

# **Webinar:** Addressing Financial Exploitation in Older Adults Through Community Partnerships

**Facilitated By:** Peter Maramaldi, PhD, LCSW, MPH

**Presented By:** Elizabeth Petruy, Kristin Lees Haggerty, PhD, Julie  
Schoen, JD

**March 31, 2022**



# About NCECE

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**Who We Are:** Established in 2017, the National Center for Equitable Care for Elders (NCECE) is a training and technical assistance Center that provides innovative and culturally competent models of care, inter-professional training and educational resources to health care professionals providing care to older adults.

**Our Mission** is to build strong, innovative and competent health care models by partnering with CHCs, PCAs and FQHCs to provide quality and inclusive care for older adults.

## **Stay Connected With NCECE:**

**Twitter:** [twitter.com/NationalECE](https://twitter.com/NationalECE)

**Facebook:** <https://www.facebook.com/NationalECE>

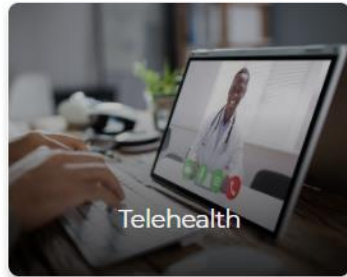
**Website:** [ece.hsdm.harvard.edu](http://ece.hsdm.harvard.edu)

**Email:** [ece@hsdm.harvard.edu](mailto:ece@hsdm.harvard.edu)



# COVID-19 Resources

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<https://www.healthcenterinfo.org/priority-topics/covid-19/>



# Reminders

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- Please stay muted to prevent echo and background noise
- Use the Q&A or chat box to ask a question during the session
- This webinar is being recorded and materials will soon be emailed to participants
- We would love to hear your feedback – please fill out our brief evaluation at the end of the session!



# Learning Objectives

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- Examine health, financial, and technological risk factors in older adults that contribute to susceptibility to fraud or exploitation
- Explain the benefits and limitations of social needs assessments to identify forms of elder abuse
- Adopt shared strategies for collaboration with aging services providers and local organizations to support at-risk older adult patients



# Today's Speakers

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**Peter Maramaldi, PhD, LCSW,  
MPH**

*Simmons University, Harvard  
Schools of Public Health and  
Dental Medicine, Social  
Determinants of Health Subject  
Matter Expert, NCECE*



**Elizabeth Petruy**  
*Aging Services Program  
Specialist, Office of Elder Justice and  
Adult Protective Services (ACL)*



**Julie Schoen, JD**  
*Deputy Director of the National  
Center on Elder Abuse (NCEA)*



**Kristin Lees Haggerty, PhD**  
*Project Director, National  
Collaboratory to Address Elder  
Mistreatment*



# **Addressing Financial Exploitation in Older Adults Through Community Partnerships**

Elizabeth Petruy

Administration for Community Living (ACL)

March 31, 2022

# What is ACL?

- Established in 2012, part of HHS
- Brought together the Administration on Aging, the Office on Disabilities, and the Administration on Developmental Disabilities
- Community Living: older adults and people with disabilities have the right to live where and with whom they choose, and fully participate in their communities





# ACL's Vision for Elder Justice

A comprehensive, multidisciplinary approach that effectively supports older adults and adults with disabilities so they can exercise their right to live where they choose, with the people they choose, and fully participate in their communities without threat of abuse, neglect, or financial exploitation.



