



Options Counseling Tip Card Supplement

Questions, Reflections and Affirmations

Introduction

This document is designed to supplement the Options Counseling Tip Card. It provides ADRC staff sample phrases to support their professional practice.

This project was supported, in part by grant number 90RO0027-04-05 from the U.S. Administration for Community Living, Department of Health and Human Services, Washington, D.C. 20201.

Welcome

Clarify role

- I am so glad you called.
- If it is okay with you, can I let you know what the ADRC does?
- Could I describe my role as an information and assistance specialist?

Empower *(customer is in charge)*

- It sounds like placing this call was difficult for you. I am glad you called.
- Please know I am not here to talk you into anything, we are just having a conversation. Any decisions to be made are yours to make.

Review confidentiality

- What you tell me will be kept private. I will only share what you tell me to, and if you give me permission.

Discover and Gather

Intent *(reason for calling)*

- If it is okay with you, I'd like to ask you some questions to help me better understand your situation.
- What brought you here today? or Why did you decide to call us?
- What is your top priority for today?
- What can I help you with today?

Urgency

- Is this something that has concerned you for a while?
- How quickly do you need help?
- How soon do you think you might want to act on this or take some next steps?

Challenges and strengths

- Your _____ (family and friends) have been really helpful.
- It sounds like this was a shock to you, is that right?
- It sounds like you don't feel help is needed, is that right?
- You've done a lot of thinking about this.
- The research you have already done is really helpful.

Preferences, values, and goals

- This _____ (goal) is really important to you. Did I get that right?
- The most important thing in this decision is _____. Did I get that right?

Options Counseling Tip Card Supplement

Questions, Reflections and Affirmations

Health

- Is there any information about your health that would be important for me to know?
- Tell me about any medications you are taking.

Services tried or currently receiving

- Tell me about services or other help you might have tried or are currently receiving.
- How did that work for you? What is the most helpful thing or least helpful thing about the services you are receiving or received?
- So, the assistance is really helpful?

Family and friends

- Are your family and friends concerned?
- Tell me about the help your _____ (family and friends) provide.
- How is that working?
- Are family and friends able to help?
- So the help from your family and friends means a lot to you, but you see they are getting tired or stressed?

Finances: income and assets

- Some services that we may talk about have fees. It will be helpful to learn if paying for services is a concern or if the cost seems workable as we discuss some options.
- Can we talk about your ability to pay for the help you are interested in?
- Saving money is important to you. It is difficult to think about spending some of your savings.

Employment

- Do you currently work?
- Is working or volunteering a goal?
- I understand that getting back to work is important to you. Did I get that right?
- What do you like the most or miss the most about _____ (working and volunteering)?

Resources and Decision Support

Research options *(use database)*

Prioritize

- Out of all of the services (tasks) we've talked about, which one would you like to learn about first?
- Are there one or two services (tasks, options) that you would like to focus on today?
- We've talked about a lot of choices, where would you like to start to narrow this down a bit?
- What feature is most important to you?

Explore options and costs

- We've talked about _____ service. Would it be helpful if I shared the usual costs or range of typical costs for this service?
- Sometimes the cost of services can be higher than what people might think.
- Is the cost a concern to you?



Options Counseling Tip Card Supplement

Questions, Reflections and Affirmations

Explore pros and cons

- What do you like most about this choice and what most concerns you?
- Sorting through choices can be difficult. However, it sounds like you are getting closer to what might work best for you?

Evaluate options (*the “why”*)

- Tell me why this is the best fit for you?

Action Plan and Summary

Review and summarize conversation

- So far we’ve talked about ____ and _____. What do you want to do first?

Outline next steps—*who, what, when*—use *Next Steps form*

- What do you think your next step will be?
- How long do you think it will take for this to happen?
- Is there anything I can do that would be helpful?
- How can I assist you to make ____ happen?
- Is there anything (maybe there isn’t) that might get in the way of this happening?

Follow Up

Decide next contact – date, time (*if appropriate*)

- Is it okay with you if I call you in a week or two?

Thank the customer!

- I’m glad we talked, please call back if you have any questions. I am more than happy to talk with you again.

Notes
