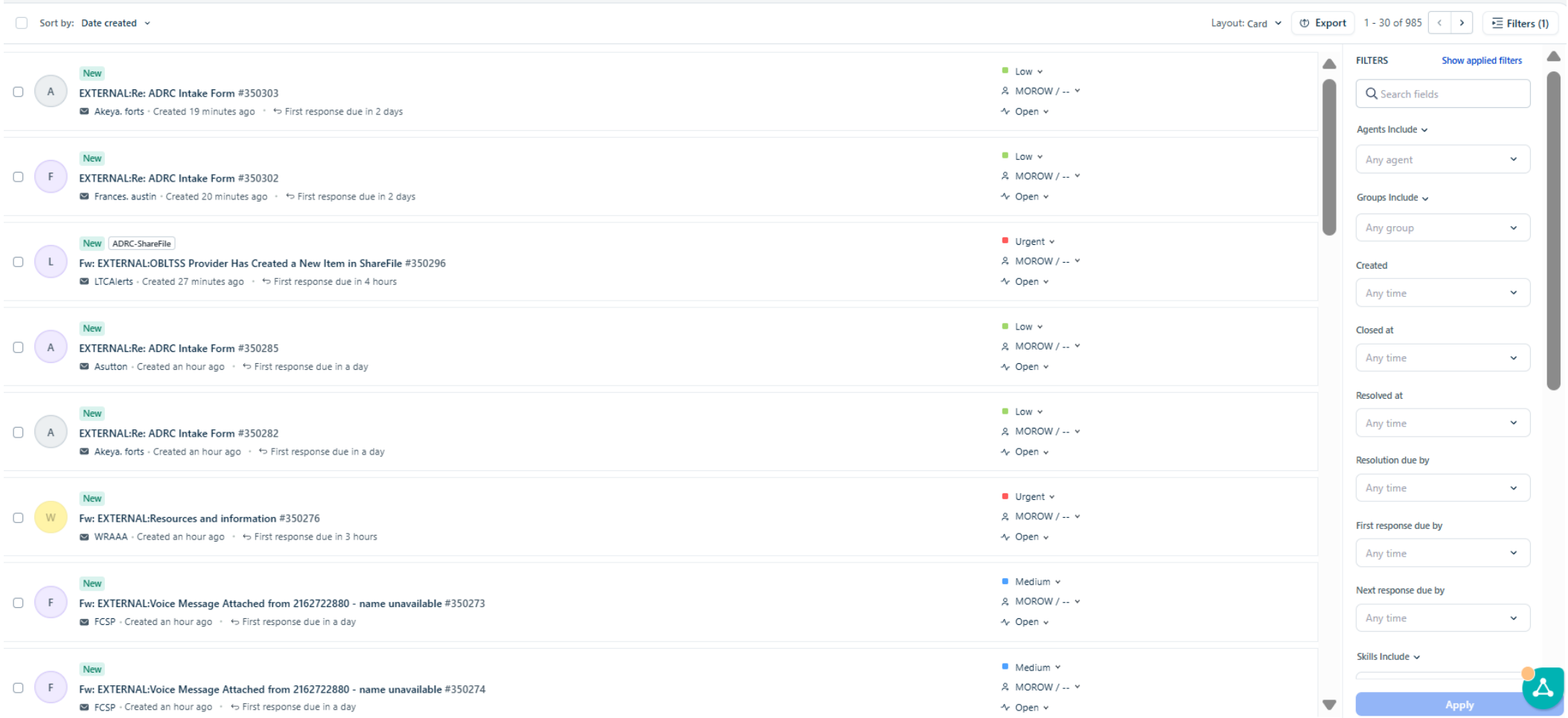


Human decisions remain essential. Some calls and texts are not appropriate for automation.

Freshdesk Ticketing

One place to manage referrals from multiple sources

Collect referrals	Bring voicemail, online referrals, Unite Us, emails, and other referral sources into a central ticketing system. Group referrals, remove duplicates, identify URGENT
Assign staff	Assign tickets to staff and organize referral follow-up.
Monitor demand	Monitor referral volume and response time. Track referral sources
Respond directly	Communicate with referral sources through Freshdesk.

