



Elder Justice Advocate Project Intake Form: Instructions

Monthly Reporting

DUE: 5th day of the following month e.g. May’s monthly report would be due by June 5th

Monthly reports will include a tally of NEW and ONGOING clients for each month:

- **NEW clients:** clients are considered “new” if an Advocate sees them *for the first time* in the reporting month, **or** if the client is being reopened for a *new* issue or concern. For example: Mrs. Jones is referred in May after her son assaults her and is referred again in August for a stranger scam. Mrs. Jones could be counted as a “new” client in May and in August.
- **ONGOING clients:** clients are considered “ongoing” if they carry over from the month or months prior.

Client Intake Form

DUE: upon case closure. Can be turned in with monthly reports, if easier

This form should be filled out for each client (age 60+ only) served by the Advocate at any point throughout the criminal or civil justice processes. Completed forms should be sent to Lifespan *after a case is closed or the referring situation has been resolved*. Please ensure that the Advocate’s name and contact information is at the top of the sheet so that we may contact him or her with additional questions.

Client Demographics:

- Please note that Lifespan keeps this information safe and confidential. Client names are not required on this form; however, please keep track of personal identifying information for clients within your own files.
- Preferred method of creating ID tags: **name of county + intake date** (ex: Monroe042318). If more than one intake is done on a date, add a letter at the end (ex: Monroe042318a, Monroe042318b).

Service Information:

Service	Check this box if:
Support/guidance through the criminal justice process	The Advocate has provided case management, advocacy, information about the criminal justice process , or other criminal justice related support to a client by phone, in-person, or through e-mail. Example: a 65-year-old client, Richard, is referred to you after he is assaulted by his partner. You explain the process of obtaining an Order of Protection and provide some safety planning.
Court advocacy	The Advocate accompanies a client to court or advocates with the court on behalf of the client (i.e. by sitting with the client through the process, accommodating an earlier start time, assistance with filling out forms, etc). Example: Richard decides that he would like to petition for an Order of Protection. You accompany Richard to court, where he obtains a temporary Order.
Eliminating or reducing barriers	The Advocate has assisted the client in obtaining physical or emotional access to the criminal justice system (i.e. finding reliable transportation, obtaining assistive devices, helping to obtain legal representation for client, etc.). Example: through your work with Richard, he discloses that he has never sought an Order before because he is unaware of his options also fears discrimination. You also learn that he largely depends on his partner for transportation as Richard does not like to drive. You provide guidance and support to Richard, which reduces some of his emotional barriers to seeking an Order. You also locate a reliable, affordable ride service for Richard so that he may attend court appearances. <i>Note: most of the actions that are taken by the Advocate will fit into this category. Please describe in further detail on the second page of the Intake form.</i>

<i>Information and referral</i>	<p>The Advocate provides guidance, referrals, or resource information provided to clients that is not directly related to the criminal justice process (i.e. referrals to Adult Protective Services, information about local resources for older adults and their caregivers).</p> <p>Example: with Richard’s consent, you refer him to a local agency that has LGBTQ+ friendly programming. Richard also identifies that he would like to find a new Primary Care Physician, as he and his partner have been going to the same one, and you provide him with a list of physicians who are taking new patients.</p>
<i>Law Enforcement investigation initiated</i>	<p>The Advocate provides any intervention or advocacy that encourages a more active and meaningful collaboration between the client and law enforcement officers.</p> <p>Example: Richard’s partner does vacate the shared property, but returns without police escort several hours later to collect his personal belongings. While doing so, he also takes some of Richard’s belongings. You assist Richard in contacting the police to inform them of the violation, and explain the necessity of having Richard’s belongings returned to him.</p>
<i>Referral to District Attorney</i>	<p>The Advocate consults with the District Attorney’s Office regarding the client’s case, even if no prosecution ensues. This can be through direct conversations with the DA’s Office or indirectly through conversations with law enforcement officers.</p> <p>Example: as you work with Richard, additional concerns regarding financial exploitation arise. You discuss the case at an E-MDT meeting with the DA’s Office and law enforcement.</p>
<i>Prosecution initiated</i>	<p>A perpetrator is prosecuted for crimes against the client while the client is working with the Advocate or as a direct result of work done with or by the Advocate.</p> <p><i>Note: the Advocate does not need to have directly requested prosecution for this service to be checked.</i></p>
<i>Civil or Criminal conviction</i>	<p>A perpetrator is convicted of a crime in criminal court, or there is a judgment in favor of the client in a civil complaint while the client is working with the Advocate or as a direct result of work done with or by the Advocate.</p> <p><i>Note: the Advocate does not need to have directly requested prosecution or civil remediation for this service to be checked.</i></p>
<i>Order of Protection</i>	<p>The Advocate works with law enforcement and the client to secure a criminal court Order, or advises, accompanies, or otherwise assists the client in obtaining a temporary or permanent Order of Protection in Family Court. Orders may be refrain or stay-away.</p>
<i>Crime Victims Compensation</i>	<p>The Advocate advises the client about the availability of the Crime Victims fund through the Office on Victim Services (OVS), assists in completing an application for claims, or advocates with OVS on behalf of the client.</p> <p><i>Note: the claim does not need to be successful to check off this box.</i></p>
<i>E-MDT review</i>	<p>The Advocate has direct or indirect knowledge that the client’s case (for which the Advocate is involved) has been reviewed by an *Enhanced Multidisciplinary Team (not available in all counties at this time).</p> <p><i>Note: the Advocate does not have to have attended the E-MDT meetings.</i></p>

