

Options Counseling Service Standard Operating Procedures

The service of Options Counseling (OC) falls under the Information & Service Assistance category, is a mandatory service and is highlighted below. The subcategories of Family Caregiver Options Counseling follow the general category of OC.

Information & Service Assistance (Mandatory)
<ul style="list-style-type: none"> • Case Management <ul style="list-style-type: none"> FC Case Management ORC Case Management – Optional EAPA Assessment & Intervention • FC Counseling <ul style="list-style-type: none"> ORC Counseling – Optional • Information & Assistance <ul style="list-style-type: none"> FC Information & Assistance ORC Information & Assistance – Optional EAPA Consultation • Legal Assistance • Options Counseling <ul style="list-style-type: none"> FC Options Counseling ORC Options Counseling – Optional

OAA Options Counseling Service

Purpose

To provide an interactive process whereby individuals receive guidance in their deliberations to make informed choices about long-term supports. The process is directed by the individual and may include others whom the individual chooses or those who are legally authorized to represent the individual.

Functions

- Person Centered
- Facilitated decision making exploring resources and service options
- Interactive, personal interview and assessment of needs
- Allows consumer to make informed choices based on their preferences, strengths and values
- Goals and action steps developed with consumer based on their wants/needs

- Consumer coordinates services and supports
- Progressive Plan (just in time/ what is needed right now/near future)

Staffing

- Bachelor's degree in a human services field; or
- License to practice as a registered nurse; or
- Bachelor's degree and two years of experience working in the areas of aging, disabilities, community health, or hospital discharge planning; or
- Associate's degree and four years of experience working in the areas of aging, disabilities, community health, or hospital discharge planning; or
- License to practice as a licensed practical nurse and four years of experience working in the areas of aging, disabilities, community health, or hospital discharge planning

Consumer Eligibility

- Older individuals
- Individuals with disabilities who are aged 18 or older

Definition

Service of providing an interactive process whereby individuals receive guidance in their deliberations to make informed choices about long-term supports. The process is directed by the individual and may include others whom the individual chooses or those who are legally authorized to represent the individual. Options counseling includes the following:

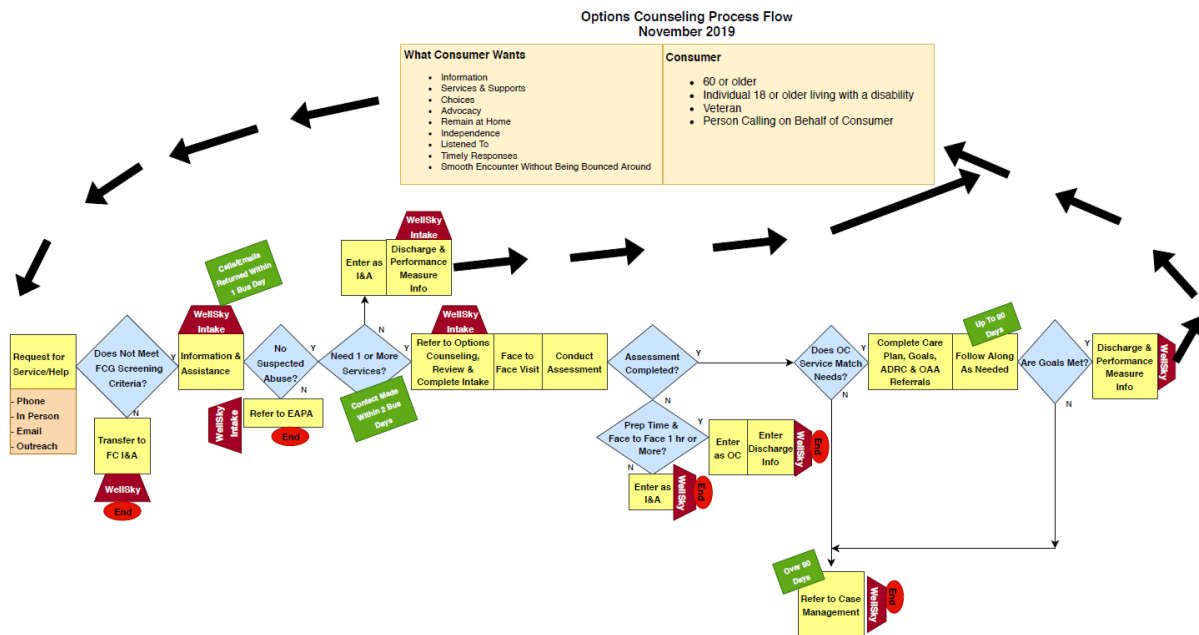
- (1) A personal, face-to-face interview and assessment to discover strengths, values, and preference of the individual and screenings for entitlement program eligibility,
- (2) A facilitated decision-making process which explores resources and service options and supports the individual in weighing pros and cons,
- (3) Developing action steps toward a goal or a long-term support plan and assistance in applying for and accessing support options, and
- (4) Follow-up to ensure supports and decisions are assisting the individual.

