



Wisconsin Elder Death Review Team (EDRT) Toolkit

May 2025

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INTRODUCTION TO THE TOOLKIT

Introduction to Resource Guide

This guide is designed to facilitate the development, evolution, and sustainability of Elder Death Review Teams (EDRTs) in Wisconsin. This guide offers resources and tools to support existing and new EDRTs to review cases to identify and address education and prevention gaps.

These materials help build a solid foundation for Wisconsin EDRTs by providing common mission and vision statements, team objectives, recruitment details, team structure, coordinator tasks, case details, meeting protocol, and team evaluation. Additional resources and templates are provided to assist Wisconsin EDRTs in building from the foundation to personalize their team to best meet the needs of their specific demographic. No two teams are alike and EDRT coordinators should consider their team and community demographic when building and navigating their teams.

The toolkit includes a hyperlinked Table of Contents to help you navigate easily. Click on any sections title in the Table of Contents to jump directly to that part of the document. At the end of each section, you will find a **“Return to the Table of Contents”** link. Clicking this link will take you back to the Table of Contents, allowing for easy navigation throughout the toolkit. If the links do not open automatically, hold **Ctrl** (or **Command on Mac**) while clicking the link.

Some of the resources provided may include the term Elder Abuse Fatality Review Team (EAFRT) or Elder Fatality Review Team (EFRT); these are both synonymous with Elder Death Review Team (EDRT).

Resources are marked with an asterisk (*) and are *italicized* throughout the document and are listed in the Resource Section along with a brief description.

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INTRODUCTION TO ELDER DEATH REVIEW TEAMS (EDRTs)

EDRT Definition

A collaborative, diverse community delves into the narrative of an older or vulnerable adult's experience aiming to comprehend pre-existing vulnerabilities and conditions leading up to, during, and after a fatal incident. By doing so, it seeks to grasp the underlying risk factors and circumstances involved.

This approach, known as Elder Death Review (EDR), collects a wide range of data to gain an encompassing understanding of how individual, communal, and societal elements intertwine to impact older and vulnerable adult well-being and safety. Utilizing knowledge, proactive measures are taken to enhance systems and prevent future tragedies.

Elder Death Review provides a team of professionals with insights into both the older and vulnerable adult's life and the mechanisms designed to safeguard them (Covington & Collier, 2024). This multi-disciplinary team consists of members from state, local, and county law enforcement, prosecutors, chief medical examiner, victim advocates, sexual assault nurse examiners, licensing and regulatory services, elder services, adult protective services, emergency medical services, long-term care ombudsman, and adult mental health.

The teams should aim to convene at least quarterly to examine specific cases to determine if the systems designed to aid and protect victims were adequate for the circumstances or if adjustments and improvements are necessary. EDRT coordinators must consider their team and community demographic and schedule meetings accordingly.

Wisconsin EDRT History

At the time of this Toolkit creation, Wisconsin has one Elder Death Review Team (EDRT) located in Milwaukee—identified as an Elder Fatality Review Team (EFRT).

The history of the EFRT in Milwaukee is rooted in the county's efforts to address the rising cases of elder abuse and neglect. Initiated as part of a comprehensive approach to elder justice, the Elder Fatality Review Team was established to thoroughly examine deaths of elderly individuals where abuse or neglect is suspected.

This initiative aims to identify systemic gaps and failures that can prevent future fatalities. By involving a diverse group of professionals, including law enforcement, healthcare providers, and social services, the EFRT develops protocols for better case management and preventative measures.

The formation of the EFRT is integral to Milwaukee’s strategy under an Enhanced Multi-disciplinary Team (EMDT) grant, aligning with broader efforts to enhance community responses to elder abuse (LaCaze & Flater, 2023).

With grant funding, the Elder Death Review Team Committee, a subgroup of the Wisconsin Elder Justice Coalition, met monthly to create a statewide EDRT process and toolkit to provide the resources needed to create additional EDRTs in Wisconsin, ensuring at least one additional EDRT is added to the state by September 2025.