# ACL's Elder Justice Portfolio

## Legal Services

- Title III-B
- National Center for Law & Elder Rights
- Legal Assistance Enhancement Program

## Income Security

- Pension Counseling Projects
- National Pension Assistance Resource Center

## APS

- State Grants to Enhance APS
- Voluntary Consensus Guidelines for APS
- NAMRS
- National APS Resource Center
- Formula Grants

## LTCOP

- Office of the Nat'l LTC Ombudsman
- LTC Ombudsman Resource Center
- NORS

## Elder Abuse


- Title VII
- EJ Innovation Grants
- Late Life Domestic Violence
- Elder Abuse Prevention Grants
- NCEA
- World Elder Abuse Awareness Day

# What is Elder Abuse?


- Elder abuse is
  - the mistreatment or harming of an older person. It can include physical, emotional, or sexual abuse, along with neglect and financial exploitation
  - an injustice that we all need to prevent and address
  - under-detected, under-reported
  - multifaceted, and different forms can occur at the same time
  - occurring in community and institutional settings



# Some Statistics

- 80 million Americans will be aged 65 or older by the year 2040, nearly 21% of the population
  - 1 in 10 Americans age 60+ experience at least one form of elder abuse every year
  - 67% of older adults abused are women
  - 1 in 24 cases are reported
- 

# Types of Elder Abuse

- **Physical Abuse**—inflicting physical pain or injury on a senior, e.g. slapping, bruising, or restraining by physical or chemical means.
  - **Emotional Abuse**—inflicting mental pain, anguish, or distress on an elder person through verbal or nonverbal acts, e.g. humiliating, intimidating, or threatening.
  - **Sexual Abuse**—non-consensual sexual contact of any kind.
  - **Neglect**—the failure by those responsible to provide food, shelter, health care, or protection for a vulnerable elder.
  - **Self-neglect**—characterized as the failure of a person to perform essential, self-care tasks and that such failure threatens his/her own health or safety.
  - **Financial Exploitation**—the illegal taking, misuse, or concealment of funds, property, or assets of a senior for someone else's benefit.
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# Financial Exploitation

- Could be perpetrated by
  - a known or trusted individual, or
  - a stranger (elder fraud)



# NATIONAL CENTER ON ELDER ABUSE (NCEA)

**NCEA**  
National Center on Elder Abuse

Keck School of  
Medicine of **USC**

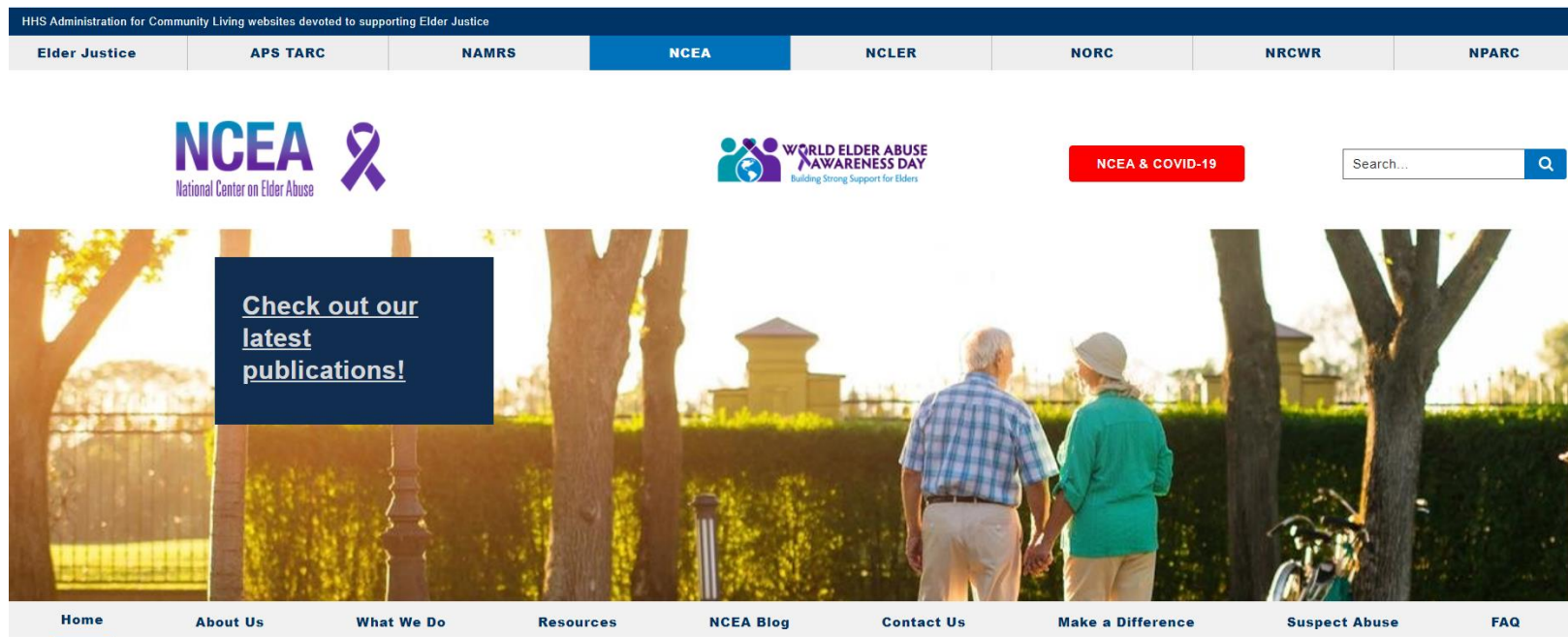
[ncea.acl.gov](http://ncea.acl.gov)