Length of Time

- Up to 90 days then transition to OAA Case Management Service.
- Follow up to ensure supports and decisions are assisting the individual.

Process Flow

Appendix G



Follow Up Requirements

- Follow up to ensure supports and decisions are assisting the individual.

Performance Measure

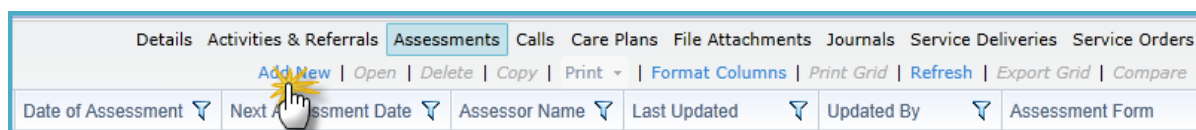
- Percentage of Options Counseling and FC/ORC Options Counseling consumers who indicate they were provided information to make an informed decision on goal and service need.

WellSky Instructions

Complete the OC Performance assessment in WellSky when discharged from the OC Program.

OC Performance Assessment Form

1. Click the **Assessments** link found in the Consumer Record.
2. Click **Add New** on the assessment toolbar.

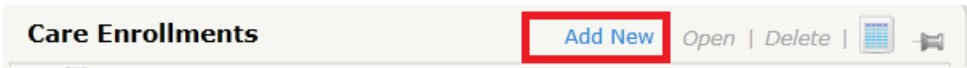


3. Select the **OC Performance Assessment Form**.
4. Select the appropriate **Care Program / Agency**, and/or **Provider** performing the assessment.
5. Enter the **Date of Assessment** to reflect when the assessment was performed (if it is different from today's date).
6. Click **OK**.

OC Care Enrollments

OC Referral

1. Click Add New in the Care Enrollments section of the consumer record.



2. Select LifeLong Links as Level of Care and OC Referred as the Service Program
3. Set Status as OC Referred
4. Set Start Date as the date of the OC Referral
5. Click OK to save and close the Care Enrollment
6. Remember to Save Client Record

Care Enrollment - OC Referred X

OK | Cancel | Add Next | Open Audits |

Level Of Care LifeLong Links

Service Program OC Referred

Care Program OC Referred

Application Date 4/28/2017

Received Date 4/28/2017

Termination Date Enter date

Status OC Referred

Reason

Status Date 4/28/2017

Start Date 4/28/2017

End Date Enter date

NOTE: For CG Options Counseling the Caregiver and Care Recipient should also be enrolled in FC Referred.

OC Admitted

1. Click Add New in the Care Enrollments section of the consumer record.

Care Enrollments **Add New** Open | Delete | [Grid Icon] [Print Icon]

2. Select LifeLong Links as Level of Care and OC Admitted as the Service Program
3. Set Status as OC Admitted
4. Set Start Date as the date of the OC Face to Face Visit
5. Click OK to save and close the Care Enrollment
6. Remember to Save Client Record

Care Enrollment - OC Admitted X

OK | Cancel | Add Next | Open Audits |

Level Of Care LifeLong Links

Service Program OC Admitted

Care Program OC Admitted

Application Date 12/10/2019

Received Date 12/10/2019

Termination Date Enter date

Status OC Admitted

Reason

Status Date 12/10/2019

Start Date 12/10/2019

End Date Enter date

NOTE: For CG Options Counseling the Caregiver and Care Recipient should also be enrolled in FC Admitted.

OC Discharged

1. Click Add New in the Care Enrollments section of the consumer record.

Care Enrollments **Add New** Open | Delete | [Grid Icon] [Print Icon]

2. Select LifeLong Links as Level of Care and OC Discharged as the Service Program
3. Set Status as OC Discharged
4. Select Reason for the OC Discharge
5. Set End Date of the OC Admitted care enrollment to OC Discharged date
6. Set Start Date of OC Discharged as the date of the OC Admitted
7. Set End Date of the OC Discharged care enrollment to OC Discharged date
8. Click OK to save and close the Care Enrollment
9. Remember to Save Client Record

OC Assessment Service Form

1. Click the **Assessments** link found in the Consumer Record.
2. Click **Add New** on the assessment toolbar.

3. Select the **Assessment Form**.
4. Select the appropriate **Care Program / Agency**, and/or **Provider** performing the assessment.
5. Enter the **Date of Assessment** to reflect when the assessment was performed (if it is different from today's date), and set the **Next Assessment Date** if a reassessment is due.
6. Click **OK**.