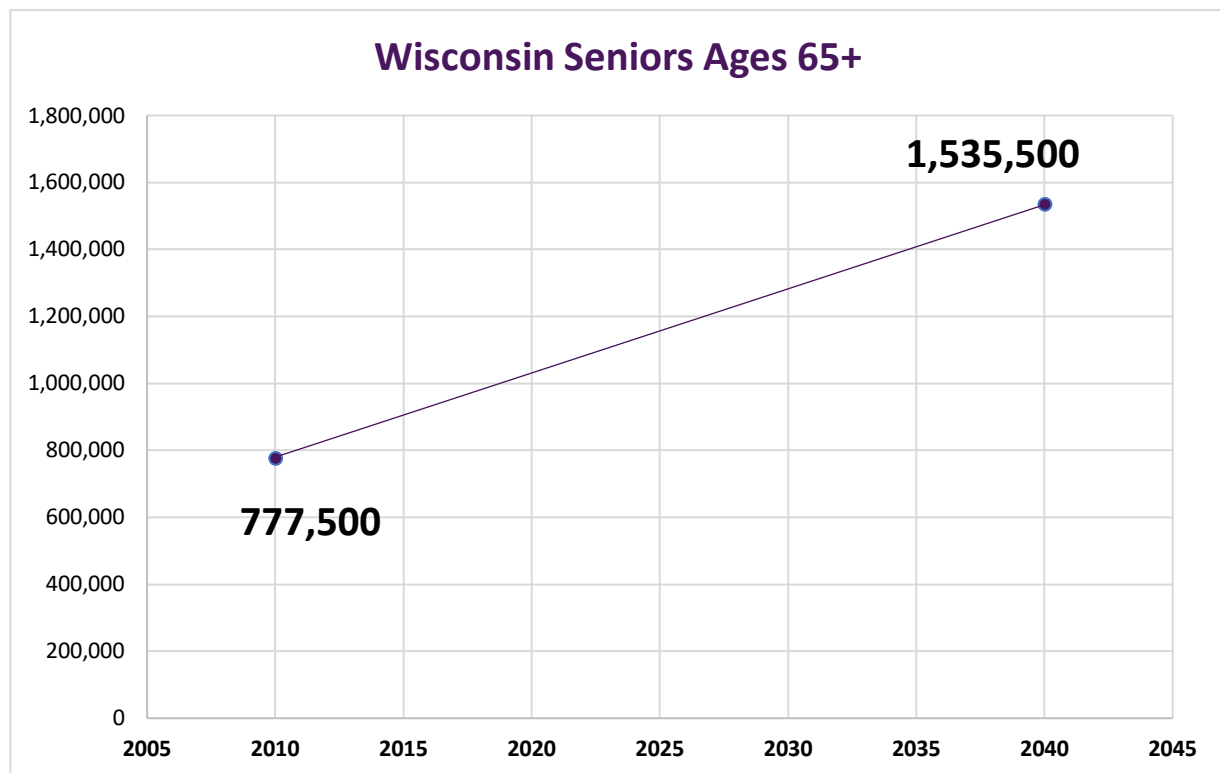
The Need for EDRT in Wisconsin

Aging Population

As Wisconsin’s population of older adults grows, so does the importance of strengthening systems to protect this vulnerable group from abuse and neglect. Elder Death Review Teams (EDRTs) aim to fill this need by prioritizing case reviews, process improvements, and preventive strategies to reduce risk and improve outcomes for older adults. An EDRT’s mission includes analyzing factors leading to elder abuse-related fatalities and making systemic changes to protect individuals at risk.

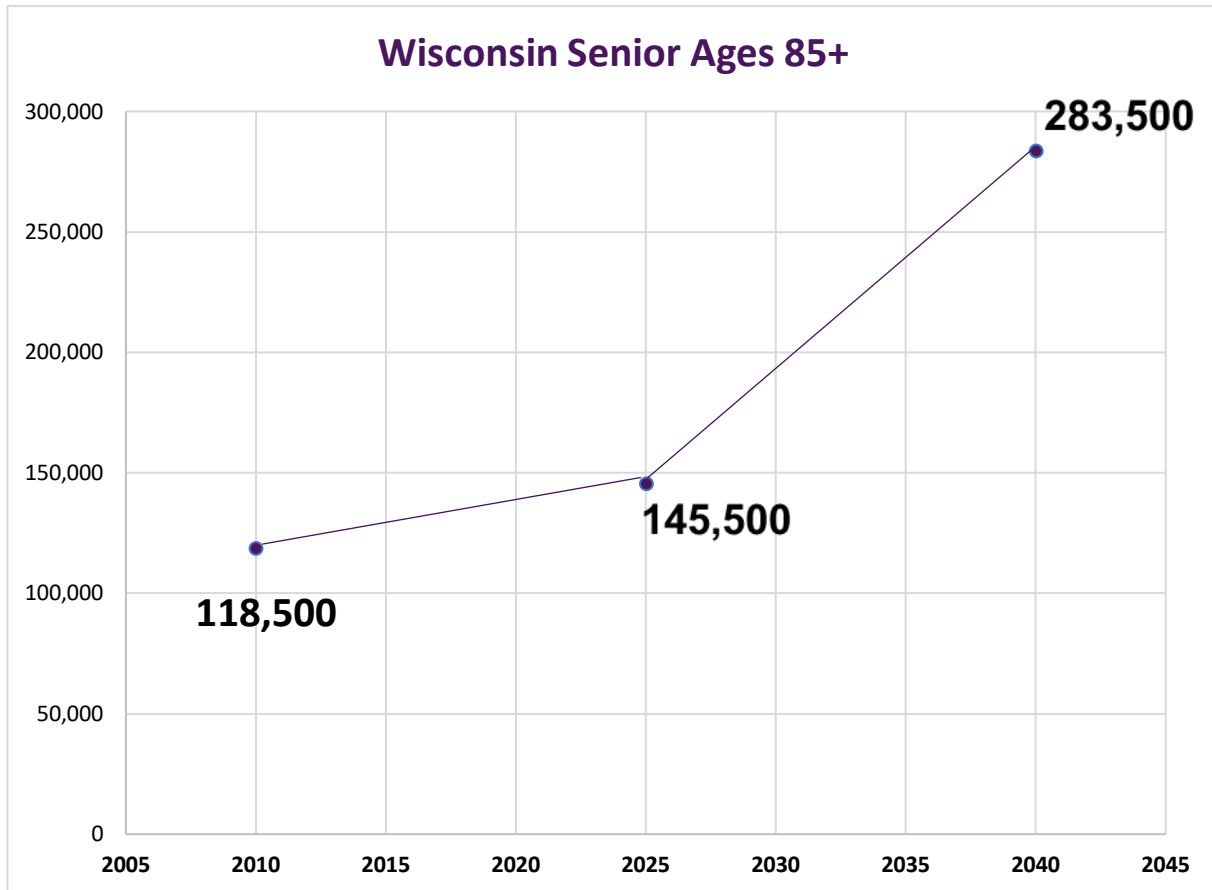
Ages 65+

Wisconsin is projected to see a 97% increase individuals ages 65+ from 2010 to 2040 (Egan-Robertson, 2013).