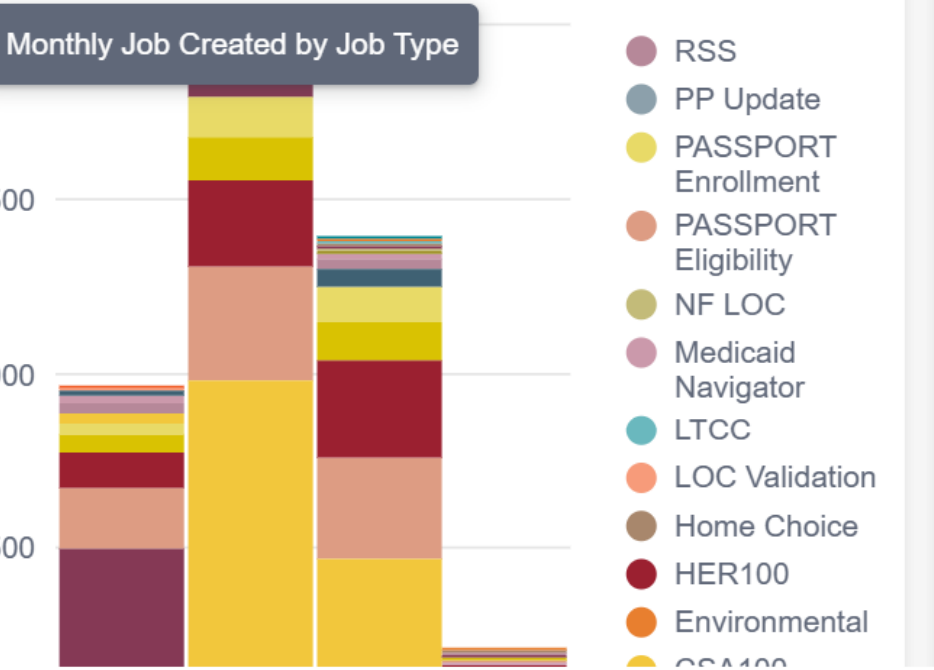

Sort by: Date created
Layout: Card
Export
1 - 30 of 985
Filters (1)
New
EXTERNAL:Re: ADRC Intake Form #350303
Akeya. forts · Created 19 minutes ago · First response due in 2 days
Low
MOROW / --
Open
New
EXTERNAL:Re: ADRC Intake Form #350302
Frances. austin · Created 20 minutes ago · First response due in 2 days
Low
MOROW / --
Open
New
ADRC-ShareFile
Fw: EXTERNAL:OBLTSS Provider Has Created a New Item in ShareFile #350296
LTCAlerts · Created 27 minutes ago · First response due in 4 hours
Urgent
MOROW / --
Open
New
EXTERNAL:Re: ADRC Intake Form #350285
Asutton · Created an hour ago · First response due in a day
Low
MOROW / --
Open
New
EXTERNAL:Re: ADRC Intake Form #350282
Akeya. forts · Created an hour ago · First response due in a day
Low
MOROW / --
Open
New
Fw: EXTERNAL:Resources and information #350276
WRAAA · Created an hour ago · First response due in 3 hours
Urgent
MOROW / --
Open
New
Fw: EXTERNAL:Voice Message Attached from 2162722880 - name unavailable #350273
FCSP · Created an hour ago · First response due in a day
Medium
MOROW / --
Open
New
Fw: EXTERNAL:Voice Message Attached from 2162722880 - name unavailable #350274
FCSP · Created an hour ago · First response due in a day
Medium
MOROW / --
Open
FILTERS
Show applied filters
Search fields
Agents Include
Any agent
Groups Include
Any group
Created
Any time
Closed at
Any time
Resolved at
Any time
Resolution due by
Any time
First response due by
Any time
Next response due by
Any time
Skills Include
Apply

Skedulo Scheduling

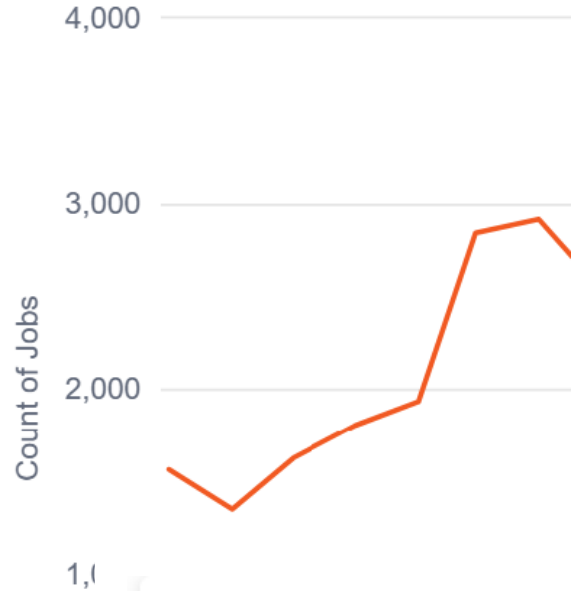
Automation and optimization

Staff assignment	Match appointments to the specific skills required.
Travel planning	Optimize scheduling to reduce travel time.
Appointment reminders	Send automated text reminders for scheduled appointments.
Arrival and departure	Track visit times to help inform productivity expectations.