# National Center on Elder Abuse (NCEA)

The NCEA strives to improve the national response to elder abuse, neglect, and exploitation.



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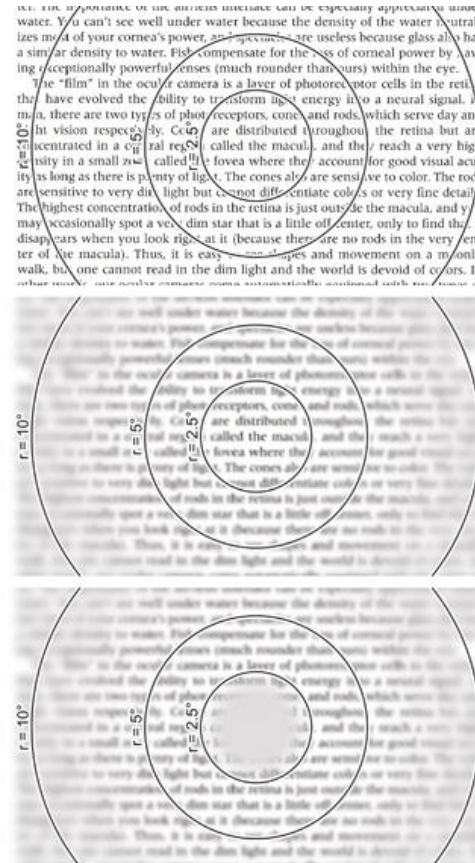
# What Causes Elder Abuse?

- ❑ Social isolation
- ❑ Lack of access to support services and community resources
- ❑ Physical, mental, or emotional needs in carrying out daily activities

# Isolation- A Major RISK Factor

Occurs in many ways:

- Loss of visual cues
  - *Ex-Macular Degeneration*
- Loss of auditory cues
  - *Can you hear me now?*
- Limitations with Mobility
  - Wheelchairs/walkers
  - *Loss of drivers license*

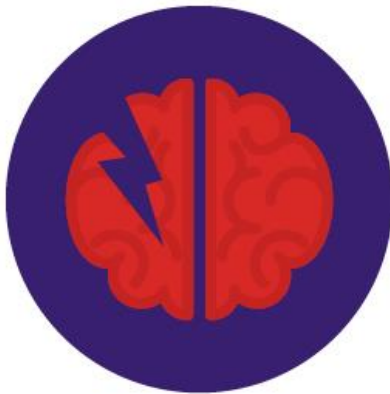


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# Signs of Elder Abuse

## Emotional/Behavioral Signs of Elder Abuse



Increased fear  
or anxiety



Isolation from  
friends or family



Unusual changes  
in behavior or sleep



Withdrawal from  
normal activities

To learn more, visit [ncea.acl.gov](https://ncea.acl.gov)

