**INFORMATION AND ASSISTANCE SUPERVISOR OBSERVATION AND SUPPORT TOOL**

This form should be used with the Information and Assistance Supervisor Observation and Support Tool Guide ([P-03076](https://www.dhs.wisconsin.gov/publications/p03076.pdf)).

| Name – ADRS Specialist | Customer Record Identification |
| --- | --- |
| Click or tap here to enter text. | Click or tap here to enter text. |
| Name – Reviewer | Date of Review |
| Click or tap here to enter text. | Click or tap to enter a date. |

|  |  |  |  |
| --- | --- | --- | --- |
| **Overall**: Attend to necessary considerations throughout customer interaction. | | | |
| **Component** | **Evaluation** | | **Feedback/Notes** |
| Remain sensitive to cultural differences. | Below Requirement (1)  Meets Requirement (2)  Exceeds Requirement (3) | |  |
| Ask about and use communication supports and assistive devices as needed. | Below Requirement (1)  Meets Requirement (2)  Exceeds Requirement (3) | |  |
| Use appropriate non-verbal communication. | Below Requirement (1)  Meets Requirement (2)  Exceeds Requirement (3) | |  |
| **Welcome**: Provide a warm and engaging reception to ADRC customers. (Note: this step may occur before Identifying Need) | | | |
| **Component** | | **Evaluation** | **Feedback/Notes** |
| Offer a warm and inviting professional greeting. | | Below Requirement (1)  Meets Requirement (2)  Exceeds Requirement (3) |  |
| Introduce self, role, and function of the ADRC. | | Below Requirement (1)  Meets Requirement (2)  Exceeds Requirement (3) |  |
| Explain confidentiality. | | Below Requirement (1)  Meets Requirement (2)  Exceeds Requirement (3) |  |
| **Discovery, Identifying Need, and Providing Assistance:** Explore the customer’s needs, preferences, and offer of resources. Understand when options counseling would be of benefit to a customer. | | | |
| **Component** | | **Evaluation** | **Feedback/Notes** |
| Obtain information on customer’s concerns and needs. | | Below Requirement (1)  Meets Requirement (2)  Exceeds Requirement (3) |  |
| Recognize customer’s characteristics or situations where options counseling would be beneficial. | | Below Requirement (1)  Meets Requirement (2)  Exceeds Requirement (3) | *If customer’s needs do not meet criteria for options counseling, then evaluation of this component should be recorded as Meets Requirement (2).* |
| Ascertain customer’s willingness to engage in options counseling, if applicable. | | Below Requirement (1)  Meets Requirement (2)  Exceeds Requirement (3) | *If options counseling was not offered because customer’s needs do not meet criteria for options counseling, then evaluation of this component should be recorded as Meets Requirement (2).* |
| Identify resources that may meet customer-identified needs and preferences. | | Below Requirement (1)  Meets Requirement (2)  Exceeds Requirement (3) |  |
| Present options to customer in a manner that supports customer’s understanding. | | Below Requirement (1)  Meets Requirement (2)  Exceeds Requirement (3) |  |
| Gauge customer’s readiness to move forward or inquire about what additional information the customer may need. | | Below Requirement (1)  Meets Requirement (2)  Exceeds Requirement (3) |  |
| Establish a plan for follow-up, as applicable.  Follow-up offered  Follow-up not offered, not applicable | | Below Requirement (1)  Meets Requirement (2)  Exceeds Requirement (3) |  |
| **Follow-Up:** Reconnect with the customer and verify that the actions taken are meeting the customer’s needs and goals. | | | |
| **Component** | | **Evaluation** | **Feedback/Notes** |
| Request update on customer’s situation and inquire about customer’s progress in following up on information the ADRC previously provided. | | Below Requirement (1)  Meets Requirement (2)  Exceeds Requirement (3) | *If customer declined follow-up, then evaluation of this component should be recorded as Meets Requirement (2).* |
| Assess for the need for options counseling if the customer was unable to act on information previously provided, as needed.  Not applicable | | Below Requirement (1)  Meets Requirement (2)  Exceeds Requirement (3) | *If re-engaging is not needed, customer declines to re-engage, or customer declined follow-up, then evaluation of this component should be recorded as Meets Requirement (2).* |
| Continue to schedule additional follow-up contacts or offer options counseling, or conclude follow-up, as appropriate. | | Below Requirement (1)  Meets Requirement (2)  Exceeds Requirement (3) | *If customer declined initial or future follow-up, then evaluation of this component should be recorded as Meets Requirement (2).* |
| **Additional Comments:** | | | |