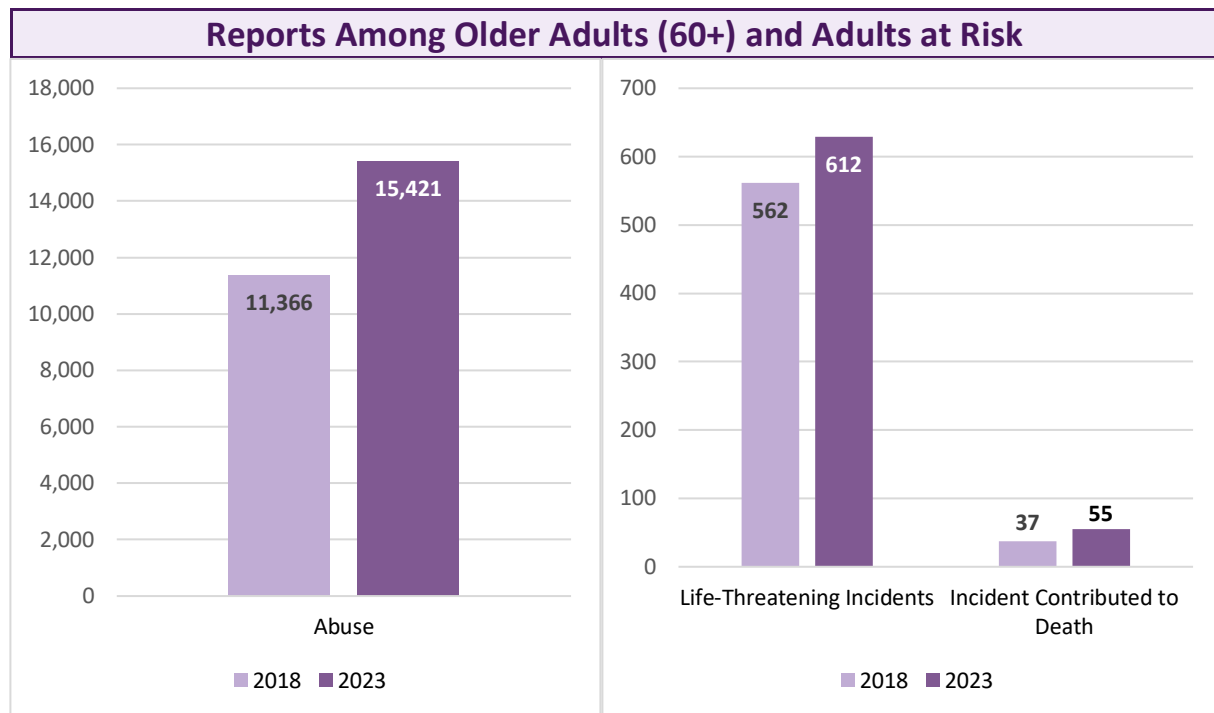
Ages 85+

Wisconsinites ages 85+ increased by 22% from 2010 to 2025 and it is estimated that this demographic will increase by 95% from 2025 to 2040, resulting in a 139% increase in Wisconsin residents ages 85+ from 2010 to 2040 (Egan-Robertson, 2013).



Increase in Reported Abuse

The Wisconsin Incident Tracking System (WITS) has documented a significant rise in reported abuse cases among older adults and adults at risk (age 60+). From 2018 to 2023, reports increased from 11,366 to 15,421 cases—a 36% rise. Life-threatening incidents climbed as well, from 562 in 2018 to 612 in 2023, increasing by 9%. Tragically, cases where the incident directly contributed to an individual's death rose by 49%, from 37 in 2018 to 55 in 2023 (Wisconsin Department of Health Services, 2024).



This trend underscores the urgent need for EDRTs to address not only the immediate causes of abuse but also the systemic vulnerabilities that allow such cases to escalate. By conducting in-depth case reviews and identifying patterns, EDRTs can play a crucial role in preventing elder abuse and protecting Wisconsin's aging population.

One of the primary challenges in establishing EDRTs has been limited time, talent, and financial resources, which impacts Adult Protective Services/Elder Abuse (APS/EA) staff's ability to provide direct services to elders. A dedicated EDRT coordinator can address these limitations by focusing on case prioritization and improving coordination, which allows APS/EA staff to shift from reactive measures to proactive prevention—ultimately enhancing outcomes, safety, and care for older adults (Stiegel, 2019).

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MISSION, VISION, AND TEAM OBJECTIVES

WI EDRT Mission Statement

The Wisconsin Elder Death Review Team (WEDRT) seeks to foster collaboration among diverse professionals to thoroughly investigate and understand the circumstances surrounding elder and vulnerable adult deaths. By identifying systemic gaps, risk factors, and trends, the WEDRT works to enhance community education, improve inter-agency coordination, and advocate for prevention strategies. Our mission is to honor the lives of those we serve by driving systemic change to prevent future tragedies and strengthen protections for all older and at-risk adults.

WI EDRT Vision Statement

The WEDRT aims to drive systemic change by making recommendations to enhance the protection of individuals from abuse and neglect, including proposing modifications to statutes, rules, training, policies, and procedures.

WI EDRT Objectives

- Develop education, prevention, and potentially prosecution strategies.
- Improve coordinated services for families, the elder, and dependent adult populations.
- Identify trends of elder or at-risk adult deaths happening in Wisconsin.
- Collaborate quarterly with other state, regional, and/or county EDRTs.
- Meet regularly as a local team.

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BUILDING YOUR TEAM

Common Membership

The EDRT core membership should consist of multi-disciplinary members who work collaboratively to review cases to determine what can be done collaboratively to prevent future tragedies. EDRT group support may also help to reduce secondary trauma effects that can be associated with challenging cases (2016).

It is also helpful to analyze individual agency roles, how the agencies work with their clients and other agencies involved in the system, and identify any gaps in service and any areas needed for increased collaboration or networking to increase your system's capacity to protect older and vulnerable adults from abuse and neglect. Please reference the **Adult Protective Services and Multidisciplinary Partnerships* for descriptions of the role of each organization/agency.

Adult Protective Services (APS) plays an essential role in the comprehensive response to neglect, abuse, and exploitation of adults. Consequently, the inclusion of APS representatives in multidisciplinary teams such as EDRTs is deemed indispensable (Breckman et al., 2020).

EDRT Coordinators can meet with prospective members individually or present information in a meeting to articulate the need, purpose, and benefits of an Elder Death Review Team. As they may wish to recruit some members from their county's Interdisciplinary Team (I-Team), EDRT Coordinators may wish to request time to present during the next I-Team meeting. The **Wisconsin EDRT PowerPoint* can be used for formal presentations.

