

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)**
 - 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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