



FAQs

Options Counseling and Case Management

What activities occur during Options Counseling?

A person centered, face-to-face interview; assessment; screening national/state/local entitlement programs; facilitated decision making to identify goal[s]; developing action steps; follow-along for up to 90 days.

Can Options Counseling be done on the telephone?

No, a face to face interview *and* assessment is required for Options Counseling. If no face-to-face visit is conducted, it should be counted as I&A. If the consumer does not want AAA staff in their home, meeting at a different location such as AAA office, public library, or a mutually agreed upon spot is an alternative.

Do staff need to be AIRS certified in order to enter I&A units prior to an OC visit?

No, currently the only requirement for AIRS certification is for Family Caregiver Specialists.

Please clarify how to accurately document an Options Counseling.

The service of Options Counseling requires both a face-to-face visit and completing an assessment. If both these do not occur, it is not Options Counseling and should not be recorded as such. Failed Options Counseling visits should be the exception, rather than the norm. A best practice would be to call the consumer ahead of time in an attempt to ensure a face-to-face meeting.

Scenario: The Options Counselor confirms the appointment and travels to client's home. The client refuses the home visit or after some discussion does not want Options Counseling. The Options Counselor should record the prep/planning and travel activities as a unit of I&A.

Scenario: The Options Counselor confirms the appointment and travels to client's home. However, the individual was not home at the time of scheduled visit. The client calls the Options Counselor and reschedules the appointment for two days later. The face-to-face visit occurs and assessment is completed. Record all the time for the activities (prep/planning, travel, visit, documentation) as Options Counseling service delivery.

At what point does an Information & Assistance become Options Counseling or EAPA Consultation become EAPA Assessment & Intervention?

Both Options Counseling and EAPA Assessment & Intervention begin when a face-to-face visit occurs *and* the appropriate assessment is conducted. EAPA consultation is a subcategory of I&A. Likewise, EAPA Assessment & Intervention is a sub-category of case management. If a visit does not result in a

face-to-face assessment, the activity is EAPA Consultation. Likewise, if the visit does result in a face-to-face assessment and intervention plan, the activity is EAPA Assessment & Intervention.

At what point does Options Counseling become Case Management?

Options Counseling is a short-term (90 days or less) transitional service to assist consumers in setting up a support plan. Case Management is a long-term (90 days or more) coordination and monitoring of support services. If a situation appears to be complex and support will be needed for more than 90 days, the service of Case Management is to be used.

Do Performance Measures for Options Counseling also apply to Family Caregiver Options Counseling?

Yes. It is the responsibility of the OC/Family Caregiver Specialist to complete the necessary fields in WellSky.

Will there be a more applicable assessment for Caregivers?

Yes. The Family Caregiver Program will see multiple enhancements during this calendar year.

Do all OC consumers receive an action plan?

Yes.

Will FCG Case Management follow the same rules as Chapter 21, Case Management? And Performance Measures.

Yes. Administrative Rules will be updated later in 2019 and at the conclusion of the FCG Project.

Is there a requirement for how many ADLs a Consumer must have before receiving the service of Case Management?

The definition for case management does not require 2+ ADLs for the service to be provided. The requirement for 2+ ADLs was used when determining level of care for the Elderly Waiver. IDA purposely broadened the definition to better meet the needs of our population. Also, there is no requirement in Chapter 21: *The Service of Case Management*, that requires an individual receive two or more HCBS services. Services provided should match client needs based on the assessment.

How do we document service delivery time?

The services of Options Counseling, Case Management and EAPA Assessment & Intervention have an hour unit measure. Staff may record time as a partial hour to two decimal places in 15 minute increments (e.g. 0.25 = 15 min; 0.5 = 30 mins; 0.75 = 45 mins; 1.00 = 60 mins). Unit measure details are outlined in the Services, Definitions and Unit Measures section of the Reporting Manual.

How do we document staff time in Wellsky?

This training is designed to provide information on Services, Definitions, and Unit Measure and the tracking and recording units for service delivery. IDA does not have a policy regarding the tracking and recording of activities and time not associated with units of service delivery. For issues related to WellSky, please continue to work with the AAA System Administrator.



Where can we find this presentation?

This and all service definition trainings will be placed on the IDA Website, under the Area Agencies on Aging tab for future reference and training purposes. See our Area Agency on Aging Professionals web page at <https://www.iowaaging.gov/area-agencies-aging/area-agency-aging-professionals>. Or contact julie.bergeson@iowa.gov for more information.