



Disenrollment 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.			
• Confirms that information shared is confidential.			
• Checks for understanding.			
Overall – Area of Consideration and Coaching:			



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Discovery: During this phase in the Disenrollment Counseling process, key information is discussed with the person. This includes their reasons for considering disenrollment.		
<ul style="list-style-type: none"> Continues to develop rapport. 		
<ul style="list-style-type: none"> Learns person's reason for possible disenrollment (financial – failure to pay cost share; non-financial program related or other).* 	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A	
<ul style="list-style-type: none"> Clarifies if the person needs information about or has started a complaint and grievance process or procedure.* 	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A	
<ul style="list-style-type: none"> Provides problem-solving if appropriate {e.g., connection with Managed Care Organization (MCO) member liaison, IRIS (Include, Respect, I Self-Direct) Agency, etc.}.* 	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A	
<ul style="list-style-type: none"> Checks for understanding. 		
Overall – Area of Consideration and Coaching:		

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Decision Support: Disenrollment Counseling includes tailoring choices to meet the person's values and preferences.		
<ul style="list-style-type: none"> Helps person to understand the implications of disenrollment if appropriate (e.g., potential loss of Medicaid coverage or other negative impact to the customer).* 	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A	
<ul style="list-style-type: none"> If customer is interested in or wishes to enroll in a different program, discusses and provides information in print and/or video formats regarding publicly funded long-term care programs (Family Care and IRIS, Partnership and Program of All-Inclusive Care for the Elderly [PACE]) where available.* 	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A	
<ul style="list-style-type: none"> Provides detailed information related to each option if customer desires.* 	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A	
<ul style="list-style-type: none"> If the person selects a managed care program with more than one MCO, reviews MCO options sheet and completes enrollment form. If person is interested in learning more about IRIS, shares information on IRIS consultant agencies and completes the referral.* 	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A	
<ul style="list-style-type: none"> If the person is not enrolling in another long-term care program, provides information and assistance/options counseling regarding Medicaid benefits (if appropriate) or private pay and other low cost options.* 	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A	
<ul style="list-style-type: none"> Checks for understanding. 		
Overall – Area of Consideration and Coaching:		

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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 and/or disenrollment form).*	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A	
• Assists person in next steps if appropriate.		
• Thanks the customer.		
Overall – Area of Consideration and Coaching:		