



*Aging and Disability Resource Centers of Wisconsin*

# Information and Assistance Specialist

Information Assistance/  
Options Counseling  
Feedback Tool  
Instruction Guide



## Introduction:

Each Aging and Disability Resource Center (ADRC) strives to provide a consistent high quality customer experience. There are many components to providing individualized, person-centered, Information and Assistance (I&A) and options counseling. This tool ([P-00885A](#)) provides a place and format for ADRC supervisors to document observations of ADRC staff interactions with customers. Since customer interactions generally begin with I&A, the Feedback Tool is flexible and can be used for both I&A and options counseling. The shaded areas that highlight steps in the process that differentiate the more in depth options counseling from I&A. If these options counseling components occur, then options counseling should be reported as an ADRC activity. Coaching provides an opportunity to provide advice, guidance and support as ADRC staff hone their skills.

The tool follows the structure of options counseling beginning with “Welcome” and ending with “Next Steps/Action Plan.” Each section outlines key components that generally occur during that portion of the conversation with the customer. Customer conversations do not happen in a linear fashion. ADRC supervisors who use the tool may need to take notes as they observe the conversation and complete sections as they occur naturally.

In addition to feedback to ADRC staff regarding their interaction with customers, this tool ([P-00885A](#)) provides a mechanism to log feedback and provide coaching on the notes that ADRC staff write about the customer interaction. Documentation of the customer interaction provides a record that is helpful when following-up with customers, when customers re-contact the ADRC, when another person contacts the ADRC on behalf of the customer, and when staff respond to an inquiry from a person who spoke with or met with a colleague. Documentation of the customer contact is also evidence that ADRC Activities have occurred and may be a helpful reference in the event of a customer complaint.

## Feedback Tool Sections:

### Page 1

At the top of page 1, ADRC supervisors indicate the setting of the customer interaction, such as: office, home or other, and note when the conversation occurred. The next section is used to document when the tool was completed, the names of the supervisor, staff and customer. There is also a section on this page for the supervisor to write notes that reflect on the overall experience.

The detail of the tool begins in the middle of this page starting with the “Welcome.” Key components contained in the “Welcome” are listed in this section. No documentation of the “Welcome” is required. However, ADRC staff may choose to document details of this segment of the customer conversation. Supervisors may add information in the section titled “Overall - Areas of Consideration and Coaching.” This is an opportunity to recognize good work or provide support for staff improvement, when needed.

### *General Tips for Positive Coaching:*

- The “Welcome” is an opportunity to begin to develop rapport and build trust by demonstrating kindness, warmth and understanding. Supervisors can support staff by acknowledging how staff have achieved this through their words, tone of voice and other actions.

- Sharing the purpose of the ADRC and the staff’s role with customers helps to clarify the ADRC work and affirms the customer’s role in the conversation. Customers may have a misconception of the ADRC. Sharing the staff’s role clarifies the ADRC responsibilities and assists with the conversation.

## Page 2

This page focuses on the “Discovery” phase of the customer interview. During this phase, key information about the person’s reason for contacting the ADRC and the person’s goal for the conversation is learned. The majority of the components of Discovery require documentation. This requirement is indicated by the use of an asterisk (\*). Use the Documentation section to indicate whether documentation was present (Yes) or not (No) or not applicable (N/A). As in the previous section, there are two options for writing feedback. The first feedback section on the right of the page is used to share thoughts on each of the components. The notes section at the bottom of the page is available for supervisors to write their overall thoughts on this section and identify areas for coaching.

### ***General Tips for Positive Coaching:***

- A result of the Discovery phase is ADRC staff elicit a great deal from customers including their values, preferences, strengths, as well as concerns.
- Supervisors can affirm with staff the importance of the strategic use of open-ended questions, reflections, validating and other skills in this area.
- Staff refrain from “hearing the need and finding the fix” and really listen to the customer before moving on to researching and discussing potential options.
- Supervisors are encouraged to acknowledge when ADRC staff are genuine, patient, maintain a tone of voice that communicates understanding and choose words that are non-judgmental.

## Page 3

This page includes two components of options counseling: Researching Options and Decision Support. As in previous pages, required documentation is indicated by the use of an asterisk (\*), space is provided for supervisors to write specific comments for each component on the right side of the page and overall comments at the bottom of the “Research Options/Decision Support” section.

### ***General Tips for Positive Coaching:***

- Services, supports and programs change over time. ADRC staff conduct research to learn details of the full scope of potential services and supports that may be helpful for each customer.
- Supervisors validate staff taking time with the customer to learn his/her thoughts and views on the services presented. A key take-away from this section is being able to clearly and accurately reflect, from the customer’s perspective, the benefits and drawbacks of the various choices.

- Decision support occurs within options counseling. Choices are narrowed based on the person's values and preferences learned during the Discovery phase. Staff use open-ended questions to ask customers whether the services discussed, fit with their preferred lifestyle. Supervisors listen for staff's use of clear, jargon-free language to describe services, as well as reflections that contain information about the customer's individual views or concerns about each service discussed.
- Supervisors encourage staff to describe the types of services in addition to the different features of these services. This includes the cost of services and learning the amount the customer may be able to spend. The potential frequency of the service (trial basis vs. short or long-term), as well as the setting of the service, or if the customer has friends and family that can help are additional factors. Some customers can be overwhelmed by their own situations and decisions regarding the available options.
- Staff may work with people who are conflicted about the decisions. For example, a customer wants to stay in his/her own home, but the idea of having strangers in their home or paying for services is uncomfortable. Family members may want something different from the customer's preferences. Reframing these discrepancies takes skill and using motivational interviewing strategies such as decisional balance may help. Supervisors acknowledge when staff highlight and reframe the discrepancies without judgment and truly elicit the customer's thoughts.

## Page 4

The last page of the **In-Person Feedback and Documentation Review Tool** contains two sections. The first section of the page includes the "Next Steps/Action Plan" components. In this section, supervisors write specific feedback in the space provided on the right side of the page and overall comments in the middle of the page.

The last section of this page is used to document whether a home or office visit or follow-up was offered. If enrollment counseling or a functional screen was scheduled, then that should be documented here as well. Finally, the ADRC Activities that occurred during the customer interaction should be noted on the list of activities shown.

### ***General Tips for Positive Coaching:***

- Some customers may be interested in learning about services, but are uncertain whether it is time to act. ADRC supervisors have an opportunity to reaffirm with staff to learn the customer's time line for making a decision, determine whether the customer is missing information that may be needed to make a decision, and any factors that might hinder the customer accessing help needed.
- Offers of assistance with next steps are made during this time. Supervisors can validate how staff make this offer and still acknowledge or support the person's autonomy.
- Follow-up is a key driver of customer satisfaction. Supervisors can acknowledge when follow-up occurs according to ADRC policy.