Common Wisconsin EDRT Membership Include

- APS
- Ombudsman
- Behavioral Health Services
- Civil Legal Service Providers
- Public Health Agency
- Managed Care Organizations
- Hospital Professionals/Hospital Discharge Planner / Director of Social Services
- Domestic Violence Service Providers / Sexual Assault Program
- District Attorney's Office
- Wisconsin DOJ
- Aging Services
- Facility Regulators
- Coroner/Medical Examiner/Forensic Pathologist
- Emergency Management or Emergency Medical Services
- Geriatrician

Suggested Membership

Your EDRT may want to consider adding the following organizations based on the needs of your community.

- Housing/HUDD
- Corporation Counsel
- Animal Protection
- Guardian ad litem
- Disability Services
- Elder Law/Legal Aid
- Emergency Services
- Forensic Psychiatrist
- Forensic Toxicologist / Pharmacologist
- Funeral Home Director
- Gerontologist
- Hospital Discharge Planner
- Legislator
- Forensic Accountant
- Other Health Care Providers
- Probation and Parole
- Public Guardian and/or Conservator
- Social Security Administration
- Banking Regulators
- judge
- Victim Assistance Program
- Veteran Services

Coordinator(s) Responsibilities

For sustainability, teams are encouraged to have two passionate team leaders that can share the following responsibilities:

- Recruiting members
- Onboarding new members
- Distributing and collecting **Memorandums of Understanding (MOUs)*
- Distributing and collecting **Confidentiality Forms*
- Scheduling meetings (in-person, hybrid, online)
- Creating and sending **EDRT Agendas*, minutes, and announcements
- Managing data collection forms, **Case Review Forms*, and annual reports; Coordinators may opt to utilize the **EDRT Tracking Spreadsheet* can assist for data collection
- Choosing cases for review and managing the distribution, collection, and disposal of review documents

- Running the meeting to include presenting case, speaker, or other information and facilitating the discussions
- Creating a safe environment for members to share without fear of blame
- Focusing on identifying gaps and improving communication and response
- Serving as a spokesperson for the team

A more comprehensive **Department of Justice MDT Coordinator* list of responsibilities and leadership qualities can be found in the resource section of this toolkit.

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NEW MEMBER ONBOARDING

Member Recruitment

Team members should be respected professionals in their field, possessing the capability, readiness, and determination to thoughtfully evaluate and provide constructive feedback on current policies, practices, or programs.

The level of formality in your EDRT is determined by community engagement. Understand that membership may wax and wane and it is okay to start small. Use unfortunate community events to promote the importance and impact of the team. Be intentional about the community driving the team. You may want to consider a Needs Assessment to identify community factors that will help drive support and participation.

Consider the following when selecting an agency and appropriate staff member:

Agency:

- Recognized for delivering high-standard services
- Known for establishing effective collaborations
- Focuses on a specific issue, population, or delivers services/strategies essential to overdose prevention efforts
- Actively participates in public policy or advocacy initiatives

Staff Person Attending the Review:

- Respected and knowledgeable about a particular system, policy, topic, or target group
- Has the availability to attend meetings and engage in follow-up activities
- Experienced in analyzing broader challenges and evaluating organizational practices or community-wide initiatives
- Holds decision-making power within the agency or has direct connections to key decisionmakers
- Comfortable providing constructive feedback and raising critical questions in a nonjudgmental manner

(Emer & O'Brien, 2020)

Below are some resources to assist in the recruitment process. Resource items, including website URLs, are found at the end of the Toolkit; these contain an asterisk (*) and are *italicized*. Descriptions of each are included in the [Resources](#) section of this toolkit.

- | | |
|---|--|
| ➤ Share EDRT mission/vision/objectives/disclaimer | ➤ <i>*Benefits of an Elder Death Review Team</i> |
| ➤ <i>*Elder Abuse Fatality Teams</i> (Costello, 2023) | ➤ <i>*Overcoming the Reluctance or Refusal to Serve on the Team</i> (Stiegel, 2019). |
| ➤ <i>*Wisconsin EDRT Overview PowerPoint</i> | ➤ <i>*Recruitment Invitation Letter</i> |
| ➤ <i>*EDRT Recruitment/Event Flyer</i> | |

Member Onboarding

To onboard new members, cover the basics of your EDRT. Review where members may locate resources and collect appropriate confidentiality paperwork such as the **Memorandum of Understanding (MOU)* AND **Confidentiality Form*.

Below is a suggested onboarding agenda for new members:

1. Signed **Memorandum of Understanding (MOU)* and **Confidentiality Forms*
2. Present EDRT History, Need for EDRTs in Wisconsin, Mission, Vision, and Objectives
3. Describe the organizational structure of your EDRT
4. Provide and review **The Role of EDRT Members*
5. Provide and review **NCEA Adult Protective Services and Multidisciplinary Partnerships*
6. Provide and review **The Department of Justice Glossary of Terms*
7. Discuss and review policies and procedures
8. Review **Elder Death Review Team Members' Guiding Principles* checklist to discuss appropriate member protocol
9. Describe case eligibility criteria
10. Describe how cases are investigated
11. Describe the case referral, case review, and case follow-up processes. Coordinators may want to use the **Case Referral Flow Chart* and the **Case Review Flow Chart*.
12. Describe channels of communication

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EDRT MEETINGS

Meeting Structure and Protocol

The EDRT Coordinator(s) assume(s) leadership responsibilities for the team, such as mobilizing resources, fostering communication among all team members, and serving as a primary point of contact for professionals seeking support with elder death review cases. This involves tasks like selecting cases for team consideration based on factors like severity, urgency, and complexity; leading team gatherings; organizing information for case presentations and action plans; and addressing the team's data management and administrative requirements. Additionally, some coordinators offer case consultations, conduct training, and aid team members in preparing for case reviews (Breckman et al., 2020). See **Coordinator Checklist* for additional roles and responsibilities of the coordinator.

