### Welcome:
The greeting and initial minutes of the customer interview set the tone for the conversation and the foundation for building rapport.

- Professional greeting, warm tone of voice, kind, courteous.
- Shares role with the customer.
- Informs the customer that information shared is confidential.

### Overall – Area of Consideration and Coaching:
**Components – In-Person Feedback**

Discovery: During this phase in the Options Counseling process, key information is learned about the reasons the person contacted the ADRC and what the person's goal is for the conversation.

- Continues to develop rapport.
- Learns the reason for the contact and whether the concern is urgent (e.g., customer's timeline for making a decision).*
  - Yes
  - No
  - N/A
- Uses open-ended questions to learn the customer's values, preferences, strengths/challenges (uses Motivational Interviewing skills).*
  - Yes
  - No
  - N/A
- Discusses family, friends, lifestyle, and current living situation.*
  - Yes
  - No
  - N/A
- Explores any health, financial or employment concerns.*
  - Yes
  - No
  - N/A
- If conversation occurs in the customer's home, then includes information gathered from observation (e.g., home repair issues, assistance with household tasks, home safety, person's mobility and non-verbal communication).*
  - Yes
  - No
  - N/A

**Overall – Area of Consideration and Coaching:**
**Researches Options/Decision Support:** Options Counseling includes tailoring choices to meet the person's values and preferences. This phase in the Options Counseling process begins with researching options, and then moves to assisting the customer by providing decision support to narrow the choices based on the customer's evaluation of each option.

<table>
<thead>
<tr>
<th>Components – In-Person Feedback</th>
<th>Documented (*=required)</th>
<th>Feedback</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>•</strong> Presents detailed information related to each option (e.g., costs, frequency, use of informal supports).*</td>
<td>☐ Yes ☐ No ☐ N/A</td>
<td></td>
</tr>
<tr>
<td><strong>•</strong> Learns the customer's views (benefits and drawbacks on each option).*</td>
<td>☐ Yes ☐ No ☐ N/A</td>
<td></td>
</tr>
<tr>
<td><strong>•</strong> Assists customer to narrow and prioritize options.*</td>
<td>☐ Yes ☐ No ☐ N/A</td>
<td></td>
</tr>
</tbody>
</table>

**Overall – Area of Consideration and Coaching:**
## Components – In-Person Feedback

<table>
<thead>
<tr>
<th>Feedback</th>
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</table>

### Next Steps/Action Plan:
Options Counseling concludes with assisting the customer to outline the next steps including who, what and when.

- Summarizes information discussed.
- Assists customer to outline a list of tasks that would meet each identified need.*
  - Yes
  - No
  - N/A
- Offers to write down next steps listing what tasks are going to occur, who is responsible for the task and the customer's timeline.*
  - Yes
  - No
  - N/A
- Learns if there is anything that the customer envisions would get in the way of the next steps occurring.
  - Yes
  - No
  - N/A
- Offers to assist customer with tasks (e.g., careful not to overwhelm customer).
- Offers follow-up call.
  - Yes
  - No
  - N/A
- Thanks the customer.

### Overall – Area of Consideration and Coaching:

### Additional Information – Please select (X) if occurred

<table>
<thead>
<tr>
<th>Home/Office visit offered</th>
<th>Enrollment Counseling scheduled</th>
<th>Functional Screen scheduled</th>
</tr>
</thead>
<tbody>
<tr>
<td>Follow-up scheduled</td>
<td>Checked for understanding throughout the process</td>
<td>Smooth transition to home visit</td>
</tr>
<tr>
<td>ADRC Activities Recorded</td>
<td>Provided Information and Assistance</td>
<td>Referred for Private Pay Options</td>
</tr>
<tr>
<td></td>
<td>Provided Options Counseling</td>
<td>Provided Youth Transition Support</td>
</tr>
<tr>
<td></td>
<td>Administered Long-Term Care Functional Screen</td>
<td>Provided Enrollment Consultation</td>
</tr>
<tr>
<td></td>
<td>Referred to Economic Support</td>
<td>Provided Disenrollment Consultation</td>
</tr>
<tr>
<td></td>
<td>Provided assistance with Medicaid Application process</td>
<td>Provided Assistance / Referral for Health Promotion or Information</td>
</tr>
<tr>
<td></td>
<td>Referred for Financial Related Services other than Economic Support</td>
<td>Referred for Mental Health Services</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Referred for Substance Abuse Services</td>
</tr>
</tbody>
</table>