



# Adult Protective Services and Reporter Communication Recommendations for Improving Practice

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*Adult Protective Services and Reporter Communication: Recommendations for Improving Practice*

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## Preface

“I called APS, and they didn’t do anything.”

Adult Protective Services (APS) caseworkers are likely to be familiar with this sentiment. It might come from a family member who has called APS out of concern for his mother’s hoarding behavior, but then perceives no improvements to her living conditions. It might come from an Emergency Medical Technician who files a report of suspected elder mistreatment but is uncertain if the patient ever receives the help they need. When reporters of elder mistreatment do not see the tangible outcomes they expect, they may conclude that APS took little to no action to address the issue. This can lead reporters to feel discouraged from reporting cases in the future, leaving older adults experiencing mistreatment vulnerable to further harm.

Feedback from APS to reporters on the reports they make can help to dispel these types of misconceptions. However, APS faces several barriers to providing feedback to reporters. Concern for the client’s safety and privacy needs to be considered before sharing any information with a reporter. A shortage of staff or time makes it difficult to maintain communication with reporters throughout the investigation. Even contacting the reporter can be a challenge, particularly if the reporter works during the hours APS offices are closed. Significantly, confidentiality laws dictate the information APS can and cannot share, and with whom they can share it.

Through our research, we uncovered strategies that improve the surveillance of reporting while still honoring client privacy and confidentiality. These strategies will foster a team-based approach to the reporting process and allow APS and reporters to work more collaboratively to improve the lives of older adults.

## Table of Contents

Preface.....	3
Background.....	5
Definitions.....	5
Understanding Current Policy and Practice.....	8
Organizing Framework.....	8
Benefits and Risks to Providing Feedback.....	8
Reporter Type and Relationship to the Client.....	8
Decision-Making Model: Providing Feedback to Reporters.....	9
Recommended Strategies for Communicating with Reporters.....	11
Intake and Screening.....	11
Case Investigation.....	13
Case Closure.....	16
Other Recommendations: Public Awareness, Training, and Workshops.....	18
Increasing Public Awareness.....	18
Training Reporters.....	18
APS Workshops.....	19
Reference.....	20
Appendix A: What APS Can and Cannot Do.....	21
Appendix B: Guide for Conducting APS Workshops.....	22

## Background

These recommendations were informed by a two-year research project, beginning with a nationwide environmental scan of policies and practices related to APS and reporter communication. This involved reviewing publicly available information, conducting a secondary analysis of data from focus groups with emergency medical services providers and APS staff, and conducting 32 individual interviews with 44 state APS leaders. Secondly, we conducted an in-depth case study in Massachusetts to assess APS caseworkers' and reporters' perceptions of 2017 policy changes that address this issue. The case study included a review of administrative data to describe trends in reporting before, during, and following the implementation of revised policies as well as a series of interviews and focus groups with 16 APS agency staff members and 14 mandated reporters.

Using our findings, we developed a set of recommendations for strategies that policymakers and key stakeholders at the state and local levels can use to improve communication between APS and reporters. It is important to note that policies, laws, and regulations vary widely among states and jurisdictions, and there may be barriers to wholly adopting these recommendations in different agencies. For example, confidentiality laws can make sharing information with reporters challenging. However, there may be exceptions to these laws that do allow APS to share necessary information with mandated reporters when it is in the interest of the client's safety. APS agencies are encouraged to review the specific laws and regulations in their state or jurisdiction to fully understand the restrictions and exceptions to sharing information with reporters.

## Definitions

**Reporter:** An individual who reports suspicion of elder mistreatment or neglect to APS through a reporting hotline, online reporting system, a written form, or other available means. Some states may refer to a reporter as a "referent," or use other terminology. Generally, reporters are considered "mandated" or "non-mandated." Mandated reporters are individuals (and in some cases, financial institutions) who are legally required to report any suspicion of elder mistreatment or neglect to the relevant authorities. Mandated reporting laws vary widely across states. In some areas, everyone in the state is legally obligated to report.

**Client:** An individual undergoing an APS investigation following a report of suspected mistreatment. Some APS agencies refer to clients as "involved adults" or "vulnerable adults," or use other terminology. The eligibility criteria for APS services varies by state. Some APS agencies serve only older adults (age 60+ or 65+), but almost all serve older adults as well as

younger adults (age 18+) with disabilities. In 15 states, APS serves older adults with or without disabilities<sup>1</sup>.

**Feedback:** Information APS provides to the reporter after the report is made. This includes verbal and/or written communication that informs the reporter about the reporting process, addresses concerns, and/or provides relevant information about the report made. In this research, we found that the feedback APS currently provides to reporters falls primarily into two categories:

- **Procedural feedback** provides information about the reporting and response process. It focuses on the general APS procedures related to receiving, screening, and investigating reports. One example of procedural feedback is notification of the status of a report. APS might call, email, or send a letter to a reporter to notify them that their report was received, their report is under review, the case will be investigated, or the case will not be investigated. This type of feedback typically occurs at intake and during the investigation process.
- **Substantive feedback** focuses on the outcome of the investigation. It goes beyond the process of receiving, screening, and investigating a report to include specific information on the outcome of the case. For example, APS may notify the reporter that their allegation was substantiated<sup>i</sup> or not, the victim<sup>ii</sup> was referred to additional services, or the case was closed. This type of feedback typically occurs after an investigation is complete, when client services are arranged, and/or at case closure.

#### Reporting and response pathway:

- **Intake** refers to the point in the reporting process when APS receives a report and subsequently screens it in or out for investigation. Most feedback to reporters occurs at intake, and typically focuses on process. At this stage, feedback to reporters might include acknowledgement that their report was received, the screening decision, a case ID number, and/or contact information for the assigned caseworker.

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<sup>i</sup> The Administration for Community Living's *Adult Maltreatment Report/2021* specifies that an allegation of mistreatment is considered "substantiated" if it "is supported under state law and policy." An allegation is considered "unsubstantiated" if it "is not supported under state law and policy." An allegation is considered "inconclusive" if "there is insufficient information to either support or not support the allegation of maltreatment, but there is a reason to suspect maltreatment."<sup>1</sup>

<sup>ii</sup> A client who has received one or more substantiated allegations is identified as a "victim" in the National Adult Maltreatment Reporting System (NAMRS).<sup>1</sup>

- **Investigation** occurs after APS has screened in a case and a caseworker begins to investigate the claims. The APS caseworker assigned to the case may or may not be required to contact the reporter, although many states indicate that they often do contact reporter to validate the report and obtain additional information to assist the investigation. At this point, APS typically asks reporters for clarification of details or updates on the allegations. If a reporter is directly involved in the situation being investigated, their role may shift from reporter to collateral contact. Collateral contacts are often privy to more substantive feedback than typical reporters at the investigation phase. Additionally, APS may have ongoing conversations with collateral contacts to facilitate client service plan implementation and engagement with community partners for services at the conclusion of the investigation.
- **Case closure** is when APS completes the investigation and closes the case. Reporters are least likely to receive feedback at this stage. Only a small number of states send a letter to reporters containing the results of the investigation or case outcome (e.g., allegations were substantiated, unsubstantiated, or inconclusive). In some instances, this letter includes a list of services offered to, or recommended for, the client.

Figure 1 below illustrates the journey of an APS report, beginning with initial intake and ending with case closure.

**Figure 1: Reporting and Response Pathway**



# Understanding Current Policy and Practice

## Organizing Framework

### Benefits and Risks to Providing Feedback

Our research focused on APS policies and practices for sharing information with reporters. A key finding was that, in addition to state policies, caseworker discretion plays a significant role in whether and how information about individual cases is shared with different types of reporters. In making these decisions, the potential benefits to the client and to the APS process are weighed against the potential risks to the client and to the APS agency.