The EDRT coordinator distributes the meeting **EDRT Agenda* to members at least **one week** before the meeting. The coordinator should provide clear information to presenters about the team's **Case Review Process* and offer both emotional and technical support. If the meeting will be held virtually, reference the **Zoom Tutorial* pdf or **Teams Tutorial* pdf to assist in troubleshooting potential issues.

When first creating an EDRT, it is recommended to focus on building your team and developing rapport before reviewing cases. During this time, members can share and learn about the different roles and responsibilities of each participating agency or organization and work to fill any identified gaps in membership. Reference the **Adult Protective Services and Multidisciplinary Partnerships* for descriptions of common EDRT members. The **EDRT Tracking Spreadsheet* will be helpful in tracking membership and identifying the team's membership gaps.

Once established, your team should review one to two cases per meeting. Presentations are also beneficial to members to better understand the function of other agencies, trends in elder death investigations, and efforts to improve prevention and response.

Please see the 'Education' portion of this Toolkit for potential topics for continued education.

Suggested Meeting Structure:

1. Start Meeting (Introductions, admit participants, etc.) See **Zoom Tutorial* and **Teams Tutorial* if needed. If in person, have members sign in using the **Sign-in Sheet*.
2. Share the following via PowerPoint and read aloud as a reminder:
 - Mission and Vision Statements
 - EDRT Objectives
 - Confidentiality Reminder--Guests should fill out a **Confidentiality Form*
 - Remind the team that the objective is to learn and prevent future deaths—not to place blame
3. Member updates
4. Previous case report(s)
5. Presentation and/or Case Consultation (**Case Review* – 1-2 cases per meeting)
6. Track cases and notes on the **EDRT Tracking Spreadsheet*
7. Housekeeping items, such as announcements for the next meeting
8. Adjourn

Education

In addition to case review, meetings may contain educational components by members or visiting presenters. Keeping team members up to date on relevant trainings, legal changes affecting their professions, and new initiatives aimed at preventing adult deaths or injuries is essential to the success of any review team.

Offering brief presentations and distributing helpful materials on a regular basis can support the team's overall effectiveness. Additionally, maintaining communication with other teams to exchange ideas and learn about innovative practices is highly encouraged (Stiegel, 2019).

Below are some suggested topics for team education:

- Agency Education
- Hospice Care Issues
- Secondary Post Traumatic Stress
- Stress Management / Self Care
- Wellness Checks + 14th Amendment
- Mental Illness
- Death & Dying
- Secondary Trauma
- Grief in the Workplace
- Medical Training
- Managed Care
- Self-determination

Evaluation Process

To ensure the team is meeting the needs of its members and continues to run efficiently, it is important to have members complete a team evaluation on a regular basis. Depending on how often your team meets, you may opt to provide evaluations twice the first year and then on an annual basis.

Evaluations should take approximately 2 to 5 minutes to complete and can be conducted via survey platforms such as [Survey Monkey](#), [Doodle](#), [Qualtrics](#), etc. for quick and anonymous tracking. The **Elder Death Review Team Evaluation Form* can be used as is or as a template to create team's evaluation.

To foster transparency, chairpersons should share the evaluation results with the team. The evaluation results should be used to enhance the team's future efforts, and the chairpersons may want to discuss how changes can be made to meet the identified gaps and needs that the evaluation highlighted.

Emotional Impact

Engaging in fatality reviews can be emotionally taxing by nature as examining the circumstances surrounding a death often involves confronting histories of abuse, neglect, conflict, or violence. For

professionals committed to serving and safeguarding their communities, this process can lead to secondary traumatic stress or compassion fatigue.

To help manage the emotional challenges involved, teams should adopt formal policies that encourage healthy coping strategies and create structured spaces for members to express their emotional responses. These supports should include:

- Ongoing education about compassion fatigue and guidance on self-monitoring;
- Regular team debriefings to openly discuss and process difficult experiences;
- Encouragement of self-care practices, such as maintaining a balanced diet, staying active, and prioritizing rest and relaxation;
- Clear pathways to local mental health or professional support resources for team members needing additional help.

(Tingley & De Silva, 2020)

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CASE REFERRAL

Case Referral Process

Anyone can submit a case referral to the Elder Death Review Team (EDRT). Upon receiving a referral, the EDRT Coordinator/Chairperson will conduct an initial case screening. This includes reviewing Adult Protective Services (APS) databases and consulting with the Medical Examiner's Office. The **Case Referral Form* can assist in the case triage process and also assist the EDRT coordinator/chairperson with preparation for the case review.

Cases may be considered for review if the circumstances suggest that an adult at risk interacted with multiple service systems which, collectively, failed to prevent the death. These cases often highlight opportunities for system-level improvement and coordination. Cases where the decedent was in Managed Care should also be prioritized as only Managed Care will have access to the client's information once they are deceased; members will want to record case details while they can best recall the information.

Case Selection Criteria

A case may be appropriate for review if it meets one or more of the following conditions:

- ☐ There was a missed intervention opportunity.
 - ☐ The individual had contact with APS, Behavioral Health Services (BHS), or a publicly funded long-term care program.
 - ☐ There was a recent (within 12 months) APS report or EMDT staffing.
 - ☐ The individual was involved with multiple service systems (e.g., APS, housing, BHS, healthcare, etc.).
 - ☐ The death was determined to have an unnatural cause.
 - ☐ Current or more recent cases will be prioritized over older ones.
- If the decedent was in Managed Care, prioritize the case to ensure member recollection is current in case Managed Care is unable to attend the review.

Referral Process

- ☐ **Case Referral Form* is completed and submitted to the EDRT Chairperson
- ☐ All referrals are reviewed using the Case Selection Criteria above to assess for appropriate multidisciplinary engagement and system involvement.
- ☐ The EDRT Coordinator/Facilitator ensures relevant data systems are checked to determine case suitability.
- ☐ Collaboration and input from key stakeholders are encouraged to support a comprehensive and informed review.