hly Job Created by Job Type



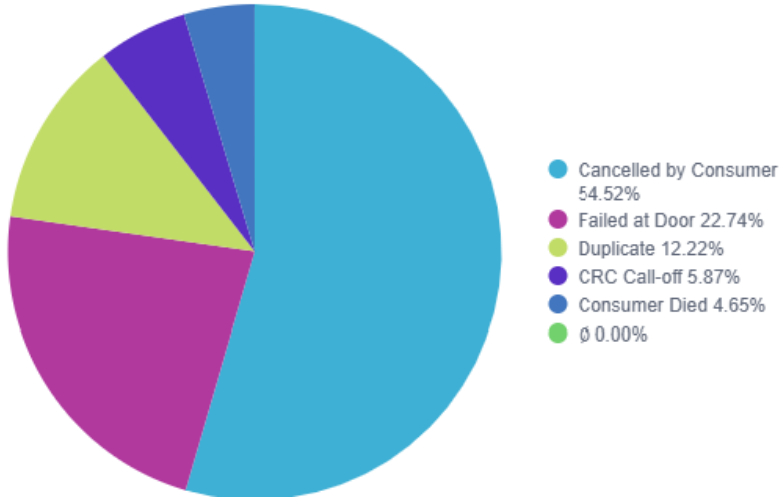
Monthly Created Jobs Trend



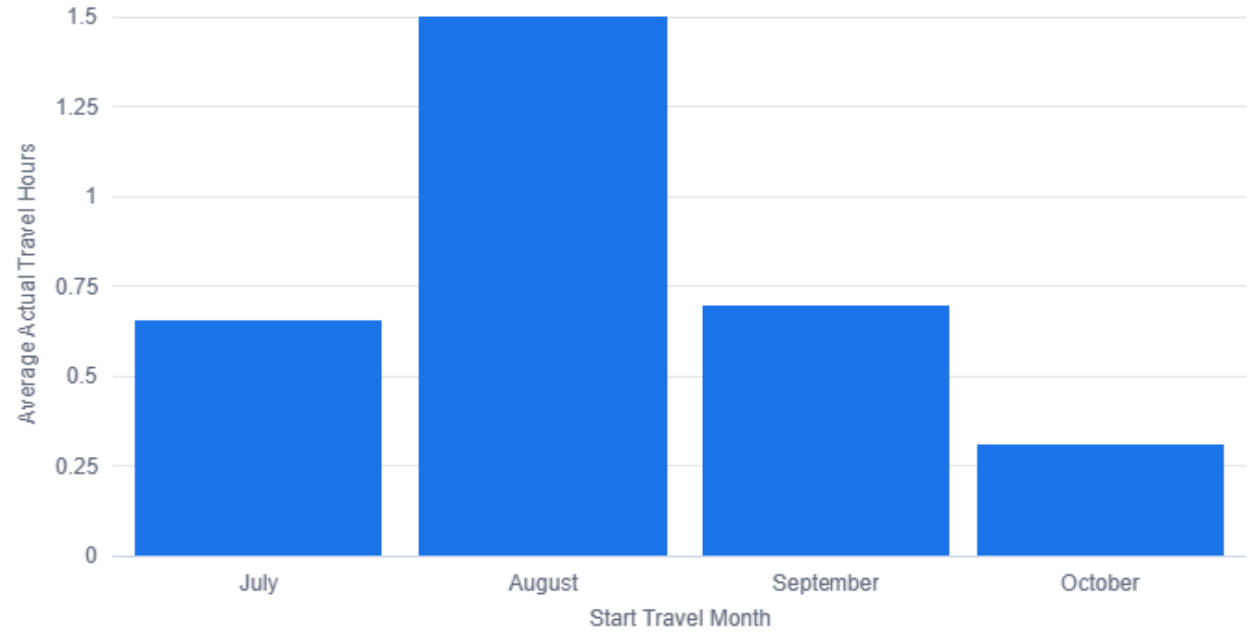
completed & cancelled rates by Job typ…

Job Type	Region Name	Count of Jobs	Completion Rate	Cance Rate
CSA100…	Cuyahoga	1,398	55.72%	20.6
PASSP…	Cuyahoga	687	74.67%	21.5
HER100	Cuyahoga	531	72.69%	17.5
CSA100	Cuyahoga	519	67.82%	24.8
PASSP…	Cuyahoga	251	59.36%	0.40
Assisted…	Cuyahoga	208	87.50%	10.1
Assisted…	Cuyahoga	137	42.34%	0.73
RSS	Cuyahoga	75	77.33%	21.3
HER100	Lorain	66	84.85%	13.6

