



Information and Assistance / Options Counseling

In-Person Feedback and Documentation Review Tool

Office Visit Home Visit Other Date Started

Date Completed	
ADRC Staff	
ADRC Customer	
Supervisor Notes	

Components – In-Person Feedback	Documented (* = required)	Feedback
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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.	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A	
• Informs the customer that information shared is confidential.	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A	

Overall – Area of Consideration and Coaching:



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Components – In-Person Feedback	Documented (*= required)	Feedback
<p>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.</p>		
<ul style="list-style-type: none"> Continues to develop rapport. 		
<ul style="list-style-type: none"> Learns the reason for the contact and whether the concern is urgent (e.g., customer's timeline for making a decision).* 	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A	
<ul style="list-style-type: none"> Uses open-ended questions to learn the customer's values, preferences, strengths/challenges (uses Motivational Interviewing skills).* 	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A	
<ul style="list-style-type: none"> Discusses family, friends, lifestyle, and current living situation.* 	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A	
<ul style="list-style-type: none"> Explores any health, financial or employment concerns.* 	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A	
<ul style="list-style-type: none"> 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).* 	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A	
<p>Overall – Area of Consideration and Coaching:</p>		

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<p>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.</p>		
<ul style="list-style-type: none"> • Presents detailed information related to each option (e.g., costs, frequency, use of informal supports).* 	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A	
<ul style="list-style-type: none"> • Learns the customer's views (benefits and drawbacks on each option).* 	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A	
<ul style="list-style-type: none"> • Assists customer to narrow and prioritize options.* 	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A	
<p>Overall – Area of Consideration and Coaching:</p>		

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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.*	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> 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.*	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A	
• Learns if there is anything that the customer envisions would get in the way of the next steps occurring.	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A	
• Offers to assist customer with tasks (e.g., careful not to overwhelm customer).		
• Offers follow-up call.	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A	
• Thanks the customer.		
Overall – Area of Consideration and Coaching:		

Additional Information – Please select (X) if occurred

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