# Signs of Elder Abuse

## Financial Signs of Elder Abuse



Fraudulent signatures  
on financial documents



Unpaid bills

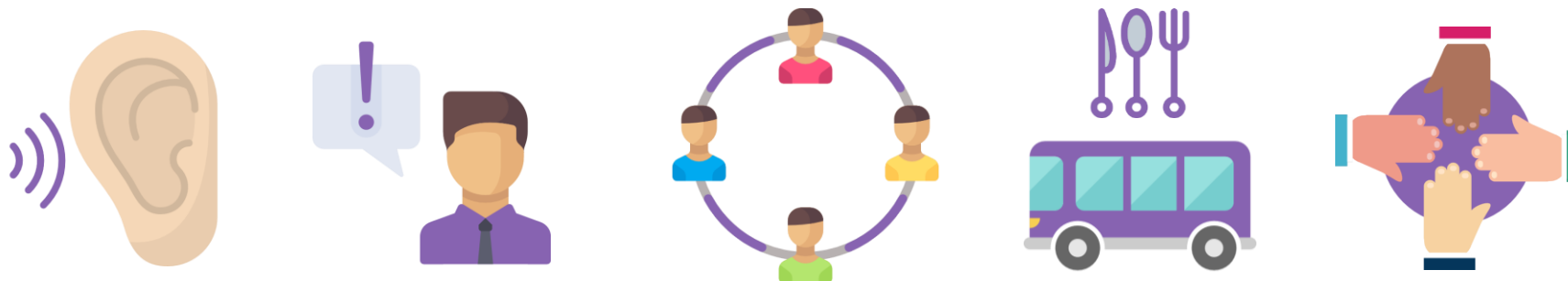


Unusual or sudden changes  
in spending patterns, will, or  
other financial documents

To learn more, visit [ncea.acl.gov](https://ncea.acl.gov)

# Preventing Elder Abuse in Our Community

Elder abuse is **preventable** – and everyone has a role to play. It is up to all of us to build strong supports for one another and prevent abuse before it happens.





# Supports and Tools for Elder Abuse Prevention (STEAP)



## Customizable Elder Abuse Outreach Toolkit

Elder Abuse prevention and outreach can take place at any distance.



### Social Media Tips

**Engaging Other Professionals, Agencies, and Organizations**

- Ask about engagement
- "Like" their Facebook pages, posts, and comments
- Follow, reply, "tag" and retweet
- "Tag" other agencies or people at events to increase audience and maximize social engagement

**Engaging Audience and Maximizing Reach**

- Keep posts as brief as possible
- Add visuals to posts to increase interest. A photo, link, video, infographic, or video can generate significantly more attention
- Schedule posts to appear during peak multiple time zones, and stay on it consistently

### Building Community Supports to Prevent Elder Abuse



### About Elder Abuse



Access free tools here:

<https://ncea.acl.gov/Resources/STEAP.aspx>



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# Reframing Elder Abuse

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## What is the Reframing Elder Abuse Project?



Reimagines our cultural dialogue on elder abuse

Improves the public's awareness of elder abuse

Enhances understanding of the underpinning issues

Elevates public exchange on the topic

# NATIONAL CENTER ON ELDER ABUSE (NCEA) & Related Projects

	Training Resources on Elder Abuse (TREA)	<a href="https://trea.usc.edu/">https://trea.usc.edu/</a>
	Reframing Elder Abuse Project	<a href="https://ncea.acl.gov/Resources/Reframing.aspx">https://ncea.acl.gov/Resources/Reframing.aspx</a> <a href="https://eagle.usc.edu/">https://eagle.usc.edu/</a>
	Supports and Tools for Elder Abuse Prevention (STEAP)	<a href="https://ncea.acl.gov/Resources/STEAP.aspx">https://ncea.acl.gov/Resources/STEAP.aspx</a>
	World Elder Abuse Awareness Day (WEAAD)	<a href="https://ncea.acl.gov/WEAAD.aspx">https://ncea.acl.gov/WEAAD.aspx</a>
	Elder Abuse Guide for Law Enforcement (EAGLE)	<a href="https://eagle.usc.edu/">https://eagle.usc.edu/</a>



# World Elder Abuse Awareness Day (WEAAD)

**World Elder Abuse Awareness Day BINGO**

When you have BINGO, share with the National Center on Elder Abuse (NCEA) on Facebook (@NationalCenterOnElderAbuse) or Twitter (@NCEAUSC) using the hashtag #WEAAD.