Job Cancellation Reasons

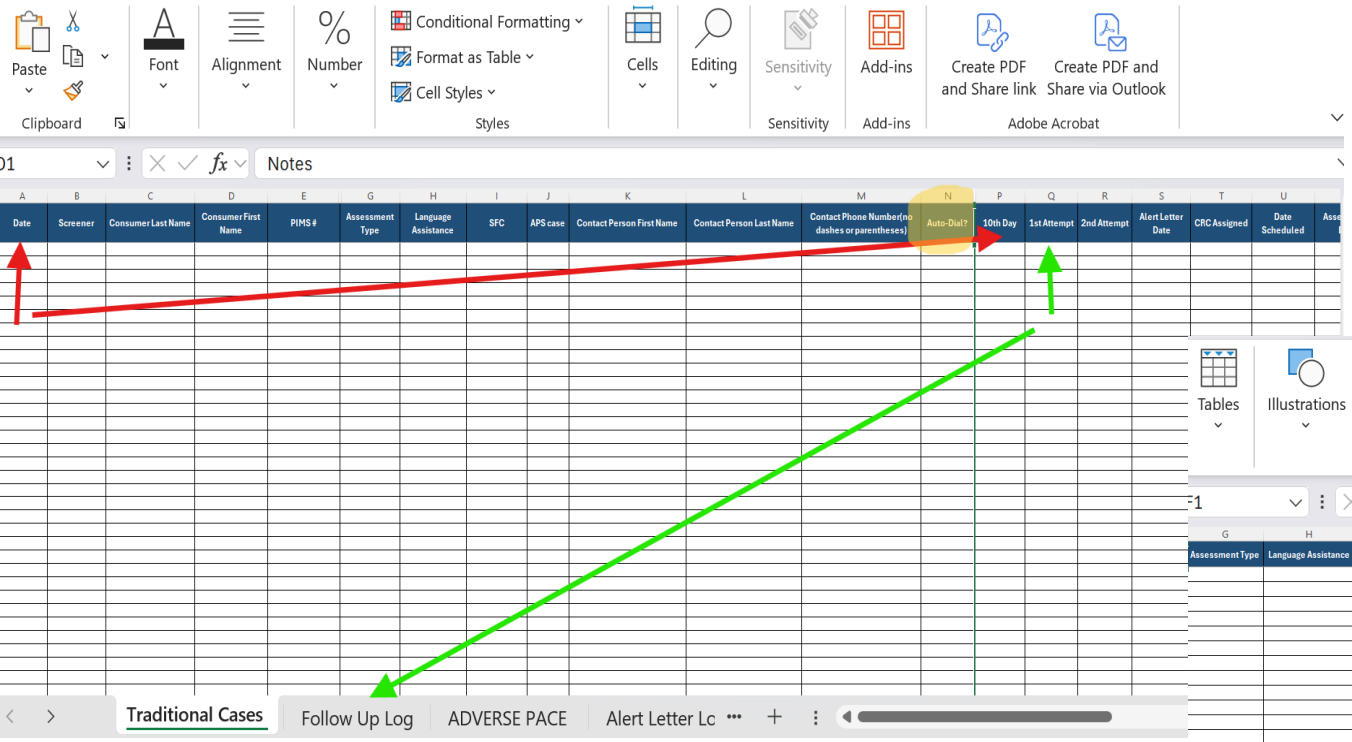


Average Travel Time



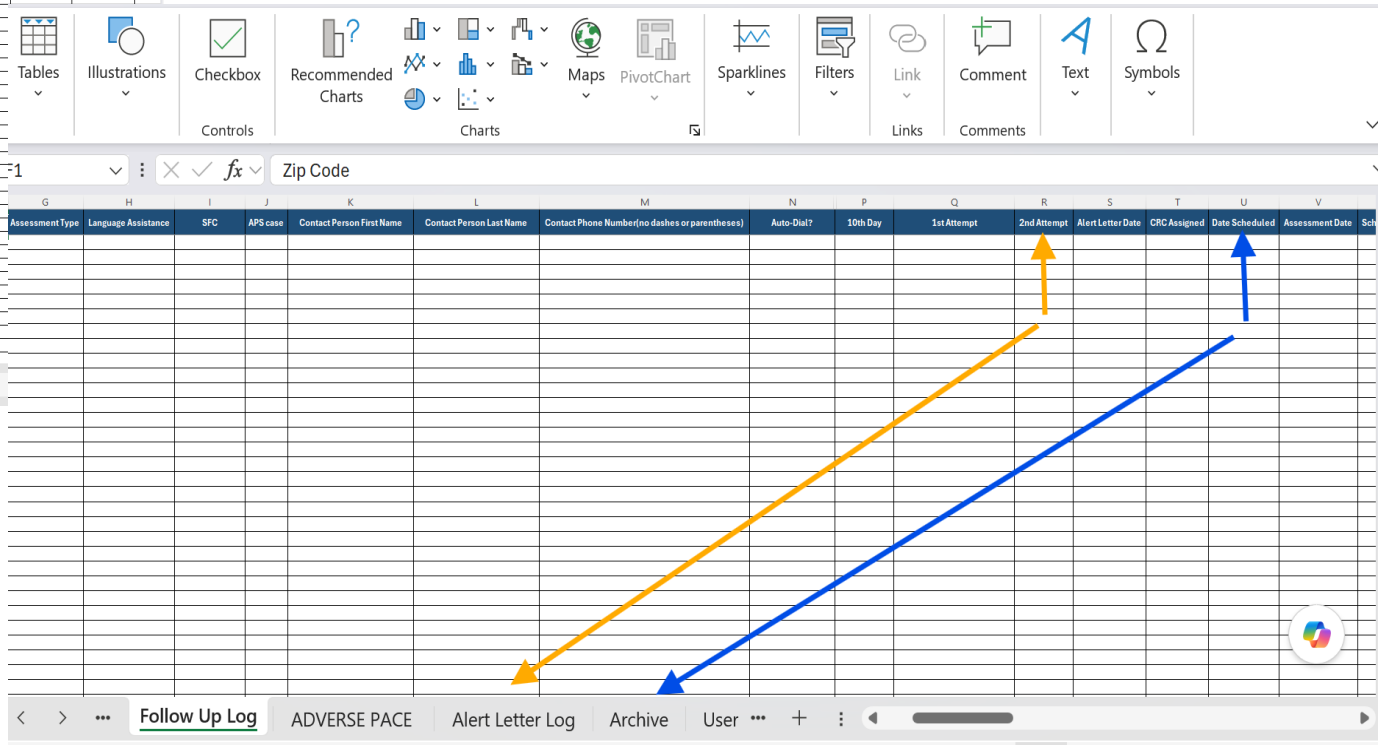
Modernized "Old Tech"

Excel Spreadsheet used to better manage assessment scheduling attempts and UTC



Automate excel actions based on input provided.

- Reduces errors and missed follow up calls
- Assign staff to specific tasks to improve compliance



Power Automate

Follows configured instructions for repeatable computer tasks, including writing information into Excel.

Current use

- Look up eligibility for MyCare enrollees.
- Recheck before assessment to identify MyCare conversions.

***Future opportunity**

- Enter standard UTC notes in SAGE and OB journal entries.
- Read journal notes for ALW verbiage.
- Opportunities!

Business Intelligence (BI)

Brings historical and current data from operational systems together for analysis and reporting.

ADRC-wide view	Connect referral and call data to understand demand and service outcomes. Provider Listing and Enrolled members
Resource Center	Review outstanding referrals, referral sources and community needs.
Operational follow-up	Track unit and staff activity, plus pending cases and overdue actions.

BI: Resource Center and Staff Reporting

Reporting priorities for service demand and workload

Resource Center and unit view

Outstanding referrals, total and by source

Days outstanding and volume changes

Outcomes and dispositions that reveal community needs

Peak call times and abandonment rates

Individual staff view

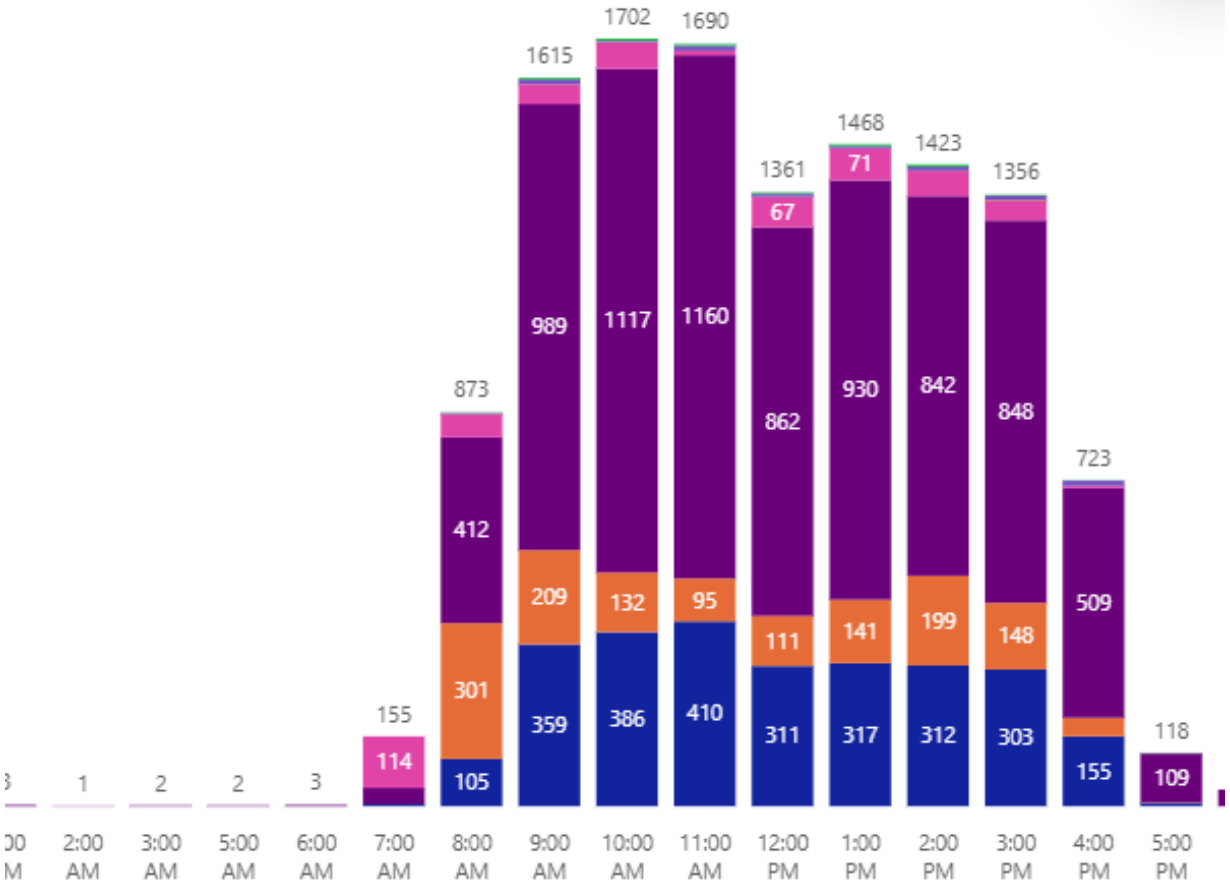
Daily, weekly and monthly activity

Talk time and after-call time

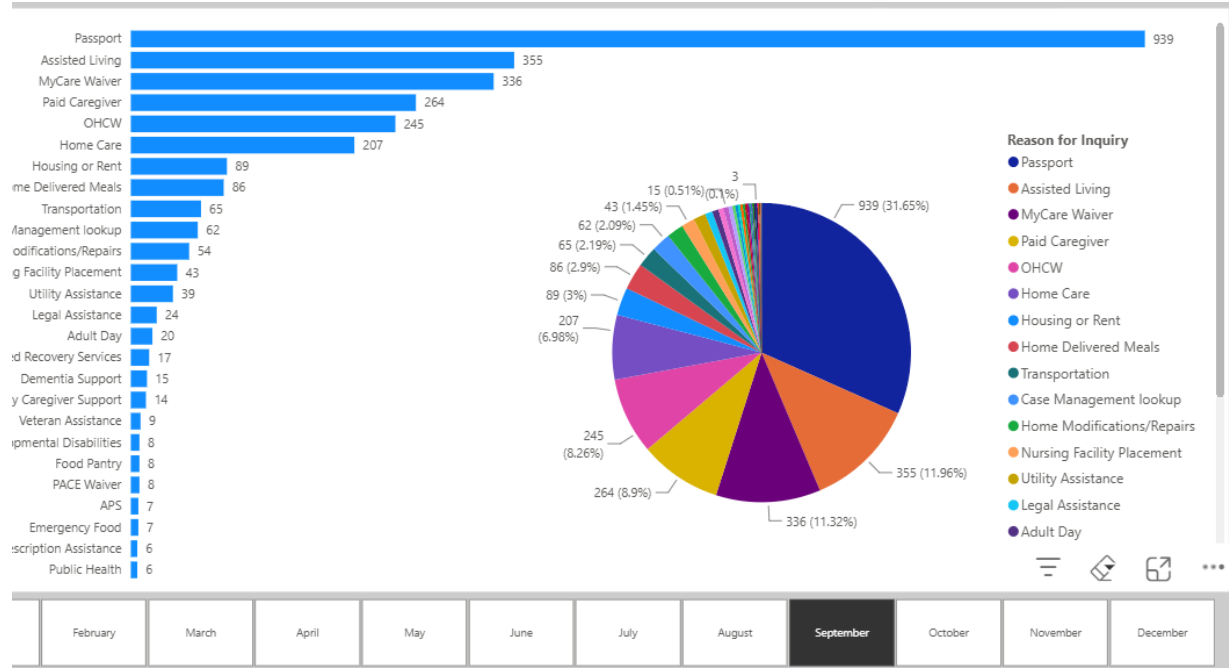
Reasons for calls and outcomes

Times when staff are most productive

lysis: Five9 Calls by Hour



Bridgett Dorman	Desiree Billingsley	Donyele Benton	Hannah Becker	Julie Hernandez	Kayla Mosley	Latashia Cole	Michel Grimn
Crystal Garrett	Dollea Anthory	Gayle Lee	Joi Lloyd	Kathy Harris	Kelley Walsh-Clarett	Michelle Bolton	Regin Bitterm

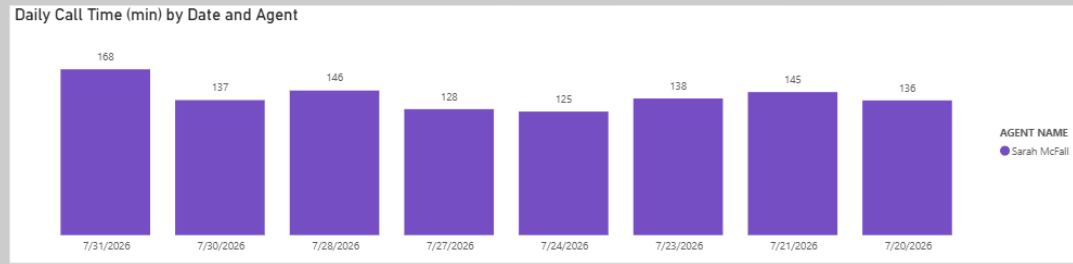


February	March	April	May	June	July	August	September	October	November	December

ADRC Analysis: Five9 Daily Call Time

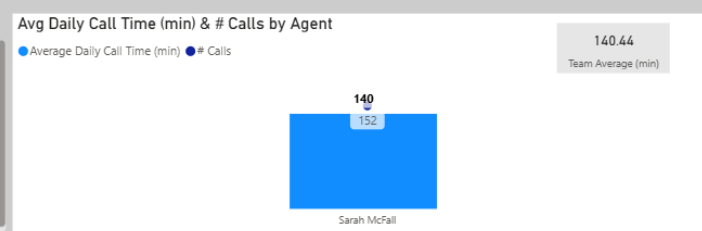
< 300 Minutes | 2024 | 2025 | 2026 | 152 # Calls

