

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

F-00780 (09/2020)

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