Enrollment 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**
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.		
• Reviews role with the customer at this point in the process.		
• Discusses timeline for the enrollment process.		
• Summarizes and updates customer on information from previous visit and purpose for the current visit.		
• Confirms that information shared is confidential.		
• Checks for understanding.		
Overall – Area of Consideration and Coaching: **Common handout: Enrollment Counseling video.**		

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Components – In-Person Feedback	Documented (*=required)	Feedback
Discovery: During this phase in the Enrollment Counseling process, key information is shared with and elicited from the person regarding long-term care programs available in the ADRC service area.		
• Continues to develop rapport.		
• Provides information print and/or video formats regarding publicly funded long-term care programs (Family Care and Include, Respect, I-Self Direct [IRIS], Partnership and Program of All-Inclusive Care for the Elderly [PACE]) where available.*	■ Yes ■ No ■ N/A	
• Uses open-ended questions to learn the customer's thoughts and perspectives on options presented.*	■ Yes ■ No ■ N/A	
• Learns the customer's knowledge of long-term care programs and clarifies any misunderstandings.*	■ Yes ■ No ■ N/A	
• Provides information on cost share if applicable.*	■ Yes ■ No ■ N/A	
• Checks for understanding.		
Overall – Area of Consideration and Coaching: **Common handouts: Which program is best for me?, Tell Me More About and Covered Services chart.**		

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Components – In-Person Feedback	Documented (*=required)	Feedback
Decision Support: Enrollment Counseling includes tailoring choices to meet the person's values and preferences.		
• Checks in with the person to confirm their understanding of the program.		
• Presents additional detailed information related to each option, if customer desires (e.g., provider network, IRIS budget).*	■ Yes ■ No ■ N/A	
• If the person selects a program with more than one managed care organization (MCO), reviews MCO options sheet.*	■ Yes ■ No ■ N/A	
• If person is interested in learning more about IRIS, shares information on IRIS consultant agencies and completes the referral.*	■ Yes ■ No ■ N/A	
• Checks for understanding.		
Overall – Area of Consideration and Coaching:		
Common handouts: Key Differences between Managed Care and IRIS, Self-Direction in Managed Care and MCO Options Chart.		

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Components – In-Person Feedback	Documented (*=required)	Feedback
Next Steps/Action Plan: Options Counseling concludes with assisting the customer to outline next steps including who, what and when.		
• Summarizes information discussed.		
• Checks for understanding.		
• Completes necessary paperwork (e.g., enrollment or referral form).*	■ Yes ■ No ■ N/A	
• Completes next steps sheet.		
• Thanks the customer. Reaffirms timeframe and contact information for questions.		
Overall – Area of Consideration and Coaching: **Common Handouts: Next Steps.**		

Additional Information – Please select (X) if occurred
■ Checked for understanding throughout the process.

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