***Enhanced Multidisciplinary Teams:** *E-MDTs are comprised of professionals from various disciplines whose primary focus is to investigate, intervene, and prevent financial exploitation of older adults. E-MDTs have unique access to a forensic accountant and geriatric psychiatrist in addition to drawing on the expertise of disciplines including aging services, the financial industry, and local legal and law enforcement. The team provides a holistic response which includes recommendations and support to those working on complex cases of financial exploitation.*

Please return monthly reports and client intake forms to:

Tracey Siebert-Konopko, Program Manager

e-mail: tsiebert@lifespan-roch.org | fax: 585-244-9114 (attn: Tracey S-K)

Lifespan | 1900 S. Clinton Ave. | Rochester, NY 14618



Elder Justice Advocate Project Client Information Form

Case Opening Date: _____

Case Closing Date: _____

Advocate Name: _____ Agency: _____

E-mail: _____ Phone: _____

Case ID #: _____ Gender Identity: _____ Age: _____ County: _____

Race/Ethnicity (check all that apply):

- African American/Black
- American Indian/Alaska Native
- Asian
- Hispanic/Latino(a)
- Native Hawaiian/Pacific Islander
- White
- Other: _____

Relationship of Primary Perpetrator to Client:

- Adult child or grandchild
- Current/former spouse or intimate partner
- Other family member(s)
- Stranger
- Other household member (not related)
- Caregiver (paid or unpaid)
- Acquaintance (i.e. neighbor, coworker, employee/er)
- Unknown

Type of Elder Mistreatment (check all that apply)

- Emotional/Psychological
- Financial
- Neglect
- Physical
- Sexual
- Scam/ID Theft
- Crime* (list all that apply): _____

* The accused party does not need to be sentenced; being charged or implicated in a court document will suffice.

Service provision over the course of the case: (check all that apply)

- | | |
|---|--|
| <ul style="list-style-type: none"> <input type="checkbox"/> Support/guidance through the criminal justice process <input type="checkbox"/> Court advocacy (criminal or civil) <input type="checkbox"/> Eliminating/reducing barriers* <input type="checkbox"/> Information and referral <input type="checkbox"/> Law enforcement investigation initiated <input type="checkbox"/> Referral to District Attorney <input type="checkbox"/> Prosecution initiated | <ul style="list-style-type: none"> <input type="checkbox"/> Civil or Criminal conviction <input type="checkbox"/> Order of Protection <ul style="list-style-type: none"> <input type="checkbox"/> Petition initiated <input type="checkbox"/> Order obtained <input type="checkbox"/> Crime Victims Compensation <ul style="list-style-type: none"> <input type="checkbox"/> Claim submitted <input type="checkbox"/> Amount taken (if known): _____ <input type="checkbox"/> Amount received (if applicable): _____ |
|---|--|

*Please describe on back of page

Was this case reviewed by an Enhanced Multidisciplinary Team?

- Yes
- No
- Unsure

Please check off any barriers that you assisted the client to reduce or eliminate:

✓	Barrier	Instruction	✓	Barrier	Instruction
<input type="checkbox"/>	Communication	Use if you assisted the client in obtaining an official translator, interpreter, or any other resource to enhance or enable written, oral, or electronic communication	<input type="checkbox"/>	Medical or Physical	Use this if you assisted the client in coordinating physical access to the court system (i.e. time of day, ADA considerations) or if you assisted in ensuring that they had appropriate medical equipment/medications/considerations while in court
<input type="checkbox"/>	Emotional	Use if you assisted the client by providing emotional support post incident(s). This could include using trauma-informed approaches when working with a client, crisis intervention, safety planning, referring to/providing individual or group counseling. <i>This will be applicable for most clients</i>	<input type="checkbox"/>	Systemic	Use this if you advocated for, or otherwise assisted a client with the criminal justice system process. This could include liaising with law enforcement officers, the District Attorney's office, or court personnel on behalf of the client. Also use if you assisted the client in obtaining legal representation
<input type="checkbox"/>	Transportation	Use this if you assisted the client by providing referrals or other resources to transport the client to necessary court, medical, and community-based programming	<input type="checkbox"/>	Other: _____	Use this sparingly to describe any other services you provided or barriers identified during the case

Briefly explain successes and/or ongoing needs for each barrier checked:

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Tracey Siebert-Konopko, LMSW, Program Manager

*e-mail: tsiebert@lifespanrochester.org | fax: 585-244-9114 (attn: TSK)

Lifespan | 1900 S. Clinton Ave. | Rochester, NY 14618



Elder Justice Advocate Project Client Information Form

Month reporting: _____

DUE: By the 5th day of the following month

Advocate name: _____

Agency: _____

E-mail address: _____

Total NEW clients	<i>Clients seen for the <u>first time</u> in the reporting month, or if the client is being reopened for a <u>new issue or concern</u></i>	_____
Total ONGOING clients	<i>Clients are considered "ongoing" if they carry over from the month or months prior</i>	_____

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