

# National EA MDT TTA Center



## Webinar Summary: Case Finding and Case Tracking

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### Background

E-MDTs meet regularly to discuss complex elder abuse cases that require multiple interventions from agencies represented on the team. It is not possible to accept nor review all the cases that appear on the radar of a particular E-MDT. How should teams choose which cases to review? Is it important to establish a process to vet cases and prepare the person presenting the case to the team? And how should teams handle particularly complicated cases involving victims with very complex needs? The following webinars will answer these questions and more.

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### Case Finding

(recorded June 17, 2021) by Candace Heisler, retired Assistant District Attorney

### Why is this topic important for E-MDTs? How can I apply this information to E-MDT work?

As mentioned above, E-MDTs cannot possibly review every case that comes across the desk of various team members. A process to determine which cases will be brought forward for review (case finding) becomes a vital piece to E-MDT work. A pre-determined process for case review, or a case criteria, allows teams to better maximize the value of various members/agencies present and ensure that referrals are accepted from multiple agencies.

### Take-aways from this presentation

- Take the time to develop **Team Processes**. These processes might include developing and using a case review form to summarize cases for team members, developing an intake process to vet cases, or setting meetings to best address the anticipated case load (Weekly? Monthly? On an emergency basis only?)
- **Case selection criteria can be an obstacle** to case finding. At times, a partner agency may feel they can handle the case themselves without input from the group, or members may have a different definition on what a 'complex' case is.
- **Team membership** affects the kinds of cases that can be reviewed. As cases and circumstances change, it is important to have on-going member recruitment. Be mindful of the group being too heavy on government agencies, as other expertise such as civil legal, medical, cognitive, and forensic accounting professionals can strengthen a case

plan. A diverse team, reflective of the community, ensures that it is meeting the needs of those they serve and offering solutions that consider the cultural context of Elders in the community. Lastly, consider that interpersonal relationships within the team are worth cultivating (does everyone feel their time is well-spent, does everyone get a chance to present cases, is there a power imbalance, are conflicts addressed?).

- **Processes can be revised** to improve case referrals. Sometimes funding dictates what is reviewed. There may be implications of the criteria used: disciplines may have different standards of investigating a case so may not open the case when another discipline would. Does this limit cases that may involve other aspects? Assure criteria does not prevent the team from reviewing the kinds of cases it could. If not handled effectively, this can discourage agencies from referring cases to an E-MDT.

[Link to Power Point](#)

[Link to Recording: Finding Cases](#)

### Resources

[Webinar Handout](#)

[Center for Elder Abuse Solutions, Manhattan MDT \(includes 2 case presentation flow charts\)](#)

[Center for Elder Abuse Solutions, Role of Civil Attorneys on Elder Abuse Multidisciplinary Teams](#)

[US Department of Justice, Elder Justice Initiative, Chapter 8 “Case Reviews”](#)

[US Department of Justice, Elder Justice Initiative, MDT Toolkit, Ground Rules during Team Reviews](#)

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## Wicked Problems: Complexity of Elder Mistreatment

(recorded August 31, 2020), by Julia Rowan, PhD (Martinez) and Khi-Lynn Louis, LMSW

### Why is this topic important for E-MDTs? How can I apply this information to E-MDT work?

One of the common factors in cases accepted for review is their complexity and the need for various perspectives in creating a plan to support the victim. There are many types of elder abuse that often co-occur (physical, sexual, verbal, psychological, neglect, financial). If teams encounter an issue that needs to be addressed by an agency that is not represented, it is an opportunity to learn more from someone with that specialty lens and to research what agencies in the area may address this issue. Relationship building is key. It takes a lot of trust to bring a case to a team that has presented challenges to the work, more so to seek another’s perspective on a case.

### Take-aways from this presentation

What makes a case complex? While exact percentages can vary, research consistently indicates that a significant portion of older adults' experience abuse or neglect in some form during their later years. And more than half of those studied experienced more than one form of abuse. Many issues were mutually exacerbating, for example: mental illness affecting housing stability and financial resources or impacting their safety.

Other features in complex cases include:

- The case requires specialized expertise that is not easily accessible
- Increased frequency, severity, duration of abuse
- Continued contact between older adult and alleged abuser
- Dementia, mental illness, and/or physical impairment impacting assessment and intervention
- Abuser lives with the victim, has mental illness, addictions, history of violence, and is dependent on victim's income
- Ethical questions- streamlining conversations to meet client need, or client's ability to be a part of service plan and have their wishes validated.
- Isolation

How to assess whether a case should come to the team. Factors to consider:

- Older Adult's decision-making ability
- Whether an Older Adult is known to various elder abuse agencies
- Whether the Older Adult was removed from their residence under suspicious circumstances
- Ongoing abuse by caretaker
- Stealing social security, pension, SNAP benefits and draining assets
- Someone is preventing an Older Adult's attendance at religious services, social events, senior center or preventing the older adult from being interviewed by community services.
- Financial circumstances posing imminent risk
- Severe health risks

[Link to Power Point](#)

[Link to Recording: Wicked Problems: Complexity of Elder Mistreatment](#)

[Resources](#)

[PMT Case Recommendations](#)

[SAMPLE PMT Case Recommendations Form](#)

[SAMPLE Monthly Summary of Service Tracking Form](#)

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