Regina Bitterman
Sam Mulder
Sarah McFall
Shantelle Paul
Shatoya Gant
Tonya Hall
Trinetta Phillips
Vanessa Lugo
Yolanda Lowe



Daily Data by Agent

Call Date	AGENT NAME	# Calls	Daily Call Time (min)	Daily Call Time (sec)
7/31/2026	Sarah McFall	12	167.93	10076
7/30/2026	Sarah McFall	19	136.75	8205
7/28/2026	Sarah McFall	17	146.43	8786
7/27/2026	Sarah McFall	16	127.58	7655
7/24/2026	Sarah McFall	23	125.15	7509
7/23/2026	Sarah McFall	27	138.40	8304
7/21/2026	Sarah McFall	21	144.87	8692
7/20/2026	Sarah McFall	17	136.43	8186



PASSPORT Provider Listing

Data Current as of 08/13/2026

DBA / Facility Name	Counties Served	Code
Beachwood Ops, LLC	Cuyahoga	740 750
Bickford of Rocky River	Cuyahoga	740 75
Daughters of Miriam Center for Nursing & Rehabilitation	Cuyahoga	7
Deer Creek Lodge (Previously known as 'The Hebrew Home at Beachwood LLC)	Cuyahoga	
Rockport Retirement Community	Cuyahoga	
Rocky River AL / MC	Cuyahoga	
Villas at King David Center LLC (Previously Known as Stone Gardens)	Cuyahoga	

Clerical Lookup: Active Memb

12099
DB Records Displayed

Program

AL | Anthem | Buckeye | CareSource | Molina | PAS

Member Status

Facility Placement

Member

DB Program	Medicaid	Last Name	First Name	DOB	Member S
Anthem			Carol	7/10/1961	Member
Anthem			Pamela	10/7/1965	Member
Anthem			Patricia	12/12/1955	Member
Anthem			George	9/7/1960	Member
Anthem			Leo	12/11/1957	Member
Anthem			Louise	8/8/1958	Member
Anthem			Maria	9/14/1941	Member
Anthem			Tsillya	4/9/1940	Member
Anthem			NICHOLAS	8/1/1948	Member
Anthem			Steven	2/4/1961	Member
Anthem			Elizabeth	12/21/1960	Member
Anthem			Diane	11/20/1956	Member
Anthem			Michael	11/30/1960	Member
Anthem			Rabha	1/5/1948	Member
Anthem			PIETRO	6/28/1960	Member
Anthem			Nancy	4/8/1934	Member
Anthem			Karen	2/25/1955	Member
Anthem			Nedjelka	8/8/1949	Member
Anthem			RUKMINA	9/7/1957	Member
Anthem			Faith	7/1/1955	Member
Anthem			RAI	11/30/1954	Member
Anthem			Bhim Maya	10/17/1936	Member
Anthem			Man	1/1/1959	Member
Anthem			Dhana	1/1/1945	Mem
Anthem			Duka	1/1/1947	M
Anthem			Devi	1/1/1951	
Anthem			San	1/1/1949	
Anthem			MAYA MAN	6/1/	
Anthem	110064413599	MAGAR	MAN BIR		
Anthem	110285911199	BHUIEL	BIRKHA		

BI: Pre-enrollment and Related Data

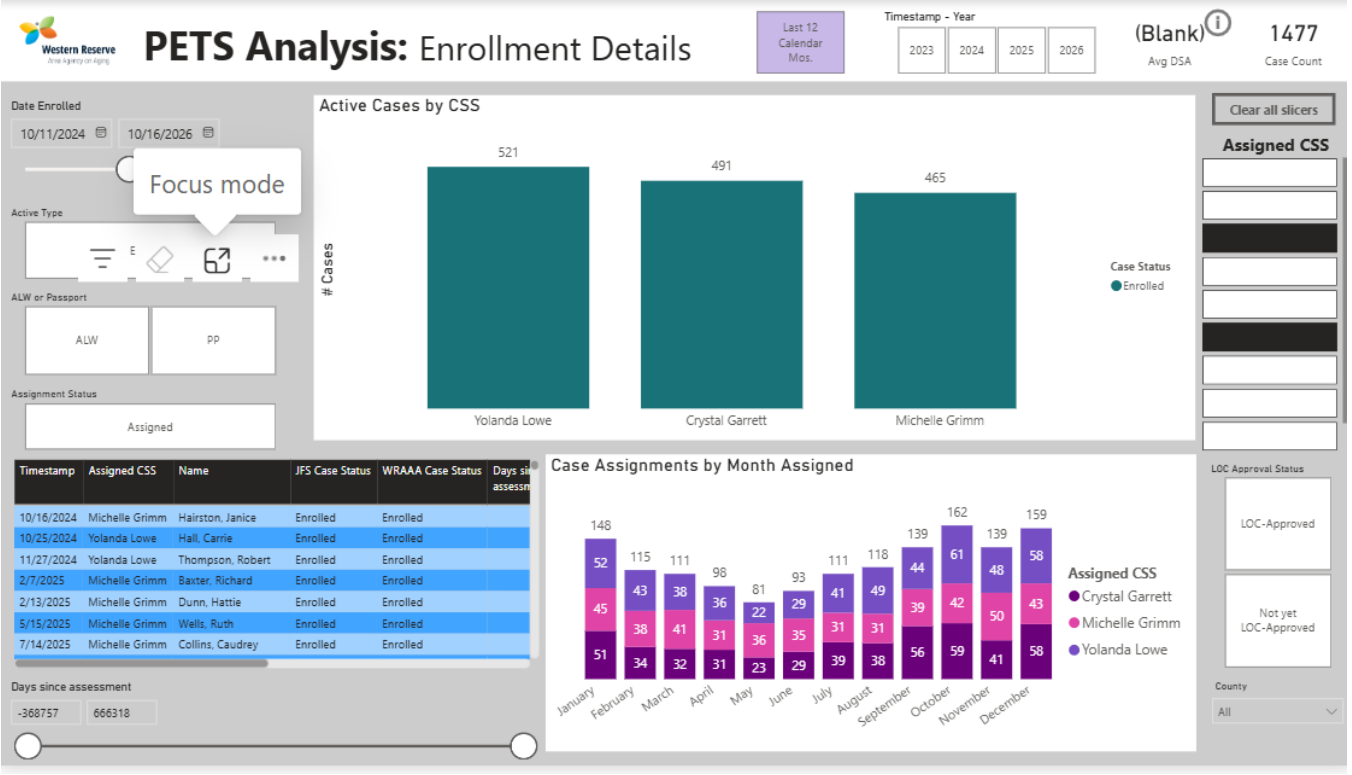
Reporting priorities for pending work and service coordination

