



WISCONSIN
INDIANHEAD
TECHNICAL
COLLEGE

Experiential Learning Portfolio for 10544111 Legal and Financial Issues of Aging

Student Contact Information:

Name: _____ Student ID# _____

Email: _____ Phone: _____

It is highly recommended that you speak with the Academic Dean or instructor who teaches this course prior to completing a portfolio.

Directions

Consider your prior work, military, volunteer, education, training and/or other life experiences as they relate to each competency and its learning objectives. Courses with competencies that include speeches, oral presentations, or skill demonstrations may require scheduling face-to-face sessions. You can complete all of your work within this document using the same font, following the template format.

1. Complete the Student Contact Information at the top of this page.
2. Write an Introduction to the portfolio. Briefly introduce yourself to the reviewer summarizing your experiences related to this course and your future goals.
3. Complete each "Describe your learning and experience with this competency" section in the space below each competency and its criteria and learning objectives. Focus on the following:
 - What did you learn?
 - How did you learn through your experience?
 - How has that learning impacted your work and/or life?
4. Compile all required and any suggested artifacts (documents and other products that demonstrate learning).
 - Label artifacts as noted in the competency
 - Scan paper artifacts
 - Provide links to video artifacts
 - Attach all artifacts to the end of the portfolio
5. Write a Conclusion for your portfolio. Briefly summarize how you have met the competencies.
6. Proofread. Overall appearance, organization, spelling, and grammar will be considered in the review of the portfolio.
7. Complete the Learning Source Table. Provide additional information on the business and industry, military, and/or volunteer experiences, training, and/or education or other prior learning you mentioned in your narrative for each competency on the Learning Source Table at the end of the portfolio. Complete this table as completely and accurately as possible.

The portfolio review process will begin when your completed portfolio and Credit for Prior Learning Form are submitted and nonrefundable processing fees are paid to your local Credit for Prior Learning contact. Contact Student Services for additional information.

Your portfolio will usually be evaluated within two weeks during the academic year; summer months may be an exception. You will receive an e-mail notification regarding the outcome of the portfolio review from the Credit for Prior Learning contact. NOTE: Submission of a portfolio does not guarantee that credit will be awarded.

You have 6 weeks to appeal any academic decision. See your student handbook for the complete process to appeal.

To receive credit for this course, you must receive “Met” on 7 of the 9 competencies.

10544111 Legal and Financial Issues of Aging, 3 Associate Degree Credits

Course Description: Analyze legal and financial concepts and structures including Power of Attorney for health care/finance, guardianships, trusts, reallocation of assets, spending down, Medicare/Medicaid benefits, supplemental insurance, Social Security, elder abuse/neglect, financial exploitation, and relevant governmental policy. Apply knowledge through advocacy to benefit aging adults on local, state, and federal levels.

Introduction: Briefly introduce yourself to the reviewer summarizing your experiences related to this course and your future goals.

Competency 1: Explore governmental policy development surrounding the older adult population

Criteria: Your performance will be successful when:

- learner defines law
- learner distinguishes the types of law
- learner articulates the functions of the law
- learner differentiates the legal status of older adults
- learner differentiates law from public policy
- learner examines the future of public policy supporting older adults
- learner illustrates public policy requirements regarding institutional review boards in research

Learning Objectives:

- a. Explain what is meant by law
- b. Distinguish the types of law
- c. Explain the functions of the law
- d. Differentiate the legal status of older adults
- e. Differentiate a law from public policy
- f. Examine the future public policy needs to support older adults
- g. Illustrate public policy requirements regarding institutional review boards in research with older adults

Required Artifacts: None

Suggested Artifacts: None

Describe your learning and experience with this competency:

Met/ Not Met Evaluator Feedback:

Competency 2: Examine the decision-making rights of older adults

Criteria: You will know when you are successful when:

- learner explains informed consent
- learner outlines elements of information disclosure
- case study response examines risk management concerns
- case study response analyzes decision-making capacity in older adults
- learner examines the meaning of decision-making capacity in older adults

Learning Objectives:

- a. Explain the tenets of informed consent
- b. Outline elements of information disclosure with a service provider and older adult
- c. Examine concerns related to risk management and informed decision-making of older adults
- d. Analyze issues related to decision-making capacity in older adults
- e. Examine the meaning of decision-making capacity in older adults

Required Artifacts: None

Suggested Artifacts: None

Describe your learning and experience with this competency:

Met/ Not Met Evaluator Feedback:

Competency 3: Explore the legal aspects of death and dying

Criteria: You will know when you are successful when:

- learner distinguishes types of life sustaining medical treatments (LSMT)
- learner evaluates the benefits and burdens of life sustaining medical treatments (LSMT)
- learner examines futility in medical care
- learner outlines public policy related to death and dying
- learner differentiates between power of attorney (POA) and durable medical power of attorney (DPOA)
- learner explains advanced directives

Learning Objectives:

- a. Distinguish the various types of life sustaining medical treatments (LSMT)
- b. Evaluate the benefits and burdens of initiating, continuing, and terminating life sustaining medical treatments (LSMT)
- c. Examine what is meant by futility in medical care
- d. Outline current public policy related to death and dying in the United States
- e. Differentiate between the roles and responsibilities of power of attorney (POA) and durable medical power of attorney (DPOA)
- f. Explain the role and parameters of advanced directives

Required Artifacts: None

Suggested Artifacts: None

Describe your learning and experience with this competency:

Met/ Not Met Evaluator Feedback:

Competency 4: Differentiate legal interventions for incapacitated older adults

Criteria: You will know when you are successful when:

- learner distinguishes conditions that affect decision-making capacity in older adults
- learner illustrates advanced legal and financial planning interventions
- learner distinguishes parameters dictating involuntary civil commitment (ie hospitalization)
- learner explains guardianship
- learner differentiates the role of adult protective services (APS) with older adults
- learner explores representative payee programs
- learner explores estate planning
- learner explains decision-making capacity with participation in research studies

Learning Objectives:

- a. Distinguish cognitive, mental health, and/or physical conditions that affect decision-making capacity in older adults
- b. Illustrate voluntary, advanced legal and financial planning interventions
- c. Distinguish parameters when involuntary civil commitment (ie hospitalization) is necessary for older adults
- d. Explain the role and use of guardianship with older adults
- e. Differentiate the role and use of adult protective services (APS) with older adults
- f. Explore how representative payee programs are utilized with older adults
- g. Explore opportunities and challenges related to estate planning
- h. Explains how decision-making capacity correlates with an older adult's participation in research studies

Required Artifacts: None

Suggested Artifacts: None

Describe your learning and experience with this competency:

Met/ Not Met Evaluator Feedback:

Competency 5: Categorize the regulation and financing of geriatric settings and services

Criteria: You will know you are successful when:

- learner contrasts the financing of home care services
- learner examines regulatory requirements for home care agencies
- learner analyzes home care agency and client relationships
- learner distinguishes consumer-directed long-term care services for older adults
- learner classifies services provided by assisted living providers
- learner illustrates how assisted living services are financed
- learner explores regulation of assisted living facilities
- learner examines accreditation of long-term care services
- learner differentiates services provided by continuing care retirement communities (CCRC)
- learner distinguishes hospice eligibility and service provision
- learner explains hospice regulation and reimbursement
- learner illustrates adult day care services and financing
- learner explains the regulation of nursing homes
- learner illustrates the reimbursement of nursing home care
- learner outlines common techniques used to become Medicaid-eligible (ie "spend-down", disbursing assets)

Learning Objectives:

- a. Contrast how home care services are financed (ie fee for service, reimbursed through insurance)
- b. Examine the regulatory parameters of home care agencies
- c. Analyze opportunities and challenges of home care agency and client relationships
- d. Distinguish services and reimbursement for consumer-directed long-term care
- e. Classify the types of care provided in an assisted living setting
- f. Illustrate the financing of assisted living services
- g. Explore the regulatory requirements of assisted living facilities
- h. Examine accreditation for long-term care services
- i. Differentiate the care levels and services provided by continuing care retirement communities (CCRC)
- j. Distinguish hospice eligibility and service provision for the terminally ill
- k. Distinguish hospice regulatory requirements and financing
- l. Illustrate adult day care services and how they are financed
- m. Explain the regulatory environment of nursing homes
- n. Illustrate how nursing home care is reimbursed, and by whom
- o. Outline techniques used by older adults to become Medicaid-eligible (ie "spend-down", asset disbursement)