Potential *benefits* to clients and APS include:

- Opportunities to acknowledge reports made and strengthen relationships between APS and reporters
- Access to additional information about cases that can aid in the investigations, increase service acceptance, and improve case outcomes
- Opportunities to educate reporters on criteria for case acceptance, actions APS can and cannot take (see Appendix A), and the overall reporting process, which can help strengthen future reports
- Fewer call-backs from reporters, leading to increased staff time and resources to devote to serving clients

Potential *risks* to clients and APS include:

- Breaches of confidentiality laws and clients' privacy
- Backlash from clients or involved individuals to APS about information shared
- Clients' loss of trust in APS
- Strains on staff time and already limited resources

### Reporter Type and Relationship to the Client

Two key factors tend to influence whether, what type of, and how information is shared:

- 1) The **type of reporter** (professional vs. non-professional). In some states, this aligns with mandated and non-mandated status.
- 2) The **quality of the relationship between the reporter and the client**. A reporter may only be briefly involved with the client, or they may have an ongoing relationship with the client in ways that can assist the investigation and/or help improve client safety.

In assessing the risks of providing information to reporters, professionals are typically considered to pose a lower risk than non-professionals. Professionals, such as health care providers, social workers, and first responders, are more likely to adhere to confidentiality and privacy requirements similar to those of APS. Because non-professionals, such as family members and neighbors, are not required to adhere to privacy and confidentiality guidelines, there is a higher risk that they will use information from APS in counterproductive or even malicious ways.

Reporters who have an ongoing relationship with the client are closely involved in the client's care. Their connection to the client is often a valuable resource for APS during investigation, and these reporters can help APS build trust with the client, improving service acceptance. Reporters with only brief involvement in the client's life are unable to provide continued support to the client or APS. Therefore, the potential benefits to the client and APS of providing information to reporters with an ongoing relationship with the client are stronger compared to the potential benefits of providing information to reporters who have only had brief involvement with the client.

## Decision-Making Model: Providing Feedback to Reporters

Based on our research, we have identified four broad categories of reporters:

- **Non-professionals with brief involvement** are the least likely to receive any feedback from APS (substantive or procedural). This group can include neighbors, friends, and the general public. They may be mandated or non-mandated reporters, depending on the state's statute, but importantly, they are only briefly involved. The risks associated with providing feedback to this group of reporters are higher and the benefits are weaker compared to other groups of reporters.
- **Professionals with brief involvement** may receive procedural feedback but are unlikely to receive substantive feedback from APS. This group can include physicians, first responders, and other service providers, and are often mandated reporters. Though professionals, they are only briefly involved. Although the risks of sharing information with this group of reporters are lower compared to non-professionals with brief involvement, the direct benefits to the client are minimal. Importantly, however, this group of reporters plays a crucial role in elder mistreatment surveillance, and there are benefits to providing some level of feedback to reinforce this role.
- **Non-professionals with ongoing involvement** are likely to receive feedback from APS, particularly during the investigation phase. These reporters are often family and friends who are continuously involved in the care of the client. Because of their long-term

involvement, there are likely some benefits to sharing information with them during the investigation. The benefits of providing feedback to this group of reporters are stronger than compared to professionals and non-professionals who are only briefly involved. However, the associated risks are higher compared to involved professionals because non-professionals generally do not have to comply with confidentiality laws or regulations.

- Professionals with ongoing involvement** are the most likely to receive feedback from APS. This group can include primary care providers, social workers, and other service providers, and are often mandated reporters. Because of their profession and their ongoing relationship with client, the benefits of providing feedback to this group of reporters are stronger and the risks are lower compared to other groups of reporters.

The simple two-by-two table (Figure 2) below offers a decision-making model that can help APS agencies determine when they should or should not provide feedback to reporters. The model illustrates how the type of reporter and the quality of their relationship with the client align with the risks and benefits to sharing information with reporters. Overall, APS is more likely to share substantive information with reporters when the perceived risk to client and APS is low and the perceived benefits are strong.

