

Policy Title	Inclusion and Exclusion, Resource documents and database		
Policy #	42	Effective Date	7/2009
Training Required	Orientation and annual review	Revised Date	7/2022
Other	IAA	Review Date	7/2022

**PURPOSE:** Provide clear guidelines as to inclusion/exclusion of resource information

**POLICY:**

ADRC maintains a specialized resource database designed to support older adults, people with disabilities, caregivers and the general public to access up-to-date information about services available in their area. The resource database is a tool that supports the provision of information and assistance services. ADRC reserves the right to make all decisions regarding the inclusion, exclusion and use of information relative to individuals and/or organizations. The Inclusion/Exclusion policy of the Kenosha County ADRC will be made available for public viewing on the Kenosha County ADRC website, and will include a jot form link: <http://form.jotform.co/form/32533557861863> for use by any vendor who wishes to be considered for inclusion to the community resources maintained by the ADRC. Although inclusion/exclusion decisions will, for the most part, be made based upon the perceived needs of the client/users of ADRC, the final determination as to inclusion or exclusion shall be in the sole discretion of ADRC.

**DEFINITIONS: NONE.**

**PROCEDURE:**

**I. Service Area**

- A. ADRC has a specialized resource database of both nonprofit and specific for-profit agencies and organizations that provide services directed to the agency's targeted population (Seniors and persons with disabilities), in Kenosha County. The information obtained from vendors may be used as a resource to the consumers of the ADRC in a variety of ways. The decision as to how best to use this information will be the sole discretion of the ADRC, being mindful to reduce duplication, increase uniformity of the information provided to best facilitate choice, while offering information according to principals of Plain Language, and following approved ADRC style guide.
- B. Agencies and organizations located outside this service area may be considered on an individual basis.
  1. Emphasis will be made to include services not otherwise available in Kenosha County.
  2. Inclusion of services available in surrounding counties that, due to location, is easier for resident access.

**II. Criteria for inclusion and exclusion**

Inclusion Criteria

- A. Nonprofit agencies providing a community service.

- B. Agency/organization will have been in business, in good standing with licensing bureau and/or BBB for minimum of one year.
- C. Government agencies which provide social, education and health services.
- D. Organizations (such as churches, social clubs) which offer a service to the community at large, not just their own members.
- E. For profit organizations that provide a service to ADRC's targeted population, provides a specialized service other than its core function that is not offered by non-profits in our community; is licensed /accredited or a Medicare/Medicaid approved provider, where applicable, has been providing services for one year within Kenosha County, with local office in either Kenosha, Racine or Walworth counties.  
 \*\*This agency holds full discretion in deciding which for-profit organizations will be listed in the database and resources, based on the community needs identified by the ADRC.
- F. Self-help support groups
- G. Elected members of government
- H. Hospitals, health clinics, personal and intermediate care homes, nursing homes. Medical facilities will be included only if they provide a target group specific, specialized function or program. Must provide some specific program/service that is specialized for ADRC's target populations.
- I. Professional organizations (especially those organizations in the social services field).
- J. Advocacy groups.
- K. Community Service Advocacy Organizations.
- L. Propriety agencies offering parallel to a non-profit service to which clients are referred and fees paid by a government agency (for example: priority homemaking agencies).
- M. \*Home health/supportive home care providers/hospice agencies, with a local office within Kenosha, Racine or Walworth Counties), in business no less than 12 months. There may be times when the resource list is exhaustive and there is no need for any additions to be made. At that time, new vendors may be added if met the above criteria and offer a specialized service option; may alternatively be added to a waiting list to be added through attrition.
- N. Apartments for elderly and persons with disabilities.
- O. Community Libraries.

#### Exclusion Criteria

- A. Services available only to members of a certain group or club (i.e. Church parishioners).
- B. Unlicensed service providers, unregistered residential care facility, or room and board.
- C. Illegal services and/or questionable practices; this could also include agencies which deny service on the basis of color, race, sexual orientation, and so forth.
- D. Chore providers that are not bonded and/or do not hold a valid Wisconsin Seller's Permit if providing a service for which sales tax is collected.

#### Removal of individual/organization from resource file database:

ADRC will make final determination as to action of removal of any resource from the database. Service providers will be removed due to any knowledge of discrimination, illegal services, illegal actions by administrators and/or their staff or any questionable practices. Agency and Program records will be removed if attempts to contact vendor for annual updates, results in no response. Agency and Program records will be removed if any of the Inclusion Criteria is no longer met, or any of the Exclusion Criteria is now applicable.

Removal decision will be made/reversed after review by IAA Divisional Supervisor, ADRC Director, and Resource Team and Coordinator.

Removal decision may be reversed by the sole discretion of review committee.

1. Verify that the agency/program meets the above Removal criteria or complaints/concerns or changes in the Inclusion and Exclusion policy.
2. Complete the Information and Resources Updates and Changes form (see attached).
3. Remove the information from the various resources; IRIS, directory, handouts and any brochures associated with the agency/program.
4. Send out email notification to all ADRC staff it is relevant to.
5. If only a program of a specific agency is being removed, print out the IRIS record, delete the program, and note date and staff making the deletion on the program record and attaché purple edit form. File in corresponding agency file.
6. If an entire agency and attached programs are being removed, delete attached programs, delete agency record and pull entire IRIS file, transferring it then to that year's file of removed IRIS agencies. Add it to the Removal list by date. Resource Planning and Tracking tool, Excel "G:\I&A\Resource Tracking and Planning1.xlsx"

Disclaimer: Inclusion does not imply endorsement and omission does not indicate disapproval. Inclusion in the database is a privilege, not a right and an organization may be denied inclusion. An excluded organization may request reconsideration of decision to deny inclusion.

**REFERENCES:** Setting Inclusion/Exclusion Criteria: Determining the Scope of a Resource File, Dick Manikowski, 2000 AIRS Standards.

**ATTACHMENTS: PDF, INCLUSION REQUEST FORM**