

Aging & Disability Resource Network Training

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“Day in the Life” of an Options Counselor

Options Counseling

- Assists individuals in need of long term care supports to make an informed choice about the services that best meet their long term support needs
- Encourage the widest possible use of community-based options to allow people to live as independently as possible in the setting of their choice
- Individuals and caregivers receive unbiased information about a range of long term care support options, such as case management, personal care services, home delivered meals, transportation, etc. informed of the resources to help pay for services.
- Provides decision-support to identify next steps in the process and help in connecting with services if needed

Core Components of Options Counseling

- Information Referral & Awareness
- Options Counseling & Assistance and Planning
 - Assessing Needs, Values & Preferences
- Streamlined Eligibility for Public Assistance Programs
- Benefits Counseling
- Person Centered Care Transitions
 - Goals, Values, & Needs



Evaluation of Needs and Services

- Consumer has complex or multiple needs or overwhelming barriers that keep them from accessing supports or services, or seeks planning for future needs
- Options Counselors will assist consumers with intermittent and short term services and support needs and provide education and outreach to help consumers understand their options
- Options Counselor will evaluate needs from the ADRC Rapid Screen completed by the Information, Assistance, & Referral

Assessment by Options Counselor

- Options Counselor will make initial contact with consumer via phone, face to face interview (ADRC) or will schedule a home visit for a comprehensive assessment of their needs. Exploring options, choices, pros and con's, and cost for needed services and supports (Options Counseling consumer toolkit)
- Intent of the Caller/Consumer: Why are they calling today? What do they see the problem to be? What needs do they identify as primary?
- What would the caller like to see happen as a result of their contact?

Needs/Preferences of Consumer

- Options Counselor will review level of support needed from information gathered from the ADRC Rapid Screen - i.e. physical problems and strengths, medications, activities of daily living (ADL's) bathing, dressing, toileting, housekeeping, meal preparations, transportation
 - Cognitive status
 - Emotional status - history of depression or mental health concerns
 - Home environment – stairs, home conditions, adaptive aides in place or needs

Needs/Preferences of Consumer

- Support network – family, friends, neighbors, church, existing agencies
 - Financial status – Benefit programs i.e. Medical assistance, SSI, SSDI, etc. Do they have the ability to meet basic needs with financial situation?
 - Options Counselor will complete the ADRC Options Counseling Interview Tool

Identification of Services

- Options Counselor will describe services in the form of an action plan
- Options Counselor will explain what they might expect as they contact agencies or apply for benefits
- Options Counselor will group services by options along the continuum of care.
 - i.e. Services that come into the home, intermediate level of care in assisted living or apartment living, skilled level of care services, nursing homes

Identification of Services

- Options Counselor will assist consumer with decision support by helping them weigh the pros and cons of choosing for instance, assisted living at a certain cost and how that might affect their short and long term goals i.e. Choosing assisted living at a certain cost is much more expensive than bringing in meals and a housekeeper.
- Options Counselor will develop an **ACTION PLAN**:
 - Describe the plan for the next steps
 - Who is going to do what and when
 - Communicate clearly with consumer and/or their family or caregiver
 - Document clearly the discussion in case notes of what was identified as the action plan
 - Follow up as needed

Section Q

- Under Minimum Data Set (MDS) program, nursing facility residents are asked whether they want to remain in the nursing facility or to seek a less restrictive environment
- HVAAA & Heritage AAA are Local Contact Agencies (LCA) for Section Q as well as the Office of the State Long Term Care Ombudsman
- LCA's assist the nursing facility resident with transition planning to address barriers to successfully discharging from the nursing facility

Section Q

- ADRC staff will access the referral from IDHS ISIS system and will make phone contact with consumer to complete an initial intake using the ADRC Section Q Interview form
- Does the resident have the skills and support to be reintegrated into the community?
- Is resident Medicaid Eligible?

Barriers to Nursing Facility Residents Transitioning

- Waiting lists for waivers or rehabilitation services, housing, lack of income and resources, or funding not available
- Services & supports necessary to the health, safety and welfare of the consumer are unavailable to the resident at their choice of residence
- Harmful to consumer to move from the facility due to known medical needs and/or legal status requirements

Section Q

Transition Planning Service Plan Development:

- Review transition plan with consumer
- Confirm services are in place and they can obtain provider support: medical, social, housing, transportation, vocational assistance
- Follow up

*Our goal is to
give people the
tools they need
to choose the
right path for
themselves...*

