



Components/Core Functions of Options Counseling

NC Options Counseling Standards	Federal Perspective
<p>Personal Interview</p> <ul style="list-style-type: none"> A person-centered conversation shall be the first step in the Options Counseling process. The purpose of this conversation is for the Options Counselor to learn about the person's values, strengths, preferences, concerns and available resources he/she may use for long-term services and supports. The interview shall occur as soon as possible with accommodation for language and disability needs. The Options Counselor shall determine the capacity of the individual to 1) understand the information and 2) self-advocate. <p>Guidance: Options Counseling is a person-centered planning process directed by the individual. This includes selection of goals, when and where meetings are held, who is a part of the planning meetings, topics to be/not to be discussed, and decisions about supports and services the individual selects. The personal interview may involve more than one conversation. At the end of each conversation, the Options Counselor should summarize the discussion with the individual</p>	<p>Conduct One-to-One Person-Centered Interview</p> <ul style="list-style-type: none"> Confirm the person needs LTSS and explain how Person-Centered Counseling can assist the person in getting his/her needs met. Conduct interview using person-centered approach, in person's preferred setting, and include family or representative as requested/needed while insuring that the person maintains control of the process. Work with the person to identify, prioritize and respond to any immediate needs. Work with the person to identify the ongoing/longer-term issue(s) that the person wants addressed. Work with the person to examine factors that will influence how his/her needs can best be met, including use of or interest in self-direction; private resources such as personal, family and community supports; special designations that may carry health/service benefits (e.g. Veteran); and any family support needs. Take appropriate action to ensure privacy and confidentiality of information shared by the person. Document encounter activity and information to use for ongoing work with the person and for completion of appropriate assessment instruments and eligibility forms as needed.

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<p>Decision Support</p> <ul style="list-style-type: none"> • The Options Counselor shall facilitate a decision-support process that assist the individual in evaluating various pathways, including the pros/cons of specific choices. • If the individual requires information and resources that exceed the Options Counselor’s knowledge, the Options Counselor shall research and seek assistance from subject matter experts. • Decision-support tools and techniques obtained through the required Options Counselor training shall be used in this process. This includes the use of person-centered thinking tools. <p>Guidance: Decision support is a key element that distinguished Options Counseling from Information and Assistance. The Options Counselor may utilize decision support tools such as Benefitscheckup.com that 1) supports the Options Counselor’s capacity to compete the personal interview and 2) generated a list of the individual’s needs for long-term services and supports and potential resources</p> <p>Action Plan</p> <ul style="list-style-type: none"> • The Options Counselor shall support the individual in developing a written person-centered Action Plan, unless the individual elects not to create the plan. Any decision not to develop a plan must be documented in the individual’s record. At a minimum, the Action Plan shall include the following components: <ul style="list-style-type: none"> ✓ the individual’s values, strengths, preferences and concerns ✓ potential resources 	<p>Develop Person-Centered Plan</p> <ul style="list-style-type: none"> • Based on the person’s goals, preferences, supports, needs and experience, work with the person to identify the full range of appropriate private and public resources that are potentially available to the person, including participant-directed options. Discuss details of specific options of interest to the person, including, costs, eligibility, who each may work with the person’s formal and informal supports and resources, and the pros and cons and benefits of each options based on what is important to and for the person. • Based on the person’s goals, desired outcomes and specific choices, work the person, and, as appropriate, other relevant individuals to develop a written person-centered plan. • Work with the person to share copies of the plan with other relevant people so all involved parties can review it, including the actions required for implementation. <p>Facilitate Streamlined Access to LTSS</p> <ul style="list-style-type: none"> • Work with the person to access services and supports identified in the person-centered plan that could be paid for from his or her own resources or that are available through unpaid family members or natural/informal supports. • Work with the person, and others as appropriate, to collect any additional information needed to complete applications for any public programs, services and supports, including but not limited to Medicaid, that are

<ul style="list-style-type: none"> ✓ action steps outlines and identification of responsible party for carrying out the action ✓ designation of an agreed upon date for follow-up for the Options Counselor ✓ identification of any unresolved issues • The creation of the Action Plan shall incorporate the use of person-centered thinking tools as needed. • As indicated by the Action Plan, the Options Counselor may need to facilitate the completion of applications or assessment for the utilization of private and public resources. • A completed, signed plan shall be in the individual's possession within 10 business days following the completion of the personal interview and decision-support process. 	<p>identified in the person's plan, including functional level of care and financial eligibility determinations.</p> <ul style="list-style-type: none"> • Work with the person to submit all relevant applications and to navigate the eligibility determination process(es) for the private and public programs identified in the person's plan. • Work with the person, and others as appropriate, to identify any barriers to quickly addressing the services and supports identified in the person's plan, and advocate with the person, and as appropriate, with others including relevant program officials, to develop and implement strategies to minimize or eliminate barriers to full implementation of the plan.
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<p>Follow-up Follow-up shall be provided to the individual and documented. As general practice, it should occur within one (1) month but no longer than three (3) months after completion of the Action Plan. Follow-up may be conducted in person, by phone, or electronically as resources allow and the individual prefers.</p> <p>Guidance: Follow-up allows:</p> <ul style="list-style-type: none"> • the individual to clarify questions he/she may have about activating his/her plan • the Options Counselor the opportunity to navigate the individual through the application process for benefits and services and/or check the status of that process • the Options Counselor to track the individual over time • the individual and the CRC to track the usefulness of the service 	<p>Ongoing Follow-Up and Documentation</p> <ul style="list-style-type: none"> • Maintain contact with the person and/or family to learn if services have started, benefits have been received, foals are being met, as well as for feedback on the NWD process or any issues that need to be addressed. • Work with the person, and others as appropriate, to assist with revisions(s) to the person-centered plan as the person's needs and circumstances change. • Document the process and information related to the plan's ongoing implementation, including services and supports provided, goals being met, outcomes achieved, and feedback from the person and others on the NWD process; report this information as appropriate to the person and other relevant individuals.