NOTE: For CG Options Counseling the Iowa_Caregiver_AssessmentSFY20 should be used

OC Care Plans

1. Select **Care Plans** then select **Add New**.

2. Enter the appropriate Care Plan information.

3. Select **Goals** then select **Add New** - **The only Area of the Care Plan OC uses is Goals**.

4. Enter the appropriate OC **Goal** area.

5. Enter the appropriate **Target Date**.

Care Plan - OC Admitted 12/10/2019 - 6/9/2020 x Goal - OC Financial Assistance x
OK | Cancel | Add Next | Print | Open Audits |

Goal OC Financial Assistance

Target Date 12/13/2019

Comments

6. Enter the Action Steps taken to meet the **Goal** in the **Comments**.

Comments

1. Will seek counseling by 8/1/2017
2. Will set up coursed for husband by 8/1/2017

7. Enter the appropriate **Achieved** Date.

Care Plan - OC Admitted 12/10/2019 - 6/9/2020 x Goal - OC Financial Assistance x
OK | Cancel | Add Next | Print | Open Audits |

Goal OC Financial Assistance

Target Date 12/13/2019

Achieved

Actual Date 12/12/2019

Comments

OC Case Notes

In Wellsky OC Case Notes are entered under Activities & Referrals. Journals can be used in addition to Activities & Referrals at the AAA discretion.

The Activities & Referrals is added through the consumer record.

1. In the Consumer Record toolbar, click Activities & Referrals then Add New.

Notes:

Details Activities & Referrals Assessments Billing Calls Care Plans Episodes File Attachments Journals Routes Service Delivery

Sorted By Care Program

Add New

2. Complete the areas in Red Box Below

Activity/Referral - Face to Face, Face to Face X

Activity/Referral - Face to Face, Face to Face

Save | Save and Close | Close | Add Next | Make a Copy | Print | Open Audits | Format Panels

Subject Face to Face

Action Face to Face

Agency Northeast Iowa Area Agency on Aging (NEI3A)

Provider Darlis Hawkins

Care Program OC Admitted

Status Completed

Reason

Status Date 12/13/2019

Due Date Enter date

Start Date 12/12/2019

Start Time 9:00 AM

Date Completed 12/12/2019

Time Completed 10:00 AM

Follow-Up Status Not Required

Follow-Up Date Enter date

Comments

Did a Face to Face

Services

File Attachments

Consumer - Client, Test (1356091174)

Details Activities & Referrals Assessments Billing Calls Care Plans **File Attachments** Journ

Sorted By Created Date

Add New | Open | View Attachment

File Attachment X

File Attachment

Save | Save and Close | Close | Add Next | Open Audits

Folder Options Counseling

Description

File Name (Browse for a file)

File Type

File Size 0

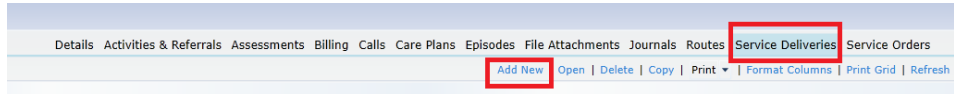
Examples of File Attachments

- Consumer Signature Page
- Release(s) of Information
- Legal Representative Documents

Service Deliveries

All OC Service deliveries prior to a Face to Face shall be entered as Information & Assistance under the OC Referred Care Enrollment.

1. Select **Service Deliveries** then select **Add New**.



2. The Service Delivery screen is displayed. Enter complete date in Red Boxes The Calender feature may be used at AAA discretion.

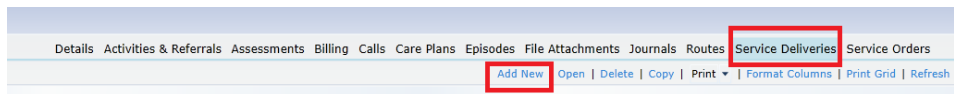
The screenshot shows the 'Service Delivery - Information & Assistance, 1 Units' form. The following fields are highlighted with red boxes: 'Care Program' (OC Referred - 04/28/2017 - (No End Date) [OC]), 'Agency' (Northeast Iowa Area Agency on Aging (NEI3A)), 'Provider' (Northeast Iowa Area Agency on Aging (NEI3A)), 'Service' (Information & Assistance), 'Service Month/Year' (12/2019), 'Units' (1.00), 'Unit Price' (\$0.00), and the 'Topics' table. The 'Topics' table has the following data:

Topic	Date	Comments
Yes I received information	12/18/2019	

A calendar for December 2019 is also visible, with the date 12/18/2019 highlighted in a red box.

