



Options Counseling Tip Card

☐ **Identifying Need (I&A)**

- ☐ Recognize need
- ☐ Willing to proceed with OC
- ☐ Communication needs

☐ **Welcome (OC)**

- ☐ Warm and inviting greeting
- ☐ Clarify role
- ☐ Review confidentiality

☐ **Discovery (OC)**

- ☐ Legal decision maker
- ☐ Concerns and needs
- ☐ Urgency
- ☐ Strengths/challenges
- ☐ Values/preferences/goals
- ☐ Family and friends
- ☐ Lifestyle
- ☐ Current living situation
- ☐ Health conditions
- ☐ Current services/supports
- ☐ Services/supports tried

☐ **Decision Support (OC)**

- ☐ Identify resources
- ☐ Prioritize resources/costs
- ☐ Identify benefits/limitations (pros/cons)
- ☐ Narrow options
- ☐ Review/summarize discussion
- ☐ Readiness to create a plan

☐ **Action Planning (OC)**

- ☐ Create Action Plan (AP)
(what/who/when)
- ☐ Assess plan and confidence level
- ☐ Establish time/date for follow-up

☐ **Follow-Up (OC/FU)**

- ☐ Update on situation/progress on AP
- ☐ Re-engage in Discovery/Decision Support, if needed
- ☐ Discuss modifications to AP, if needed
- ☐ Schedule another follow-up, if needed, **or**
- ☐ Conclude OC, as appropriate

ADRC-004 (06/2025)



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