**OPTIONS COUNSELING SUPERVISOR OBSERVATION AND SUPPORT TOOL**

This form should be used with the Options Counseling Supervisor Observation and Support Tool Guide ([P-00885](https://www.dhs.wisconsin.gov/publications/p00885.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. |

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| **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) |  |
| 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:** Explore the customer’s strengths, goals, values, needs, and preferences. |
| **Component** | **Evaluation** | **Feedback/Notes** |
| Obtain information on customer’s concerns and needs. | [ ]  Below Requirement (1)[ ]  Meets Requirement (2)[ ]  Exceeds Requirement (3) |  |
| Identify customer’s strengths, goals, values, and preferences. | [ ]  Below Requirement (1)[ ]  Meets Requirement (2)[ ]  Exceeds Requirement (3) |  |
| Learn about customer’s family, friends, lifestyle, and current living situation. | [ ]  Below Requirement (1)[ ]  Meets Requirement (2)[ ]  Exceeds Requirement (3) |  |
| **Decision Support:** Partner with the customer to explore and evaluate programs and services that might meet their needs in the context of their strengths, goals, values, and preferences. |
| **Component** | **Evaluation** | **Feedback/Notes** |
| Identify resources that may meet customer’s 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) |  |
| Facilitate an unbiased discussion about resources to help customer narrow list of options. | [ ]  Below Requirement (1)[ ]  Meets Requirement (2)[ ]  Exceeds Requirement (3) |  |
| Gauge customer’s readiness to move forward.  | [ ]  Below Requirement (1)[ ]  Meets Requirement (2)[ ]  Exceeds Requirement (3) |  |
| **Action Planning:** Identify next steps for the customer and the staff. |
| **Component** | **Evaluation** | **Feedback/Notes** |
| Offer to help customer create written action plan using Action Plan document. Action Plan Elements:[ ]  Customer’s goal[ ]  Actions to meet goal[ ]  Name of agency or support[ ]  Who will complete each action by when[ ]  Steps that need to occur | [ ]  Below Requirement (1)[ ]  Meets Requirement (2)[ ]  Exceeds Requirement (3) |  |
| Help customer assess plan and their confidence in it. | [ ]  Below Requirement (1)[ ]  Meets Requirement (2)[ ]  Exceeds Requirement (3) | *If staff has respected customer’s desire for no written plan at this time, then score on this competency will be recorded as “Meets Requirement.”* |
| Establish a plan for follow-up. | [ ]  Below Requirement (1)[ ]  Meets Requirement (2)[ ]  Exceeds Requirement (3) | *If staff has respected customer’s desire for no follow-up, then score on this competency will be recorded as “Meets Requirement.”* |
| **Follow-Up:** Reconnect with the customer and verify that the actions taken are meeting the customer’s needs and goals.*If customer has enrolled in a publicly funded LTC program, then it is not appropriate to offer follow-up. Check “Customer enrolled in LTC” and score each component of this section as “Meets Requirement.”*[ ]  Customer enrolled in LTC |
| **Component** | **Evaluation** | **Feedback/Notes** |
| Request update on customer’s situation and inquire about customer’s progress on planned action steps. | [ ]  Below Requirement (1)[ ]  Meets Requirement (2)[ ]  Exceeds Requirement (3) |  |
| Re-engage in discovery and/or decision support as needed; discuss possible modifications to Action Plan as needed.  | [ ]  Below Requirement (1)[ ]  Meets Requirement (2)[ ]  Exceeds Requirement (3) |  |
| Continue to schedule additional follow-up contacts or conclude follow-up as appropriate. | [ ]  Below Requirement (1)[ ]  Meets Requirement (2)[ ]  Exceeds Requirement (3) |  |
| **Additional Comments:**  |