**Figure 2: Decision-Making Model for APS on Providing Feedback to Reporters**



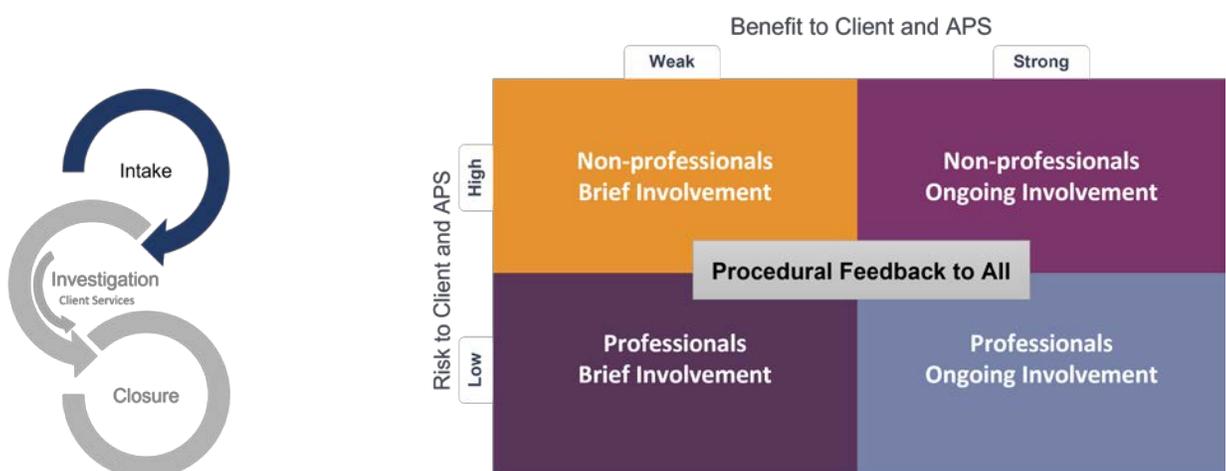
The *Decision-Making Model for APS on Providing Feedback to Reporters* serves as an organizing framework and will be referenced throughout this document.

## Recommended Strategies for Communicating with Reporters

Although effective communication between APS and reporters is a critical element in ensuring the health and safety of vulnerable adults, few states' APS regulations include a standardized approach to providing feedback to reporters. Furthermore, as we have just described, determining when and how to provide feedback is a complex process. To help bridge this gap, we developed a set of recommendations for APS that outline when clients and APS are most likely to benefit from provision of feedback to reporters, and whether the feedback should be procedural, substantive, or both.

These recommendations are organized by the specific stage in the reporting process in which they should be implemented (intake and screening, case investigation, or case closure), the type of feedback APS should provide (procedural, substantive, or case-by-case determination), and the type of reporter who should receive the feedback (non-professionals with brief involvement, non-professionals with ongoing involvement, professionals with brief involvement, or professionals with ongoing involvement). Each recommendation describes the goals for sharing the feedback, the information to include in the feedback, and examples for how APS can implement the recommended strategy.

### Intake and Screening



At intake and screening, feedback to all types of reporters should be procedural. The reporter should be informed about whether the report they made was appropriate for APS and whether it was screened in for investigation or screened out. Automating feedback to reporters is recommended so that feedback can be provided consistently without added burden to intake staff.

<b>RECOMMENDATION: Procedural Feedback to All Reporters</b>
<p><b>Goals:</b></p> <ul style="list-style-type: none"> <li>• To acknowledge the report was received</li> <li>• To convey to reporter that they have fulfilled an important role by reporting their concerns</li> </ul>
<p><b>Feedback:</b></p> <ul style="list-style-type: none"> <li>• Notification that the report was received</li> <li>• Generic information about what typically occurs during the screening process, why a case may be screened in or out, and what the reporter can expect next</li> <li>• Contact information for the local agency or specific person who can provide updated information about the case and answer questions</li> </ul>
<p><b>Implementation Example:</b></p> <ul style="list-style-type: none"> <li>• APS calls or sends a letter, automated text message, or email to the reporter to thank them for the report and their concern, and informs them that the case was screened in or out (if possible), and whether APS needs additional information to determine eligibility</li> <li>• APS records a voice message for the intake line that reporters will hear when they call the agency. The message conveys relevant information about APS and what to expect after reporting.</li> <li>• For screened out reports, APS calls or sends a letter, automated text message, or email to the reporter to thank them for the report and their concern. The message may cite the state code that establishes APS authority to initiate an investigation; inform the reporter that the report does not meet validity criteria, but that they can contact APS with concerns or for more information; and refers the reporter to a different service, if applicable.</li> </ul>

## Case Investigation



Recommendations for the type of feedback to provide during investigation vary by type of reporter and their relationship with the client.