All OC Service deliveries after during and after the Face to Face shall be entered as Options Counseling or CG Options Counseling if Caregiver Options Counseling is provided under the OC Admitted Care Enrollment.

1. Select **Service Deliveries** then select **Add New**.



2. The Service Delivery screen is displayed. Enter complete date in Red Boxes The Calender feature may be used at AAA discretion.

Service Delivery - Options Counseling, 5 Units X

Save | Save and Close | Close | Add Next | Make a Copy | Print | Open Audits | Add New

Care Program: OC Admitted - 12/10/2019 - (No End Date)...

Agency: Northeast Iowa Area Agency on Aging (NEI3A)

Provider: Northeast Iowa Area Agency on Aging (NEI3A)

Service: Options Counseling

Subprovider:

Subservice:

Site:

Service Month/Year: 12/2019

Units: 5.00

Unit Price: \$0.00

Type: 1 Hour

Total Cost: \$0.00

Diagnosis Code:

Specify units by day in the calendar below:

December, 2019

Sun	Mon	Tue	Wed	Thu	Fri	Sat
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18 5	19	20	21
22	23	24	25	26	27	28
29	30	31				

End of WellSky Instructions

Family Caregiver Options Counseling Service

Purpose

To provide an interactive process whereby caregivers receive guidance in their deliberations to make informed choices about long-term supports. The process is directed by the caregiver.

Functions

- Person Centered
- Facilitated decision making exploring resources and service options
- Interactive, personal interview and assessment of needs
- Allows caregivers to make informed choices based on their preferences, strengths and values
- Goals and action steps developed with caregiver based on their wants/needs
- Caregiver coordinates services and supports
- Progressive Plan (just in time/ what is needed right now/near future)

Staffing

- A bachelor's degree in the human services field or
- An associate's degree in the human services field and two years of employment in information and referral positions, which may be substituted for a bachelor's degree.
- Three years of prior employment in information and referral positions.

- A family caregiver specialist shall possess and maintain a current Certification for Information and Referral (I&R) Specialists in Aging (CIRS-A) from the Alliance of Information and Referral Systems at the time of employment or contract

Consumer Eligibility

- Family caregivers of older individuals
- Family caregivers of individuals with disabilities who are aged 18 or older (ORC)

Definition

Service of providing an interactive process whereby caregivers receive guidance in their deliberations to make informed choices about long-term supports. The process is directed by the caregiver and may include others whom the individual chooses or those who are legally authorized to represent the individual. Options counseling includes the following:

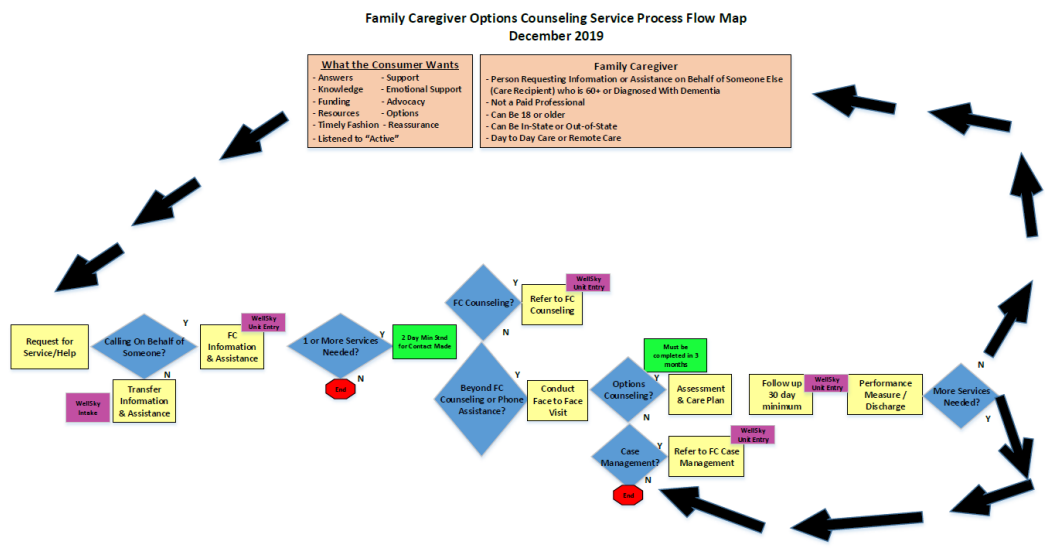
- (1) A personal, face-to-face interview and assessment to discover strengths, values, and preference of the caregiver and screenings for entitlement program eligibility,
- (2) A facilitated decision-making process which explores resources and service options and supports the caregiver in weighing pros and cons,
- (3) Developing action steps toward a goal or a long-term support plan and assistance in applying for and accessing support options, and
- (4) Follow-up to ensure supports and decisions are assisting the caregiver.