W	E	A
<input type="checkbox"/> is the color associated with elder abuse awareness.	If someone is in immediate danger, call <input type="text"/> .	abuse can cause bodily injury, physical pain, or impairment.
<input type="checkbox"/> is a known risk factor for elder abuse.	The National Elder Fraud Hotline is <input type="text"/> .	The impact of elder abuse is felt by people of <input type="text"/> ages.
Social Security scams can be reported to <input type="text"/> .	About 1 in <input type="text"/> Americans aged 65+ have experienced abuse.	Create a society <b>FREE</b> from Elder Abuse.
Approximately 50% of people living with <input type="text"/> experience abuse or neglect.	Unwanted touching is an example of <input type="text"/> abuse.	It is up to <input type="text"/> to prevent and address elder abuse.
World Elder Abuse Awareness Day was launched in <input type="text"/> .	Government impersonation and the grandparent scam are examples of <input type="text"/> .	<input type="text"/> receives and investigates reports of abuse, neglect, and exploitation in the community.

**World Elder Abuse Awareness Day Caravan Event Guidelines**

**Organize a WEAAD car caravan!**

A car caravan is a parade of cars that drives through a strategically selected route. Each car in the caravan displays messages or images to raise awareness of WEAAD.

**EVENT PLANNING**

- Identify a primary point of contact to provide communication and logistical support for the event.
- Determine a start & end point and map out a clear route.
  - Take into consideration the number of cars and stoplights, etc.
  - Secure relevant city approvals, including from the police department (escort or non-escort).
- Event promotion can be done through social media or by flyers. Templates are available on the [WEAAD microsite](#).

**SPREAD AWARENESS BY DECORATING YOUR CARS**

- WEAAD's Date: **June 15th**
- WEAAD Logo
- [5 Things Everyone Can Do to Prevent Elder Abuse](#)
- National Elder Fraud Hotline: 1-833-372-8311
- Local elder abuse reporting numbers (Adult Protective Services, Long-Term Care Ombudsman)

Refer to the CDC's considerations for events and gatherings. Consult with local/state public health officials as they have the most up-to-date, relevant information for each community's needs, restrictions, and guidelines.

**June 15th!**

**WORLD ELDER ABUSE AWARENESS DAY**  
Building Strong Support for Elders

**NCEA**  
National Center on Elder Abuse

**ACL**  
American Civil Liberties Union

## Participate in the #WEAAD615 Challenge!



List **six facts** about Elder Abuse everyone should know.



Share **one thing** you can do to prevent Elder Abuse.



Tag **five people** to participate in this challenge.

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National Center on Elder Abuse

**WORLD ELDER ABUSE AWARENESS DAY is June 15th!**

**NCEA**  
National Center on Elder Abuse

**WORLD ELDER ABUSE AWARENESS DAY is June 15th!**



## Elder Abuse Identification and Clinical Management in Primary Care

Primary care providers can join a five-part online ECHO series featuring faculty Laura Mosqueda, MD and Bonnie Olsen, PhD, who will provide a framework to address elder abuse in clinical settings.



<https://gwep.usc.edu/echo/>

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**Geriatric Healthcare Collective**

**NCEA**  
National Center on Elder Abuse

Accreditation Statement: The Keck School of Medicine of USC is accredited by the Accreditation Council for Continuing Medical Education to provide continuing medical education for physicians.