(LaCaze & Flater, 2023)

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Case Referral Flow Chart

The Elder Death Review Team (EDRT Case Review Flow Chart outlines the case referral and selection process. Team coordinators/chairpersons may make adjustments to the process based on their team's capacity and preferences.



CASE REVIEW

Case Selection

When selecting from multiple cases, it is recommended to review summary data on elder deaths that may include year-to-date totals compared with previous years, as well as the distribution of deaths by sex, age group, race and ethnicity, location (such as county or municipality) and any emerging trends such as increase in deaths related to abuse or neglect, or higher rates among isolated or underserved populations.

The most timely and accurate source of elder death data is typically the medical examiner or coroner's office. Whenever possible, at least one EDRT member should have access to this data.

Member agencies of the EDRT may request that specific cases be reviewed to explore potential system gaps, interagency coordination, or internal policy and practice concerns.

To build team comfort and consistency with the review process, it is advisable to start by reviewing one case per meeting. As the team gains experience and capacity, it may be possible to increase this to two or three cases per session. This allows adequate time for thorough discussion, identification of risk and protective factors, and development of recommendations.

Before selecting a case for review, consult with the medical examiner or coroner to confirm that the cause and manner of death have been finalized. It is also important to check with law enforcement to ensure that the case is not part of an active investigation (Emer & O'Brien, 2020).

The EDRT Coordinator/Chairperson completes the **EDRT Meeting Summary* form that contains general information for each case to be reviewed. This form should be completed and distributed to EDRT members two to three weeks prior to the EDRT meeting so members can conduct a search of their records for relevant case information.

Case Review Benefits

Reviewing elder death cases through a fatality review process offers vital benefits for communities committed to preventing future tragedies. Rooted in a public health approach to prevention, elder death reviews provide an evidence-based means to examine system responses to abuse, neglect, and exploitation by agencies, institutions, and organizations.

The mission of this work is prevention, and its purpose is to save lives—**not to assign blame**, but to evaluate systems in a nonjudgmental and constructive way. When implemented effectively, fatality reviews foster a deeper understanding of the circumstances surrounding elder deaths, clarify the roles and policies of participating entities, and enhance collaboration among stakeholders.

These reviews result in data-driven findings and actionable recommendations that spotlight system gaps and critical intervention points. Ultimately, elder death reviews lead to informed system

reforms, improved community responses to elder abuse, and stronger efforts to educate, protect, and promote the well-being and safety of older adults (Tingley & De Silva, 2020).

In addition to identifying systemic gaps, elder death reviews often bring forward previously unrecognized forms of abuse or neglect. As team members discuss individual cases, the collaborative nature of the process may surface new concerns. These insights emerge through open dialogue and the sharing of observations across disciplines, enriching the team's understanding of the circumstances leading to an elder's death.

The multidisciplinary structure of the review team allows members to learn from one another, enhancing both individual expertise and overall team effectiveness. By drawing on diverse perspectives, the team gains a more holistic view of each case. Information sharing not only prevents duplication of efforts but also promotes innovative problem-solving and encourages continued collaboration between meetings. The strong interagency relationships ultimately support more comprehensive responses to elder abuse and neglect (*MDT Guide and toolkit* 2016).

Case Review Process

Case Review

Elder Death Review Teams play a vital role in identifying systemic gaps and enhancing services for individuals whose deaths may be linked to elder abuse. Following the referral process, the team chairperson(s) will facilitate a structured review process that includes the following steps:

Pre-Review Activities:

- ☐ Collect **Case Referral Forms* from members and determine which case(s) will be reviewed and which meeting they will be presented.
- ☐ Distribute the Medical Examiner's report to the team via email, ensuring that personally identifiable information is limited in accordance with the NASW Code of Ethics.
- ☐ Review the team's mission, goals, and confidentiality expectations.
- ☐ If the decedent was in Managed Care, invite Managed Care to attend the meeting as APS does not have access to Managed Care records once the client is deceased. Prioritize the case to ensure member recollection is current in case Managed Care is unable to attend the review.
- ☐ Provide a summary of the decedent's demographic information and general incident information utilizing the **EDRT Meeting Summary*.
- ☐ Utilizing the **EDRT Case Review Worksheet*, members search their records for pertinent case information in preparation of the meeting. Members send the Coordinator/Chairperson the Worksheet prior to the meeting.
- ☐ Present a summary of the agencies involved in the case.
- ☐ Team Chair or recorder may compile case facts early before the first case review meeting.

Team Discussion:

- ☐ Facilitate group discussion of the case, focusing on system-level issues and potential interventions.
- ☐ Using data compiled by team members, team may create a timeline.
- ☐ Document data and team discussion on the **Case Review Summary*.

Post-Review Activities:

- ☐ Document the discussion and summarize key findings and system gaps identified by the team using the **EDRT Tracking Spreadsheet Case Review* tab.
- ☐ Gather data related to potential opportunities for intervention, advocacy, and service improvement.
- ☐ Team and/or Chairpersons may decide to revisit past cases if more information is discovered or if other similar cases present themselves.

(LaCaze & Flater, 2023) (Norling et al., 2009)

The above **EDRT Case Review Checklist* is available as a resource for team Coordinators/Chairpersons to check off as tasks are completed.

Information Routinely Collected and Recorded About a Case:

- ☐ Narrative (What happened?)
- ☐ Demographic of the client
- ☐ Case Timeline (What is currently happening to resolve the case?)
- ☐ Information about the alleged abuser(s)
- ☐ Finances of the deceased
- ☐ Medical assessment
- ☐ Psychological assessment
- ☐ Personal statements from witnesses and/or alleged abuser(s)

(2021)

Six Steps to Effective Reviews

1. Share, question, and clarify all case information
2. Discuss the investigation
3. Discuss the delivery of services
4. Identify risk factors
5. Recommend systems improvements
6. Identify and take action to implement prevention recommendations

(Covington et al., 2005)

In the review process, consider self-determination when assessing client's understanding of risk in terms of prevention. Self-determination is the ability to make your own choices, set your own goals, and manage your own life, taking responsibility for your actions and their consequences. It is about being in control of your life, rather than feeling like others are making decisions for you.