Length of Time

- Up to 90 days then transition to Family Caregiver Case Management Service.
- Follow up to ensure supports and decisions are assisting the caregiver.

Process Flow

Appendix H



Follow Up Requirements

- Follow up to ensure supports and decisions are assisting the individual.

Performance Measure

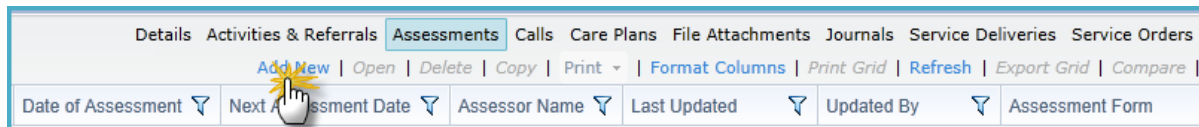
- Percentage of Options Counseling and FC/ORC Options Counseling consumers who indicate they were provided information to make an informed decision on goal

WellSky Instructions

Complete the OC Performance assessment in WellSky when discharged from the OC Program.

OC Performance Assessment Form

1. Click the **Assessments** link found in the Consumer Record.
2. Click **Add New** on the assessment toolbar.



3. Select the **OC Performance Assessment Form**.
4. Select the appropriate **Care Program / Agency**, and/or **Provider** performing the assessment.
5. Enter the **Date of Assessment** to reflect when the assessment was performed (if it is different from today's date).
6. Click **OK**.

New Assessment

Import from XML? No Yes

Form Filename: OC_Performance.afm

Show All Forms?

Author: Dick Harmon

Last Updated: 7/25/2017 8:52:53 AM

Version: 1.0.4

Care Program: OC Discharged

Agency: Northeast Iowa Area Agency on Aging (NEI3A)

Provider: Colleen Lawler

Subprovider:

Site:

Date of Assessment: 12/12/2019

Next Assessment Date: Enter date

Assessor Name:

Password:

Verify Password:

Comments

OK

Cancel

See the OC Options Counseling Section for OC Care Enrollments / Assessments / Care Plans / Case Notes and Service Deliveries.

Linking Family Caregiver / Care Recipients

When OC Options Counseling is provided, the Family Caregiver and Care Recipients should both have the required Family Caregiver enrollments and the Caregiver/Care Recipient linked.

Consumer - Abernathy, James (1382155894)

Details | Activities & Referrals | Assessments | Billing | Calls | Care Plans | File Attachments | Journals | Routes | Service Deliveries | Service Orders

Save | Save and Close | Close | Reject Changes | Print | Open Audits | Format Panels | Status Wizard | Merge | Copy Client ID

Open Basic Information

Name: James Abernathy

Date Registered: 04/26/2016

Consumer Details Last Reviewed: 04/26/2016

Marital Status: Single

DOB: 01/01/1966

Information Release Authorized: No

Default Agency: ncaapn

Care Enrollments

Add New | Open

Care Management 04/26/2016
Waiting
DSAAPD

Family Caregiver 04/26/2016
Active
DSAAPD

Add New

- Activity/Referral
- Assessment
- Call
- Care Enrollment
- Care Manager
- Care Plan
- Care Recipient
- Caregiver


Consumer - Abernathy, James (1382155894)

Details | Activities & Referrals | Assessments | Billing | Calls | Care Plans | File Attach

Caregiver - Abernathy, Mary X

OK | Cancel | Add Next | Open

Click here to search for caregiver

Caregiver: Abernathy, Mary  X


Caregiver Client ID: 1338734165

Caregiver Agency: DSAAPD

Caregiver Relationship to Care Recipient: Wife

Caregiver - Harmon Client, Dick Test d X

OK | Cancel | Add Next | Open Audits | Open Caregiver |

Caregiver: Harmon Client, Dick Test d  X

Caregiver Client ID: 1356091174

Caregiver Agency: Connections Area Agency on Aging

Caregiver Relationship to Care Recipient: Husband

Start Date: 4/28/2017

End Date: Enter date

Primary?

Family Caregiver Program Type: Federal

At Risk for Abuse or Neglect

No

Yes

Don't Know

Note: Make sure Federal is selected.

End of WellSky Instructions