Required Artifacts: None

Suggested Artifacts: None

Describe your learning and experience with this competency:

Met/ Not Met Evaluator Feedback:

Competency 6: Explore older adults' right to privacy

Criteria: You will know when you are successful when:

- learner summarizes professionals' obligation to maintain confidentiality with clients
- learner explains public policy mandates outlining patient privacy
- learner identifies circumstances when there is a professional obligation to breach confidentiality
- learner explores professional codes of ethics
- learner differentiates conditions that necessitate reporting of medical conditions
- learner distinguishes processes clients can initiate allowing professionals to release confidential information

Learning Objectives:

- a. Summarize the obligation professionals have to maintain client confidentiality
- b. Explain public policy mandates that outline patient privacy (ie HIPAA)
- c. Identify circumstances when a professional is required to breach client confidentiality
- d. Explore professional codes of ethics
- e. Differentiate conditions that necessitate reporting of medical conditions
- f. Distinguish organizational processes clients can initiate that allows professionals to release confidential information to others

Required Artifacts: None

Suggested Artifacts: Documentation of current licensure or other credential(s) with corresponding ethical standards.

Describe your learning and experience with this competency:

Met/ Not Met Evaluator Feedback:

Competency 7: Identify financial and legal issues that involve older adults and their families

Criteria: You will know when you are successful when:

- learner evaluates families' duty to care for an older adult
- learner contrasts varied caregiving skills of families with potential risks in caring for an impaired older adult
- learner summarizes legislation that supports family caregivers
- learner illustrates the rights of grandparents
- learner explores kinship care

Learning Objectives:

- a. Evaluate families' duty to care for an older adult
- b. Contrast the varied caregiving skills of family members with the potential risks of caring for an impaired older adult
- c. Summarize legislation that supports family caregivers in the United States
- d. Illustrate the rights of grandparents
- e. Explore kinship care and the factors that contribute to this familial arrangement

Required Artifacts: None

Suggested Artifacts: None

Describe your learning and experience with this competency:

Met/ Not Met Evaluator Feedback:

Competency 8: Explain the types of elder mistreatment

Criteria: You will know when you are successful when:

- learner explains elder abuse
- learner differentiates the types of elder abuse
- learner summarizes elder neglect
- learner explores financial exploitation and misappropriation of property
- learner outlines government legislation protecting older adults from abuse
- learner explores elder mistreatment in institutional settings
- learner summarizes fraud targeting older adults

Learning Objectives:

- a. Explain the tenets of elder abuse
- b. Differentiate the types of elder abuse (ie physical, sexual, emotional, psychological)
- c. Summarize elder neglect and its types (ie passive, active)
- d. Explore financial exploitation and misappropriation of property with older adults
- e. Outline government legislation protecting older adults from elder abuse in the United States
- f. Explore the mistreatment of older adults residing in institutional settings
- g. Summarize types of fraud that targets older adults

Required Artifacts: None

Suggested Artifacts: None

Describe your learning and experience with this competency:

Met/ Not Met Evaluator Feedback:

Competency 9: Summarize age discrimination and the law

Criteria: You will know when you are successful when:

- learner explains the relevance of a person's age related to age discrimination
- learner explores age discrimination in employment
- learner differentiates discrimination based on physical and/or mental health disabilities
- learner examines health care rationing
- learner summarizes discrimination in voting with older adults
- learner distinguishes discrimination that favors older adults

Learning Objectives:

- a. Explain how a person's chronological age affects parameters related to age discrimination
- b. Explore age discrimination in employment
- c. Differentiate discrimination based on physical and/or mental health disabilities
- d. Examine the benefits and burdens of health care rationing
- e. Summarize the discrimination of older adults in voting
- f. Distinguish how discrimination can favor older adults

Required Artifacts: None

Suggested Artifacts: None

Describe your learning and experience with this competency:

Met/ Not Met Evaluator Feedback:

