



Aging & Disability Resource Centers of Wisconsin

OPTIONS COUNSELING

**Initial Discovery
Training Guide**



ADRC Options Counseling Initial Discovery Training Guide

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The purpose of this training guide is to provide information to support ADRC staff. It is meant to work in tandem with the Initial Discovery Tool and support staff in identifying key phrases, statements, and questions that will help in their work at the ADRC.

Aging & Disability Resource Center



Welcome

Your greeting and introduction to the customer provides an opportunity to make a positive first impression and affirm that the person contacted the right place. This will set the tone for the conversation. Sharing your role early in the conversation can help clarify expectations. Each conversation is different, and each customer is unique. Explaining your role may help if the person is hesitant or concerned about another person.

Sample Opening Statements or Questions

“Thank you for calling; if it's okay I'd like to share a little bit about how the ADRC works. We have lots of information about services and programs in the community. I'll need to learn from you what you are looking for and what makes sense for you. We'll sort through these options together; however, any decisions about next steps are yours. How does this sound to you?”

Skills or Knowledge

ADRC staff who provide Options Counseling suggested the following reminders or considerations to make this step effective.

- Eye Contact (with sensitivity to cultural differences)
- Body language and use of gestures (leaning, nodding, etc.)
- Respect
- If office visit, move to a private room
- Cheerful tone of voice
- Comfortable atmosphere
 - Warm and welcoming, good lighting, distractions eliminated (e.g., noise)
- Gauge information from body language (see above)
- Double check for hearing challenges, use pocket talker as needed
- Gauge whether there is any question about or hesitancy related to accepting services; if so, make a point to clarify your role early in the conversation.
- Reflect and paraphrase
- Use active listening
- Use open-ended questions (what, how, tell me . . .)
- Remember, the customer should do most of the talking, not the ADRC staff.



Discovery

During the Discovery Phase of the Options Counseling process, key information is learned about why the person contacted the ADRC, the customer's values, preferences, resources and supports, and more.

Sample Questions or Statements

- If it's okay with you, I'd like to ask you some questions that will help me better understand your situation.
- What is happening now?
- What brought you here today?
- Have you been to or contacted the ADRC before?
- What is your priority for today?
- Please describe your day to me.
- Tell me how this (the issue or concern) affects your day.
- Who helps you now?
- We have a lot of resources that may be helpful for you.
- What services have you tried or are currently receiving?
- What have you done in the past about this?
- Some of the programs and services have requirements about a person's income and assets.
- Some of the services that we may talk about have fees.
- What are your (friend/family member) concerns? What are your concerns?
- Do you have any health concerns that you think I should know about?
- If a home visit might be helpful, consider stating:
 - This is a lot to talk about, a lot of things are easier to talk about face-to-face.
 - If it's okay with you, we could talk about this more in your home or my office. What would work best for you?
 - Feel free to bring other important individuals to the meeting.

Notes



Skills or Knowledge

ADRC staff who provide Options Counseling suggested the following reminders or considerations to make this step effective.

- Listen without anticipating your next question.
- Gather key information and use open-ended questions.
- Determine urgency.
- Learn about the customers and other individuals in their life, e.g., family or friends. Do they have a different view of the situation?
- Plant ideas about resources; not everyone is ready to act – roll with resistance.
- If talking to the person over the phone, identify early if there is a willingness to have you visit him/her at home and continue the conversation there.
- Pick up on the person's values and preferences to use later during decision support.
 - I want to stay in my own home.
 - The idea of paying for services makes me uncomfortable.
 - My family is key.
 - I want to return to work.
 - Caring for my husband is part of my role as a wife.
- Affirm the individual, reflect back on their strengths.
- Validate that the situation and choices can seem overwhelming.
- Be genuine.
- If conversation takes place in the home, then ask where you should sit.
- Clarify that all information is kept confidential.
- Ask permission before asking questions.
- Identify internal strengths, e.g., “What keeps you going?”
- Identify what has worked in the past.
- Use appropriate assessment tools, memory screening, depression screening, fall risk, and psycho-social assessments.
- Gather information about finances, income and assets as appropriate.

Notes



Decision-Support

When providing decision-support, staff should research options by searching through the ADRC Resource database. Printed material such as fact sheets, brochures, and other materials are gathered at this time.

Decision-support takes place when programs or services are explored that may fit the individual's situation. Evaluation of the pros and cons of each service is discussed; and the values and preferences are applied to the choices. Decision-support leads to an understanding of the "why" – why something is important to the person.

Sample Questions or Statements

- If it's okay with you, I'd like to tell you about a couple of options that might be helpful.
- How does this sound to you?
- Sometimes information about services is confusing. If I say something that isn't clear, then please let me know.
- We've talked about a lot of choices, where would you like to start to narrow this down a bit?
- Out of all we've talked about, what is most important to you?
- We've talked about _____, _____, and _____. Where would you like to start? (Menu of Options)
- What are the good things about this option?
- What are the not-so-good things about this option?
- What do you make of this?
- Is there anything else?
- Remind the individual that this is a process.
- Reflect on values, "I know it's important to you to stay in your own home."
- It's hard when, on one hand, you've saved a long time, and on the other hand, paying for help at home is something you never envisioned. What do you make of this?
- What is the biggest thing that is holding you back?"
 - Is there something else that we haven't talked about yet?
 - If it's okay with you, I'd like to share some ideas for your consideration.
 - What would make things better for you?



Skills or Knowledge

ADRC staff who provide Options Counseling suggested the following reminders or considerations to make this step effective.

- Use information in conversation that ties in with resources.
- Refer to the Elderly or Disability Benefits Specialist (EBS/DBS) and other colleagues as appropriate.
- Assure the person or customer that they “drive the train.”
- Respect the identity of all involved.
- Explain that information shared will be kept confidential.
- Plant the idea about using services on a trial basis.
- Remember, the choices are theirs.
- Eliciting opportunities for reflection will help gain an understanding of what is important in the person’s life.
- Remember to “dose” information and not overwhelm with unnecessary information; do not gather information that is not necessary.
- Use motivational interviewing techniques and strategies.

Notes



Action Plan/Summary

Summarizing the conversation can bring the interview to a close with the identification of next steps or an action plan. What will happen when, and by whom are generally key components of the plan. The action plan does not have to be formal and should match the person's comfort level.

Sample Questions or Statements

- So what happens next? Would you like me to place some calls or do you want to do so? Either is fine with me.
- It seems that we've come to a place where you've made some decisions. Have I got that right?
- Tell me what you think your next step will be.
- Who might help you with this?
- It seems that both of us have some homework.
- How long do you think it will take for this to happen?
- How confident are you that this will happen? (Consider confidence or importance rulers)
- Is it okay with you if I call you in a week or two?
- I'd like to do a little more research on this. Is it okay if I call you in a couple of days?
- Sometimes this application process may take awhile. Is it okay if I get in touch with you in a week or two to learn how it's going?
- Based on what we've talked about, do you have any concerns about what might get in the way of this happening?
- What would need to happen for you to know that it's time to take this step?
- How are you feeling about our conversation/visit?
- Out of everything we've talked about, what was the most important information for you? What was the most valuable?

Notes



Skills or Knowledge

ADRC staff who provide Options Counseling suggested the following reminders or considerations to make this step effective.

- Offering to write out next steps can be very helpful. Some ADRCs keep blank pages in the printed version of their resource directory for this purpose. Other ADRCs use forms to write next steps, then provide a copy for the person and the staff.
- Use of motivational interviewing skills and strategies can be very helpful at this juncture if resistance surfaces around next steps. Assess readiness and remember to “roll with resistance.”
- Remain neutral and supportive.
- Increase your listening skills; reflection of meaning and feelings, and reframing are key ingredients.
- Do more listening than talking.
- Plant ideas for future consideration and discussion.
- Consider that some people think taking or accepting services is an “all or nothing” proposition. Talk about starting small or using the trial basis approach.

Notes



Follow-up

Follow-up provides an opportunity to check back and learn how the individual is doing, what happened or didn't happen, and if anything has changed. Each ADRC has a follow-up policy to serve as a guide so staff can know the situations in which follow-up is appropriate.

Sample Questions or Statements

- Hello, this is ____ from the ADRC. Did I catch you at a good time? I just wanted to check-in after our conversation last week.
- How are things going?
- Was the information I sent you helpful? What did you think about it?
- Thinking back to our conversations, tell me any thoughts you've had since we talked.
- You were going to share the information we discussed with your (family, friend, spouse, etc.). How did that go?

Notes



Skills or Knowledge

ADRC staff who provide Options Counseling suggested the following reminders or considerations to make this step effective.

- Consider re-stating your role as a reminder if appropriate.
- Re-establish rapport.
- Go slowly.
- Use your professional judgment to assess any urgency, or health and safety concerns.
- Complex situations often require follow-up, so eliciting information about the person's priorities is helpful.
- Remember to ask for permission before sharing thoughts and ideas about next steps.
- Research additional options if needed.
- Re-engage in the discovery process and decision-support process as appropriate.

Notes



Wisconsin Department of Health Services

Division of Long-Term Care

Office for Resource Center Development

For more information, visit:

<http://www.dhs.wisconsin.gov/ltcare/adrc>



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