# THE **EAGLE** HAS LANDED

## ELDER ABUSE GUIDE FOR LAW ENFORCEMENT

### CONTACT US

[eaglehelp@usc.edu](mailto:eaglehelp@usc.edu)

[www.eagle.usc.edu](http://www.eagle.usc.edu)



Designed to support Law Enforcement officers in quickly identifying, intervening, and resolving elder abuse situations.



Tools to assist in documenting a case for prosecution



ZIP code-based community resources locator



State-by-state penal codes relating to elder abuse


**EAGLE**   
Elder Abuse Guide for Law Enforcement



# Training Resources on Elder Abuse (TREA)



What would you like to learn today?

Search for Training Resources Related to Elder Abuse 

Select Use



Select a Topic



Search



## Training Resources on Elder Abuse

A searchable database of elder abuse related training materials designed for professionals, caregivers and the community.

Inspired by the [Elder Justice Roadmap](#), our goal is to increase the number of professionals, caregivers and community members who receive high quality training on elder abuse.

Need assistance with an elder abuse inquiry? Visit the [National Center on Elder Abuse \(NCEA\)](#).

## New and Notable

-  [USC Judith D. Tamkin Symposium on Elder Abuse](#)
-  [The National Center on Law & Elder Rights' Elder Justice Toolkit](#), with national resources on civil legal aid and elder abuse, is now available on their website

# Thank You!

## National Center on Elder Abuse (NCEA)

- 1-855-500-3537 (ELDR)
- [ncea-info@aoa.hhs.gov](mailto:ncea-info@aoa.hhs.gov)
- <https://ncea.acl.gov/>

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National Collaboratory to Address  
**Elder Mistreatment**

# IDENTIFYING AND RESPONDING TO ELDER MISTREATMENT IN HOSPITAL EMERGENCY DEPARTMENTS

NCECE Webinar, March 31, 2022

Kristin Lees Haggerty, PhD



The  
**John A. Hartford**  
Foundation

GORDON AND BETTY  
**MOORE**  
FOUNDATION



# Agenda

- + Introduction to The National Collaboratory to Address Elder Mistreatment
- + The Emergency Department Elder Mistreatment Toolkit
- + Building connections between hospital and community-based partners



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# THE NATIONAL COLLABORATORY TO ADDRESS ELDER MISTREATMENT

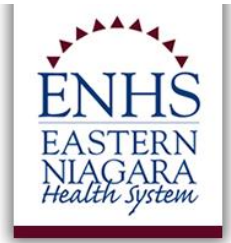


# The National Collaboratory to Address Elder Mistreatment: Founding Partners



The National Collaboratory to Address Elder Mistreatment is supported by a grant to EDC from The John A. Hartford Foundation, The Gordon and Betty Moore Foundation, and The Health Foundation for Western and Central New York

# The National Collaboratory to Address Elder Mistreatment: Partners



# NCAEM Goals



- ✓ Reduce number of missed opportunities to identify cases of elder mistreatment in the emergency department (ED).
- ✓ Increase referrals to appropriate authorities and community-based services.
- ✓ Reduce repeat victimization and, possibly, return to hospital ED.



“Getting trapped in this environment that you can't get out of.”..... In a position of going to the emergency room for that kind of abuse I can guarantee you the reason they're there. That's not the first time they've been abused. It's the worst time they've been abused.”

– *Participant Statement*

# EMERGENCY DEPARTMENT ELDER MISTREATMENT TOOLKIT FEASIBILITY STUDY

# The Emergency Department Elder Mistreatment Toolkit

The toolkit has four key elements.

## ED Staff Survey

20 question/10 minute online tool for ED staff assessed current practices and defines priorities for practice and systems change.



## Online Training Modules

Interactive online training in how to identify and respond to elder mistreatment.



## Screening and Response Tool

Brief screening and response tools to identify at-risk patients and develop safety and discharge plans.

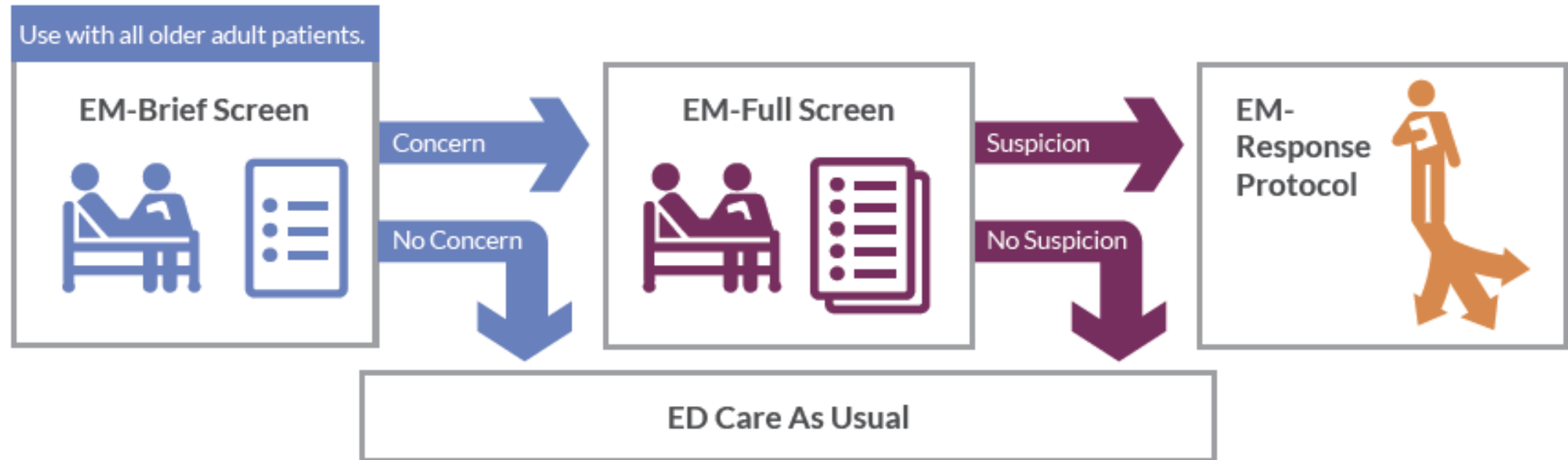


## Community Connections Roadmap

A guide for identifying and connecting with community partners that can support patient safety and follow up.



# The Emergency Department Elder Mistreatment Toolkit Workflow



# Feasibility Study



## Research Questions

1. Is the **Toolkit feasible** to implement in the emergency department (ED)?
2. Can EDs better **identify and manage elder mistreatment** when they implement the Toolkit?
3. How does implementation of the Toolkit affect **ED functioning**?