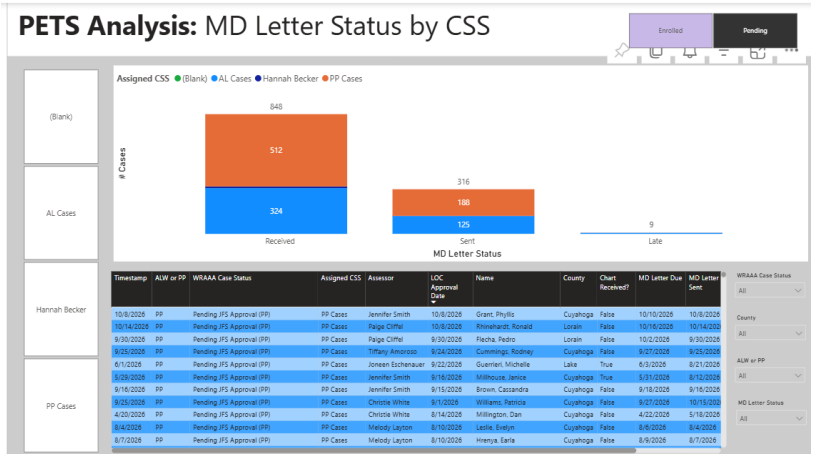
Pre-enrollment follow-up

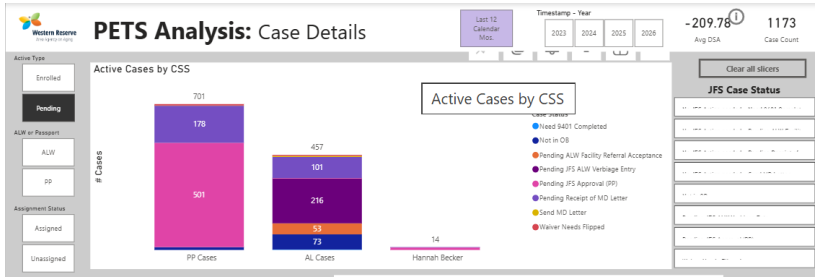
- Pending cases by program and reason
- 30-day calls due or overdue
- Cases marked “Needs MD”

Related reporting

- Provider database
- Find WSC, CC and CM, with upstream reporting
- Satisfaction surveys and QI


Western Reserve
PETS Analysis: Enrollment Details
Last 12 Calendar Mos.
Timestamp - Year
2023
2024
2025
2026
(Blank)
Avg DSA
1477
Case Count
Date Enrolled
10/11/2024
10/16/2026
Focus mode
Active Type
ALW or Passport
ALW
PP
Assignment Status
Assigned
Active Cases by CSS
Cases
521
491
465
Yolanda Lowe
Crystal Garrett
Michelle Grimm
Case Status
Enrolled
Clear all slicers
Assigned CSS
Timestamp
Assigned CSS
Name
JFS Case Status
WRAAA Case Status
10/16/2024 Michelle Grimm Hairston, Janice Enrolled Enrolled
10/25/2024 Yolanda Lowe Hall, Carrie Enrolled Enrolled
11/27/2024 Yolanda Lowe Thompson, Robert Enrolled Enrolled
2/7/2025 Michelle Grimm Baxter, Richard Enrolled Enrolled
2/13/2025 Michelle Grimm Dunn, Hattie Enrolled Enrolled
5/15/2025 Michelle Grimm Wells, Ruth Enrolled Enrolled
7/14/2025 Michelle Grimm Collins, Caudrey Enrolled Enrolled
Days since assessment
-368757
666318
Case Assignments by Month Assigned
148
115
111
98
81
93
111
118
139
162
139
159
January
February
March
April
May
June
July
August
September
October
November
December
Assigned CSS
Crystal Garrett
Michelle Grimm
Yolanda Lowe
LOC Approval Status
LOC-Approved
Not yet LOC-Approved
County
All


PETS Analysis: MD Letter Status by CSS
Enrolled
Pending
Assigned CSS
(Blank)
AL Cases
Hannah Becker
PP Cases
Cases
848
512
324
316
188
125
9
Received
Sent
Late
MD Letter Status


Western Reserve
PETS Analysis: Case Details
Last 12 Calendar Mos.
Timestamp - Year
2023
2024
2025
2026
-209.78
Avg DSA
1173
Case Count
Active Type
Enrolled
Pending
ALW or Passport
ALW
PP
Assignment Status
Assigned
Unassigned
Active Cases by CSS
Cases
701
178
501
457
101
216
53
73
14
PP Cases
AL Cases
Hannah Becker
Active Cases by CSS
Clear all slicers
JFS Case Status

