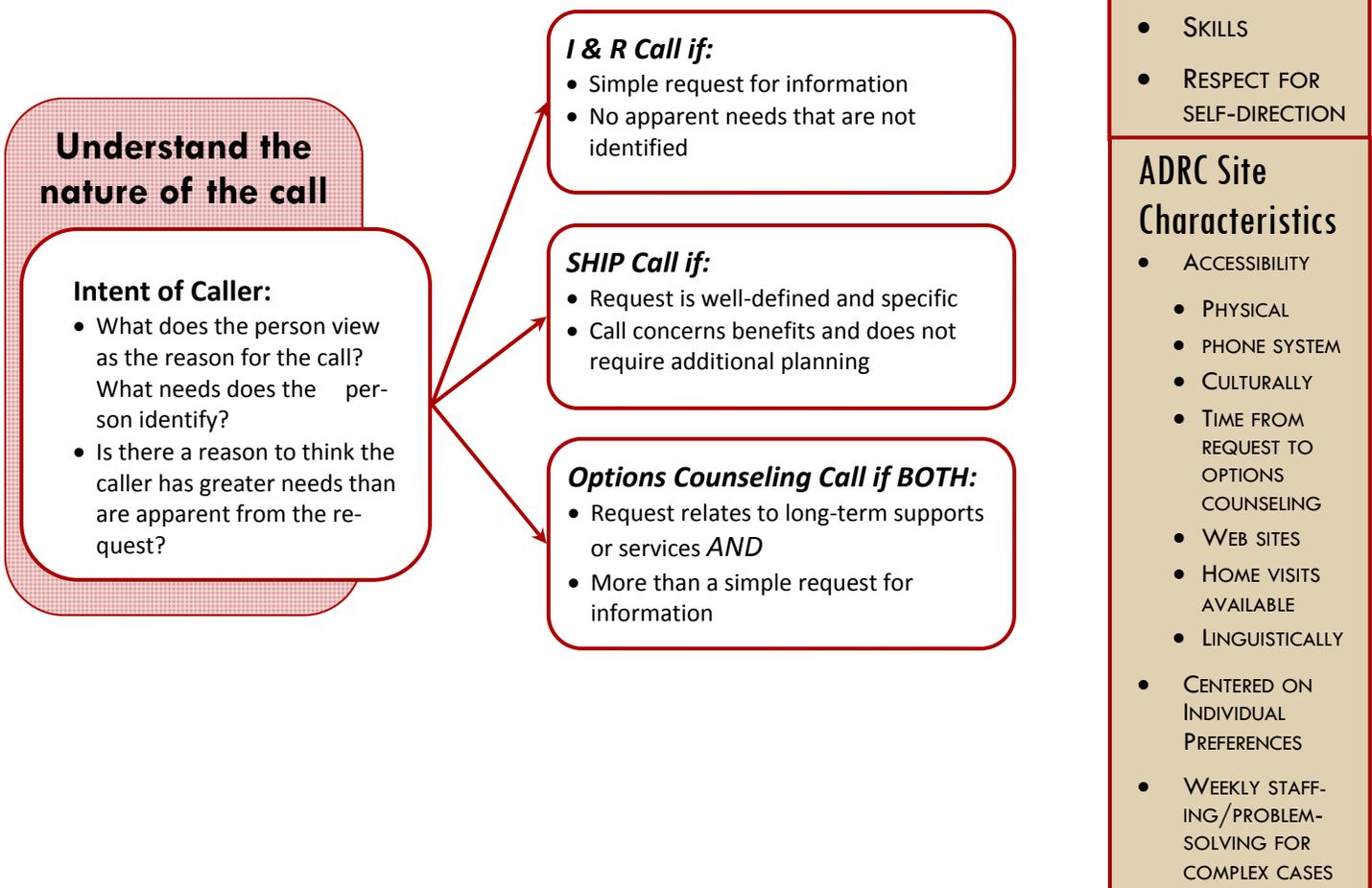


Options Counseling:

A call comes in...

Everyone in the aging and disability networks should be able to identify the need for options counseling. Because an I&R call is often the first interaction an agency will have with a consumer, I&R specialists, SHIP counselors, volunteers, and other front-line staff should know options counseling when they see it.