# Clinical Test Sites



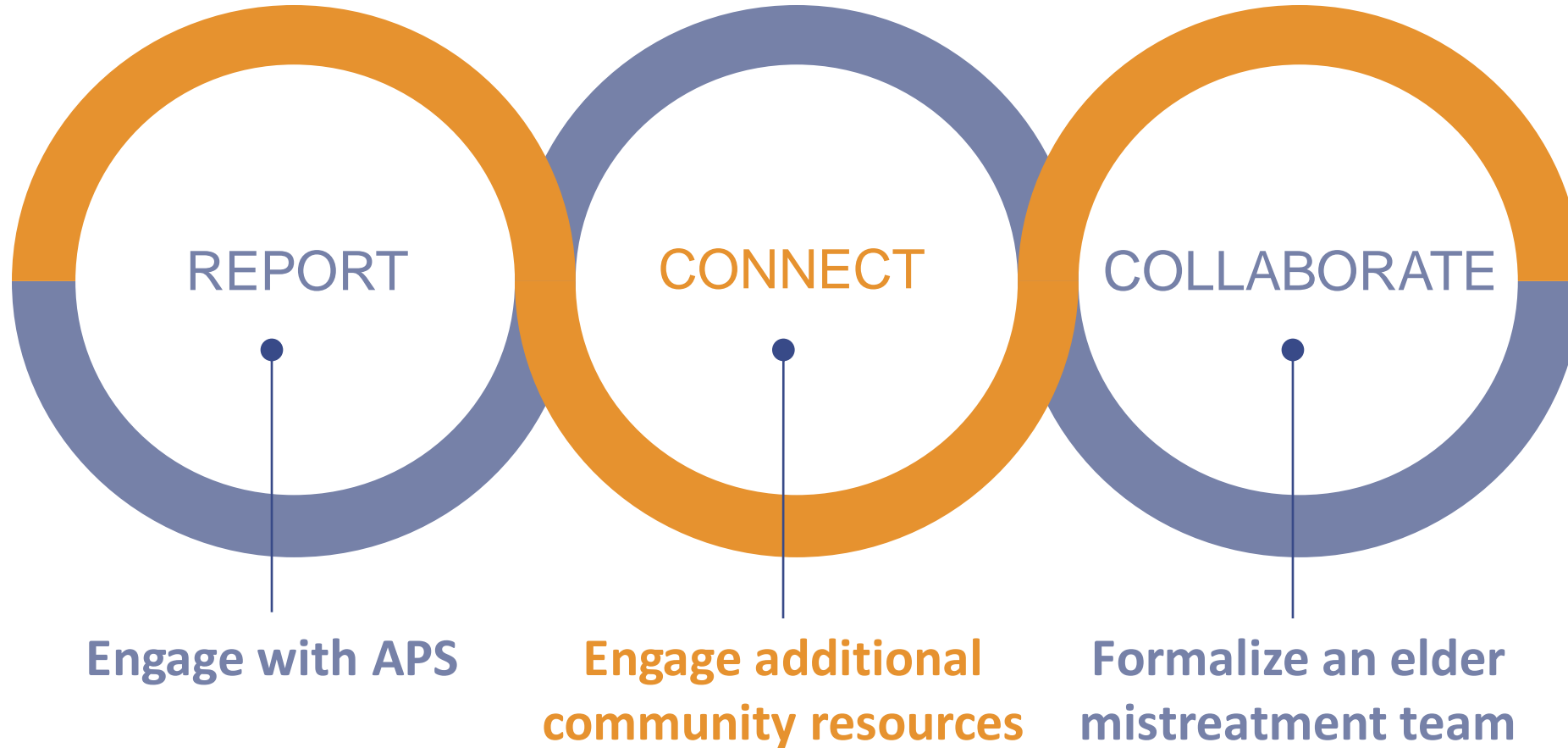
# Lessons Learned



- ➔ model possible to deploy in large, high-resource and small, low resource EDs
- ➔ different EDs will implement with varied workflows
- ➔ clinical champion essential, and hand-off to team member with expertise helpful
- ➔ including elements of screening within EMR helpful to ensure performed
- ➔ strengthening connections to community critical
- ➔ opportunities exist to provide services to other vulnerable adults identified by screening process

# **BUILDING CONNECTIONS BETWEEN HOSPITAL AND COMMUNITY-BASED PARTNERS**

# Elder Mistreatment Community Connections Roadmap





National Collaboratory to Address  
**Elder Mistreatment**

# THANK YOU



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WHAT RESOURCES ARE AVAILABLE?

# Resources

- Adult Protective Services (APS)
  - Long-Term Care Ombudsmen
  - Eldercare Locator
    - [Eldercare.acl.gov](http://Eldercare.acl.gov)
    - 1-800-677-1116
  - National Elder Fraud Hotline
    - 833-FRAUD-11 or 833-372-8311
  - Medical Legal Partnerships
- 





# Questions?

# Thank You!

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**We appreciate your participation in this webinar. Please take a moment to provide your feedback by taking a brief survey!**

**The link will be in the chat box and will also open in a separate window when you exit this session.**