RECOMMENDATION: Procedural Feedback to Reporters with Brief Involvement
<p><b>Goals:</b></p> <ul style="list-style-type: none"> <li>To inform the reporter that the report they made is actively being investigated</li> <li>To inform the reporter of what they can reasonably expect from APS</li> </ul>
<p><b>Feedback:</b></p> <ul style="list-style-type: none"> <li>Notification that the report is under investigation</li> <li>Generic information about what typically occurs during the investigation, examples of what APS can and cannot do, and what the reporter can expect next</li> <li>Contact information for the local agency or specific person who can provide updated information about the case and answer questions</li> </ul>

**Implementation Example:**

- APS calls or sends a letter, automated text message, or email to the reporter to thank them for the report and to inform them that the case has been opened for investigation and assigned to a specific caseworker, and what they can expect to happen next.

**RECOMMENDATION: Case-by-Case Determination of Feedback to Reporters Who Are Non-Professionals with Ongoing Involvement**

**Goals:**

- To inform reporter that the report they made is actively being investigated
- To ensure that APS obtains all relevant information for the investigation to determine appropriate action

**Feedback:**

- Must be determined on a case-by-case basis to avoid providing substantive feedback that could be used inappropriately or maliciously
- Substantive information should only be shared when the investigator is confident that the potential benefits of providing information outweigh the potential risks

**Implementation Examples:**

- APS approaches the reporter cautiously, and asks questions that both allow the reporter to feel acknowledged and understood, as well as assist in APS's determination of the level of safety and utility of sharing further information
- New APS staff members undergo training on circumstances under which they should or should not share feedback with a reporter, and how to recognize signs that a reporter may have ill intent.
- APS supervisors are available to provide guidance and support to caseworkers as they work through difficult cases.
- APS leverages the expertise of professionals on a Multidisciplinary Team to assist them through navigation of a complicated case.
- The agency's legal team assesses the specific circumstances and advises APS on whether or not to share information with the reporter.
- APS asks the client if there is someone they would like APS to contact and involve in the case.

**RECOMMENDATION: Substantive Feedback to Reporters Who Are Professionals with Ongoing Involvement**

**Goals:**

- To inform reporter that the report they made is actively being investigated
- To establish an open line of communication with the reporter
- To ensure that APS obtains all relevant information for the investigation to determine appropriate action
- To provide guidance to reporter on how they can help the client stay safe