Key aspects of self-determination:

- **Choice-making:** Being able to select options and make decisions that align with your needs and goals.
- **Goal-setting:** Identifying what you want to achieve in life and developing a plan to reach those goals.
- **Problem-solving:** Finding solutions to challenges and obstacles that arise in your life.
- **Self-awareness:** Understanding your strengths, weaknesses, interests, and values.

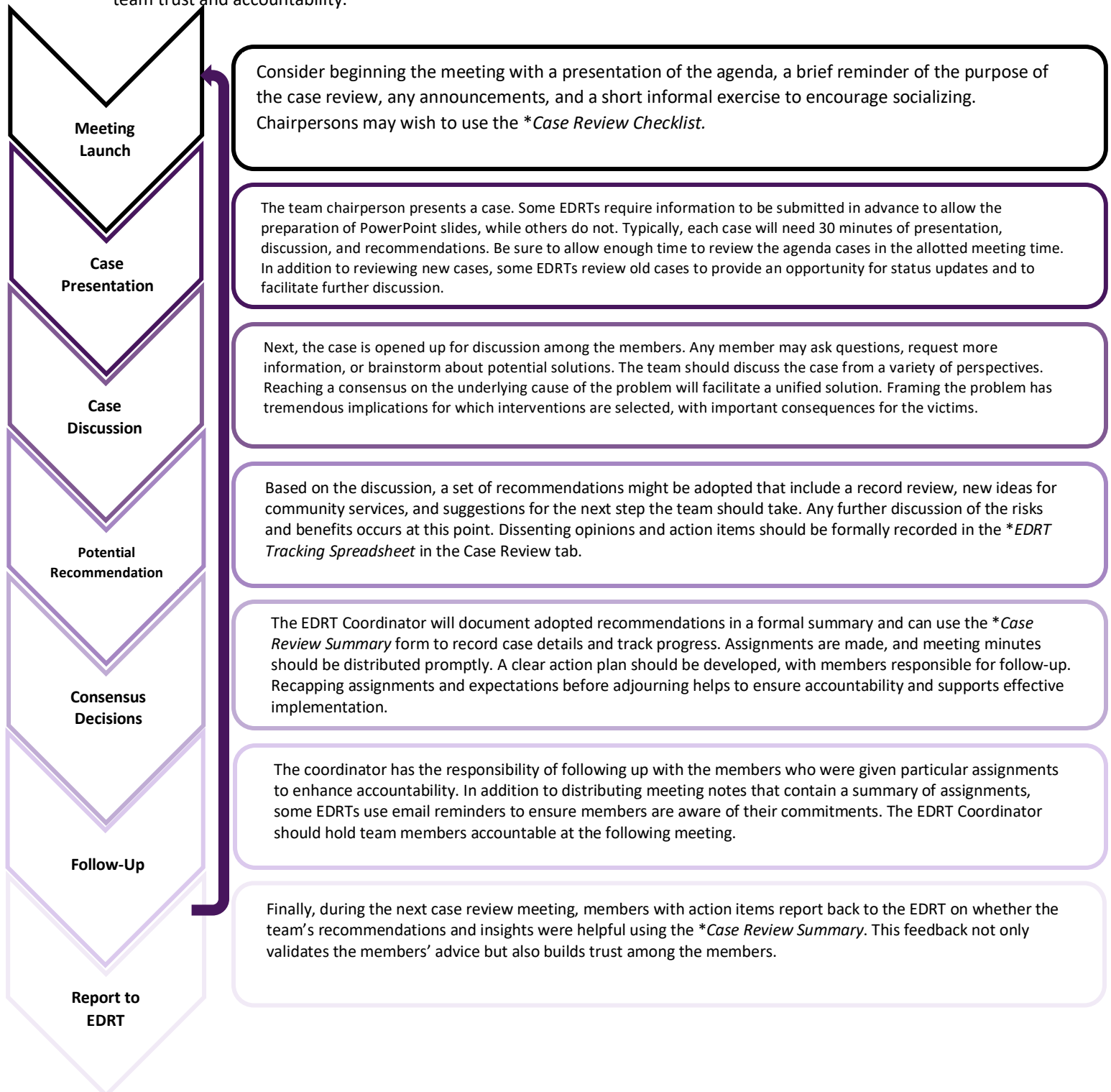
- **Self-advocacy:** Being able to communicate your needs and rights effectively.
- **Taking responsibility:** Acknowledging and accepting the consequences of your choices and actions.

Remember, individuals have the right to make poor choices. Even if they are choices we would personally not make.

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EDRT Case Review Flow Chart

The Elder Death Review Team (EDRT) Case Review Flow Chart outlines a structured, collaborative process designed to analyze and address elder abuse-related deaths. This process ensures ongoing improvement and reinforces team trust and accountability.



RESOURCES

*Available Resources

Resources are identified throughout the Toolkit using an asterisk (*) and are *italicized*. Below is a comprehensive list of the resources found at the end of the Toolkit. Resources are available in the corresponding folders in a zip file that can be downloaded on the [Wisconsin Elder Justice Coalition website](#).

Membership, Recruiting, and Chairperson Materials

- **DOJ Coordinator Checklist** – suggests coordinator tasks before, during, and after meetings.
- **EDRT Benefits Flyer** – highlights the benefits to both EDRT members and the community. This fillable form allows the team coordinator to type in their contact information.
- **EDRT Tracking Spreadsheet** – A spreadsheet for Coordinator(s) to track team membership, contact information, onboarding document distribution, attendance, presenters, and case reviews.
- **Elder Abuse Fatality Teams** – An article written by Erica C.R. Costello describing Elder Abuse Fatality Review Teams (EAFRTs) and their benefits, including preventing premature deaths.
- **Overcoming the Reluctance or Refusal to Serve on the Team** – a resource containing common concerns potential members may have about joining a team and suggestions on how to navigate them.
- **Recruitment/Event Flyer** – a fillable flyer for teams to use to promote their events and/or to recruit team members.
- **Recruitment Invitation Letter** – a fillable form to personalize for your local team to recruit members.
- **Wisconsin EDRT PowerPoint** – a presentation that includes the EDRT Mission, Vision, and Objectives along with the need and benefits of an EDRT in Wisconsin that can be used for new member recruitment and orientation.