- Set a welcoming tone and convey openness; establish rapport,
- Allow the caller to tell their personal story,
- Ask open-ended questions such as “what type of assistance are you looking for” or asking them to describe a typical day,
- Listen for underlying problems,
- Listen for cues that signal the person is at the point of decision-making, such as *maybe I... I don't know... Someone told me I need... or I can't...*; and
- Ask directly if the consumer would like additional support thinking through options and making choices.



Options Counseling:

Options Counseling

An interactive decision support process whereby consumers, family members and/or significant others are supported in their deliberations to determine appropriate long-term support choices in the context of the consumer's needs, preferences, values, and individual circumstances.

Assess the call

Intent of the Individual, *as distinct from the caller/ caregiver:*

- Does the individual know about this inquiry? Why is the individual not on the call?
- Does the individual want assistance?
- Is there a legal guardianship, **not power of attorney** (if unclear, has the caller gone to court to get this power?)
- Can the options counselor contact the individual directly?
- **What are the individual's preferences? (30,000 foot view...)**

Can the individual participate?

- Assess individual's level of involvement and ability to participate
- Inform caller that individual needs to be involved unless the individual defers or there is a very good reason to exclude (e.g. inability to participate, harm)
- Can provide basic information to caregiver, but cannot proceed to a deeper level without the individual
- Other?

Options Counseling:

Offer (Made by I & R or Intake Staff)

- Does the individual/caregiver want support thinking through options and making choices about long-term care?
- Who will provide?
- When?
- Where?
- Schedule an appointment.

Match complexity of call with offer:

- Does the individual have an impairment that will make counseling difficult?
- Does the individual have a suitable caregiver?
- Are there complex or challenging interpersonal issues?
- Are goals/needs substantial and/or complex?
- Does the individual need more time or information to work through the decision process?

If individual wants options counseling:

- Proceed to options counseling if OC is fielding the call
- Schedule an appointment with an OC

Where should options counseling take place?

Consider:

- Physical
- Mental
- Financial
- Emotional
- Existing formal and informal supports

Telephone appropriate when:

- Impairments will not interfere with telephone communication
- Telephone communication will not be cumbersome or awkward

In-office appropriate when

- Individual requests or would benefit from face-to-face contact
- Transportation is available to office
- No evident need for a home visit

In-home appropriate when

- Individual requests a home visit
- Complicated needs or dynamics
- Individual lacks transportation
- Need to assess the person in the home
- Need for a family meeting

Options Counseling:

Explain the nature of options counseling

- Options counselor will listen to what has been going on and offer potential options that might help
- The goal is for the individual and caregivers (if the individual agrees to include caregivers) to decide what may be available and how to achieve goals.
- Options counselor will listen to all parties concerned in a respectful manner
- Individual makes the decision; options counselor serves as a facilitator providing decision-making support, information, and/or resources that might help

Assess goals and motivation

- Check the perceptions of what is going on, why there's a need for assistance, and what the individual wants to accomplish
- Summarize and prioritize goals
- Gain insight about the individual's and caregiver's feelings about why they are seeking elicitation to resolve issues.
- Ask individual whether to break/schedule next session

Collect information needed to understand options

- Level of care
- Financial resources
- Informal support structure
- Formal support structure
- Current assistance from public benefit programs
- Other

Summarize

- Reflect on discussion
- Explore the whole picture
- Address other needs that the individual/caregivers have not raised.
- Ask individual whether to break/schedule next session

Options Counseling

Consider discrepancies

- Identify and discuss discrepancies between individual and caregivers
- Ask individual whether to break/schedule follow-up appointment

Educate and discuss pros and cons of options

- Educate about options
- Private benefits
- Public benefits
- Private providers
- Informal providers
- Other

Weigh and summarize the options

- Discuss benefits/burdens of choices
- Summarize the options, preferably in writing
- Ask individual whether to break/schedule follow-up appointment

Assess need for public benefit application

- Does the plan include application for public benefits?
- Does the individual or caregiver have the ability to navigate the application process without assistance?

Assess need for short-term case management

- Does the individual lack ability to carry out a plan?
- Is there a formal or informal caregiver who can assist?
- Does the ADRC have resources to provide case management?
- Refer

Document the plan

- Document the plan, preferably in writing
- Document who will do what
- Identify any unsettled decision points

Determine level of follow-up

- Consider how likely it is that the plan can be implemented
- Document and calendar level of follow-up
- Carry out follow-up