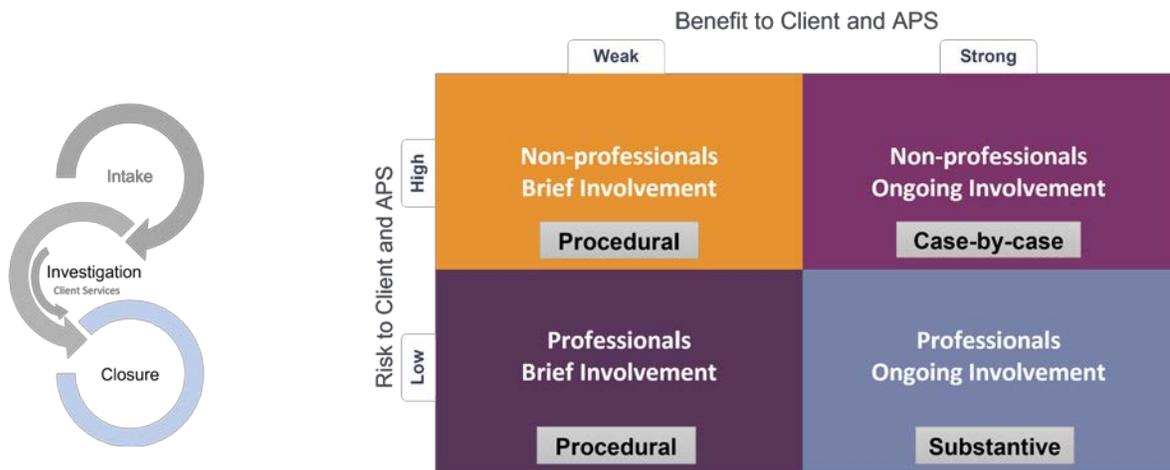
**Feedback:**

- Typically provided via phone
- Notification that the report is under investigation
- Periodic notifications on the progress of the investigation
- Guidance on how the reporter can best help the client and aid in the investigation

**Implementation Examples:**

- APS calls the reporter to inform them that the case is under investigation and to seek additional information, clarification, or updates on the client or allegations.
- Investigator chooses to share their direct contact information with the reporter to maintain an open line of communication.
- APS works collaboratively with the reporter to identify and/or implement appropriate services for the client.
- APS asks the client if there is someone they would like APS to contact and involve in the case.

## Case Closure



Recommendations for the type of feedback to provide at case closure vary by type of reporter and their relationship with the client.

RECOMMENDATION: Procedural Feedback to Reporters with Brief Involvement
<p><b>Goals:</b></p> <ul style="list-style-type: none"> <li>To inform reporter that APS is no longer actively working on the case</li> <li>To advise the reporter to continue to look for signs of mistreatment and report any new concerns to APS</li> </ul>
<p><b>Feedback:</b></p> <ul style="list-style-type: none"> <li>Notification that the case has been closed</li> <li>Generic information about how and why cases are closed, including examples of what APS can and cannot do, and what the reporter can expect next</li> <li>Contact information for the local agency or specific person who can answer questions</li> </ul>
<p><b>Implementation Example:</b></p> <ul style="list-style-type: none"> <li>APS calls or sends a letter, automated text message, or email to the reporter to thank them for the report and their concern, and informs them that the case has been closed.</li> </ul>

<b>RECOMMENDATION: Case-by-Case Determination of Feedback to Reporters Who Are Non-Professionals with Ongoing Involvement</b>
<p><b>Goals:</b></p> <ul style="list-style-type: none"> <li>To inform reporter that APS is no longer actively working on the case</li> </ul>
<p><b>Feedback:</b></p> <ul style="list-style-type: none"> <li>Must be determined on a case-by-case basis to avoid providing substantive feedback that could be used inappropriately or maliciously</li> <li>Substantive information should only be shared when the investigator is confident that the potential benefits of providing information outweigh the potential risks</li> </ul>
<p><b>Implementation Examples:</b></p> <ul style="list-style-type: none"> <li>The agency’s legal team assesses the specific circumstances and advises APS on whether or not to share information with the reporter.</li> <li>APS asks the client if there is someone they should contact to help with service planning</li> </ul>

<b>RECOMMENDATION: Substantive Feedback to Reporters Who Are Professionals with Ongoing Involvement</b>
<p><b>Goal:</b></p> <ul style="list-style-type: none"> <li>To inform reporter that APS is no longer actively working on the case</li> <li>To inform reporter of the outcome of the case</li> <li>To provide guidance to reporter on how they can help the client stay safe</li> </ul>
<p><b>Feedback:</b></p> <ul style="list-style-type: none"> <li>Notification of the outcome of the case (substantiated, unsubstantiated, inconclusive)</li> <li>List of services offered to or accepted by client</li> <li>Guidance on how the reporter can help to keep the client safe</li> </ul>

**Implementation Example:**

- APS calls or sends a letter, automated text message, or email to the reporter to inform them of the outcome of the case (substantiated, unsubstantiated, inconclusive).
- APS works collaboratively with the reporter to ensure appropriate services are in place for the client.