Onboarding/Reference Materials

- **Adult Protective Services and Multidisciplinary Partnerships** – This resource contains frequent APS collaborators on MDTs along with a description of each.
- **Department of Justice (DOJ) Glossary of terms** – This glossary contains common terms and definitions used in multidisciplinary teams such as EDRTs.
- **Elder Death Review Team Members' Guiding Principles** – This resource from the *Family and Intimate Partner Violence Fatality Review* adapted from *The Hennepin Domestic Fatality Review Team* lists appropriate protocol for Elder Death Review Team members. Chairpersons can review the protocol during the member onboarding and may wish to revisit the document annually as a refresher for all members.
- **Memorandum of Understanding (MOU)** – a fillable document to personalize for your local EDRT members to complete.
- **The Role of EDRT Members**—This form summarizes common EDRT members and how their expertise and resources uniquely contribute to the team.

Meetings

- **DOJ Coordinator Checklist** – this resource from the Department of Justice *MDT Guide and Toolkit* provides guidance on chairperson tasks to be completed before, during, and after team meetings.
- **EDRT Agenda Template** – A Fillable template to personalize for your local FAST meetings.
- **EDRT Evaluation Form** – A list of statements to ensure chairpersons are meeting the needs and goals of their EDRT and its members. The form can be downloaded and used in paper form, or used as a template to create an evaluation that better compliments the team and community. The questions can be imported into an online survey such as Survey Monkey, Doodle Polls, or Qualtrics if a digital version is preferred.
- **EDRT Meeting Power Point Template** – A Wisconsin EDRT branded Power Point template containing pages for Mission, Vision, Objectives, Confidentiality reminder, Case Review pages, and Educational Components.
- **EDRT Meeting Sign-In Sheet** – a printable sign-in sheet containing the Confidentiality Agreement for in-person meetings.
- **Confidentiality Agreement in Zoom** – Directions on how to create a confidentiality agreement that members need to check prior to be admitted into the EDRT meeting.
- **Confidentiality form** – a fillable form for EDRT guests to complete to protect the client's confidentiality.
- **Microsoft Teams Tutorial** – an information/troubleshooting guide for Teams to assist with virtual or hybrid meetings.
- **Zoom Tutorial** – an informational/troubleshooting guide for Zoom to assist with virtual or hybrid meetings.

Case Referral and Review

- **Case Referral Form** – a fillable form to be completed for case reviews, and submitted to the team chairpersons for consideration. Team coordinator/chairperson will prioritize cases with connecting themes. Cases where the decedent was in Managed Care should also be prioritized as only Managed Care will have access to the client's information once they are deceased; members will want to record case details while they can best recall the information.
- **Case Referral Flow Chart**—A visual of the EDRT case **referral** process.
- **Case Review Flow Chart** – A visual of the EDRT case **review** process with a clarifying paragraph for each step.
- **Case Review Summary**—a fillable form to be completed during the case review to document data along with team suggestions.
- **EDRT Case Review Checklist**—this checklist can be used by team Coordinators/Chairpersons to check off pre-review, team discussion, and post-review case activities to ensure all steps are followed by selecting the checkboxes as tasks are completed. This is especially useful to new Coordinators/Chairpersons.
- **EDRT Case Review Worksheet**—this fillable form is used by EDRT members to collect pertinent case, victim, and (alleged) perpetrator information. Members send a copy of the EDRT Coordinator/Chairperson the completed form prior to the meeting so they may compile relevant data for the case review. Members complete the worksheet as best they can with the information to which they have access. The more data collected and shared, the more comprehensive the case review. Chairpersons should consider their team's involvement prior to asking them to complete the

worksheet. Although the worksheet is helpful in data collection, some teams may decide on a less formal approach to data collection and case review.

- **EDRT Meeting Summary**—The chairperson(s) complete this form with general case details that will be reviewed and distributes to EDRT members two to three weeks prior to the meeting so members can collect pertinent case information prior to the meeting.
- **EDRT Tracking Spreadsheet/Case Review Tab**—Team Chairpersons can track cases reviewed by the team in the Case Review Tab of the EDRT Tracking Spreadsheet from the ‘Membership, Recruiting, and Chairperson Materials’ section of these resources.
- **DOJ Ground Rules During Case Review** – This is a list of case review ground rules for multidisciplinary teams to consider for case reviews. This resource is more in-depth than the **Elder Death Review Team Members’ Guiding Principles* to be used in conjunction or independently.

General Information

- **EDRT Evaluation Form** – a list of questions that can be used to assess your EDRT regularly as determined by your team. The form can be downloaded and used in paper format, or the questions can be imported into an online survey such as Qualtrics, Survey Monkey, or Doodle Polls.
- **Elements in a Standard Elder Death Scene Form** – This fillable or printable form is used as an investigation tool. General data collected on this form will benefit the team during case reviews (Julie et al., 2014).
- **DOJ Ethical and Legal Considerations** – This document includes information on confidentiality, MOU’s, and cultural competency for your team to consider as the protocol is established.
- **Legal Action of Wisconsin Referral Form** – used to request services. Legal Action of Wisconsin helps clients who have been victims of domestic violence, crime, elder abuse, sexual assault, and human trafficking protect their rights and secure support and protection. See Legal Action of Wisconsin website for more information. The main intake line is 855-947-7529 and is staffed 9 a.m. – 4 p.m. (CST) M-F <https://legalaction.org/>

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