Future Vision

Focus on current strengths & blended funding models

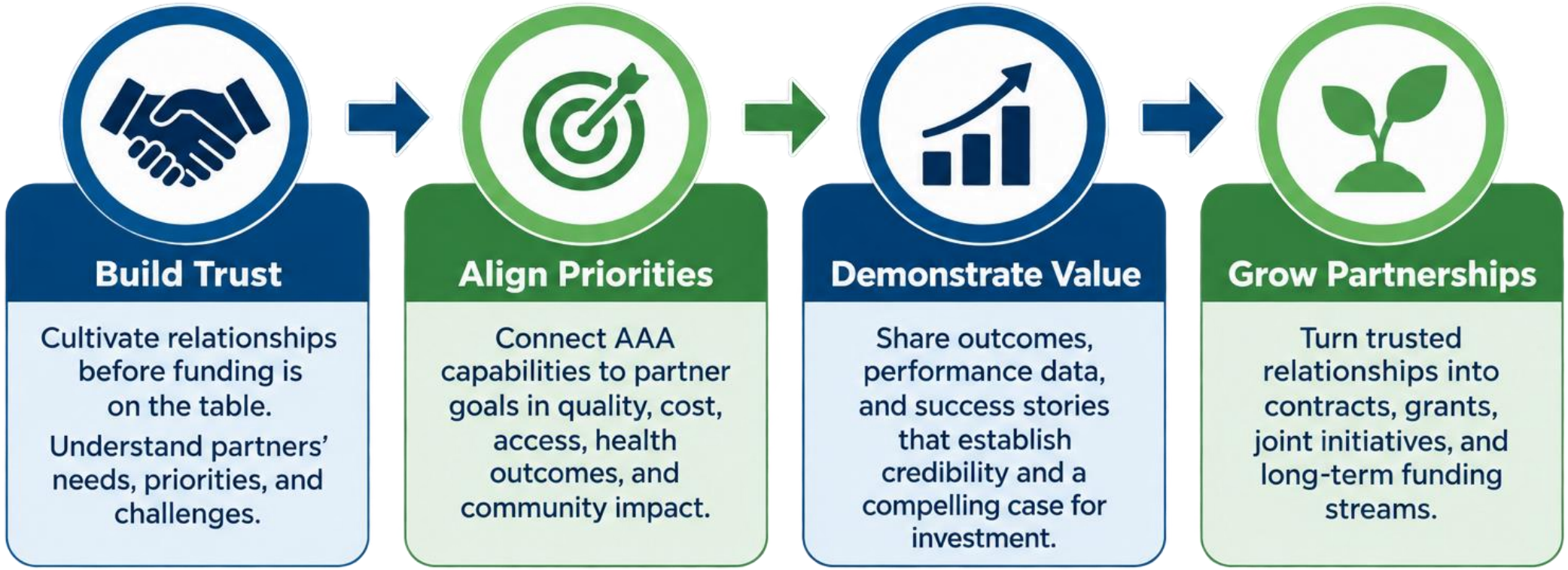
Continued success requires additional approaches

Funding not keeping up with demand

ADRCs depend on 68-100% of funding from ODM

Relationships Create Funding Opportunities

Strong partnerships turn the AAA mission into shared priorities, measurable value, and sustainable funding.



WHO SHOULD BE AT THE TABLE?

- Health Plans
- Hospitals and Health Systems
- Medicaid Agencies
- Foundations
- Employers
- Community Organizations
- Local Government

Relationships open doors. Results build confidence. Partnerships create sustainability.

Opportunities

SDoH Accelerator Program & Assessment Tool

- Demonstrated engagement, impact & data
- MyCare VBS initiatives
- Ongoing meetings & discussions
  - Flu Vaccines
  - Medication Adherence
  - Chronic Disease Management (Diabetes and Hypertension)
  - Asthma
  - OAHP CHW Pilot Grant Award & new opportunities with plans
  - CRCP Grant Submission

Health @ Home – Hospital Engagement

- What do hospital partners care about?

- ADRC is the front door to impacting those priorities
  - Standard work
  - Outcomes

- Screening, assessment & navigation under Medicare care coordination codes
  - Example: Community Health Integration (CHI)

High-Level Comparison

Information Category	Medicare CHI	OBLTSS Screen	AAA Long-Term Care Consultation
Demographics	✓	✓	✓
Contact information	✓	✓	✓
Medical condition affecting care	✓ Required	Limited	Often discussed
Practitioner treatment plan	✓ Required	No	No
ADLs/IADLs	Sometimes	✓	✓ Detailed
Caregiver assessment	✓	Limited	✓
Transportation barriers	✓	✓	✓
Food insecurity	✓	✓	✓
Housing concerns	✓	✓	✓
Home safety/fall risk	✓	Limited	✓ Detailed
Social isolation	✓	✓	✓
Financial barriers	✓	Often	✓
Benefits analysis	Not required	Limited	✓
LTSS options counseling	Not required	Limited	✓
Person-centered goals	✓	Limited	✓
Resource referrals	✓	✓	✓
Ongoing follow-up tracking	✓ Monthly	No	Often
Medicare billing documentation	✓ Required	No	No

If Viewed Through a CHI Lens

For Medicare CHI purposes, a support navigation note would ideally capture:

AAA Navigation Documentation	Useful for CHI?
Transportation barriers	Yes
Food insecurity	Yes
Housing concerns	Yes
Utility concerns	Yes
Caregiver strain	Yes
Social isolation	Yes
Home safety concerns	Yes
Medication-access barriers	Yes
Resource referrals	Yes
Consumer response	Yes
Follow-up activities	Yes
Time spent	Yes
Practitioner treatment plan linkage	Usually missing
Medical necessity statement	Usually missing

Discussion & Questions

What are the efficiencies needed in your ADRC?

What are the opportunities you see in your ADRC?

What do you want to hear more about?