## Other Recommendations: Public Awareness, Training, and Workshops

### Increasing Public Awareness

Another critical step to improving communication between APS and reporters is raising public awareness about the prevalence of elder mistreatment and the role of APS. Community members may not be aware of APS and the services they provide. APS is commonly confused with Child Protective Services, and mistakenly believed to have the authority to forcibly remove an adult from their home or impose upon them services they do not want. Keeping the community informed about the signs and symptoms of elder mistreatment, when and how to make a report to APS, the types of services APS can and cannot provide, and what to expect after making a report will reduce confusion or misconceptions about APS and lead to better reporting and greater protection of vulnerable adults.

Effective methods of spreading public awareness include developing brochures and posters to display in a variety of public venues such as grocery stores, transportation stations, senior centers, healthcare facilities, and other commonly frequented locations. TV, radio, and social media platforms are also extremely useful communication channels that reach a wide audience. Involvement in community events is another way APS can help to ensure that community members know how to get help when they need it.

### Training Reporters

Providing training for mandated reporters on the fundamental role they play in preventing and addressing elder mistreatment is one more way to enhance communication and collaboration between APS and reporters. Training could be delivered in-person or via webinar, and should focus on how reporters can recognize signs of elder mistreatment, how they can submit a report to APS, APS's procedures and reporting requirements, and what they can expect following a report submission. Offering trainings several times a year can ensure that staff are kept updated

on any changes in regulations or within the APS agency, and that any new staff will receive the same education. With a clear understanding of reporters' and APS's roles and responsibilities, reporters can more effectively provide critical information to APS, allowing APS to accurately assess and respond to cases appropriately.

## APS Workshops

As part of our efforts to gain a better understanding of states' current practices and priorities for change, we conducted four workshops with APS staff in Kansas, Oklahoma, Washington, and Utah. Participants were highly engaged in the workshop discussions, and generated many actionable approaches to improving communication practices. We recommend that states interested in improving communication with reporters engage in their own workshops to help plan for and guide changes. In Appendix B, we provide an overview of the structure of the workshops so interested states can replicate or adapt the process.

## Conclusion

Reporters of elder mistreatment are critical to identifying and responding to abuse, neglect and exploitation of older adults. Improving elder mistreatment identification and response depends on timely and effective communication between reporters and APS. Consistent feedback from APS to reporters is a critical strategy for improving relationships between APS and reporters, spreading awareness and improving capacity to report and address elder mistreatment, and improving the quality of the reports received by APS.

These recommendations suggest strategies for APS-reporter communication at different points in pathway from report intake and screening, case investigation and services, to case closure. Strategies include tailoring the type of feedback (procedural, substantive, or case-by-case determination) to the type of reporter (professional or non-professional) and their level of involvement with the client (brief or ongoing). These recommendations also highlight the need for ongoing education for the public, mandated reporters, and APS staff.

## Reference

1. McGee, L. & Urban, K. (2022). Adult Maltreatment Data Report 2021. Submitted to the Administration for Community Living, U.S. Department of Health and Human Services.

## Appendix A: What APS Can and Cannot Do

APS **can** provide, or help obtain:

- Emergency housing
- Referrals for medical assessments
- Temporary medications
- Behavioral health services (e.g., therapy, treatment for substance use disorders)
- Home cleaning and repair services
- Transportation assistance
- Respite and/or long-term care services

APS **cannot**:

- Share information about a case of suspected elder mistreatment (e.g., with reporters) against state confidentiality laws
- Force older adults to do something they do not want to do (e.g., accept services, be placed in a nursing home) without legal standing (e.g., court order).

## Appendix B: Guide for Conducting APS Workshops

### Preparation and Logistics:

1. **Platform: In-person is preferable**

Workshops were held in-person with three states and virtually with one state. Each workshop was beneficial, but the in-person format proved to be more generative.

2. **Participants: Invite diverse group of staff**

It is important to invite staff with expertise in each area of process, from intake to case closure Supervisors should be included, as well as frontline staff from across the state. It is also important to consider demographic diversity. The workshops we conducted were limited by a lack of racial diversity. In hindsight, it would have been beneficial to allocate time during the preparation phase to reflect on each participant list, consider who was missing, and make sincere efforts to include these individuals or groups.

3. **Length: 2-3 hours**

The workshop should allow enough time for participants to introduce themselves and participate in an “icebreaker” activity. This can help to set a positive tone for the meeting and encourage open communication among all participants.

4. **Agenda**

Develop a structured agenda that includes time for a brief presentation to establish the framework for the meeting but devotes most of the time to small and large group work and discussion.

### Workshop Format:

1. Present current research and acknowledge documented concerns, risks, and benefits of providing information to reporters (see Appendix 1).
2. Summarize current state policy on sharing information with reporters but give participants permission to think outside of current confidentiality laws.
3. Brainstorm current practices and priorities that have the potential for change. For instance, question the day-to-day practices of the agency and the ways in which they vary depending on the location or role of the APS staff. Jointly identify strategies that staff use to share information with different types of reporters at each stage of the reporting process and how the process can be improved.

4. Small group discussions may be more engaging for participants. These can be done through breakout groups, preferably with mixed categories of staff. It may be helpful to have a worksheet to guide participants as they think through the types of information they provide to reporters during the reporting process (see Appendix 2).

Determine Top Priorities for Change:

1. What types of information would you like to share that you are not currently?
2. Why are you currently unable to share this information?
3. What policy, practice, or workflow needs to be changed or implemented to facilitate this change?
4. What factors make it possible for you to implement this change?
5. What barriers need to be overcome to implement this change?

## Appendix 1. Perceived Risks and Benefits of APS Providing Feedback to Reporters

**Risks**

- Backlash for APS
- Client loss of trust in APS
- Detrimental to older adult's privacy
- Breach of confidentiality laws
- Strains staff and already limited resources

**Benefits**

- Acknowledges report made
- Reduces unnecessary callback
- Educate reporters, strengthens future reports
- Access additional information to improve case outcomes
- Strengthens relationship between APS and reporters

Appendix 2. APS Workshop Worksheet

STAGE	PROCEDURAL FEEDBACK	SUBSTANTIVE FEEDBACK
<b>INTAKE / SCREENING</b>	<input type="checkbox"/> Professionals, ongoing relationship <input type="checkbox"/> Professionals, brief relationship <input type="checkbox"/> Non-professionals, ongoing relationship <input type="checkbox"/> Non-professionals, brief relationship	<input type="checkbox"/> Professionals, ongoing relationship <input type="checkbox"/> Professionals, brief relationship <input type="checkbox"/> Non-professionals, ongoing relationship <input type="checkbox"/> Non-professionals, brief relationship
<b>INVESTIGATION</b>	<input type="checkbox"/> Professionals, ongoing relationship <input type="checkbox"/> Professionals, brief relationship <input type="checkbox"/> Non-professionals, ongoing relationship <input type="checkbox"/> Non-professionals, brief relationship	<input type="checkbox"/> Professionals, ongoing relationship <input type="checkbox"/> Professionals, brief relationship <input type="checkbox"/> Non-professionals, ongoing relationship <input type="checkbox"/> Non-professionals, brief relationship
<b>CLOSURE</b>	<input type="checkbox"/> Professionals, ongoing relationship <input type="checkbox"/> Professionals, brief relationship <input type="checkbox"/> Non-professionals, ongoing relationship <input type="checkbox"/> Non-professionals, brief relationship	<input type="checkbox"/> Professionals, ongoing relationship <input type="checkbox"/> Professionals, brief relationship <input type="checkbox"/> Non-professionals, ongoing relationship <input type="checkbox"/> Non-professionals, brief relationship

<b>Priority</b> What policy, practice, or workflow needs to be changed or implemented?	<b>Challenges to Implementation</b> What barriers would you need to overcome to operationalize changes to communication?	<b>Opportunities for Implementation</b> What factors make it possible for you to operationalize changes to communication?



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