



Options Counselors Protocol

1. RECEIVE

- a. Check email frequently for referrals. Referrals will come from an automated email sent via Huddle.net. *Please check your spam folder to ensure delivery!* The email will contain:
 - i. Four-digit Participant ID number (ex: 1005) to be referred to in all correspondence regarding patient.
 - ii. A link to Huddle.net spreadsheet location. *(This is temporary system until Oct 2010. You will need to log-into your Huddle.net account.*
- b. To accept the assignment *(Note: See technical documentation for detailed steps.)*
 - i. Click the link in the email and log-into your account.
 - ii. Download and lock the Excel file (Options Counseling Participant Tracker).
 - iii. Fill in your name under “Primary counselor name” in the Excel document.
Fill in the version note field with the accepted participant ID number.
 - iv. Upload new version of the Excel file and include ADS Helpline and the CLP Coordinator in “Notify other of change” send list.
 - v. See Huddle instructions for more detail.

Note: Once assignment is accepted, scanned paperwork will be sent to you from ADS Helpline via Tumbleweed.

2. CONTACT

- a. Notify discharge planner with your contact information and the name of the participant that you will be assisting.
- b. Contact the patient/potential program participant within one (1) business day.
 - i. If participant is home, contact via telephone to arrange initial visit. Notify the referring discharge planner with your contact information. -OR-
 - ii. If participant is still in the hospital, contact occurs via the Discharge Planner to coordinate the best time to talk with the patient. Set-up an in-person visit if feasible, preferably with patient’s family present.
- c. For home contact: If three (3) (spaced) phone calls are made with no answer, call emergency contact number (located on the CLP Referral form).

3. MEET

- a. Our goal is that the Options Counselor will have first meeting with the participant and family within three (3) business days of accepting the referral, five (5) days maximum.
- b. The initial visit may occur while the participant is staying in temporary housing or a secondary care facility.

4. COMMUNICATE

- a. Continue communications with the participant and family during the 30 to 90 day period.
- b. Update the Options Counseling Participant Tracker with appointment information.
- c. ADS is anticipating two to three (2-3) in-home visits to participants.
- d. ADS is anticipating three (3) or more telephone contacts with participants and their families.
- e. Additional time for researching participant options is expected.
- f. Total average time spent on participants is expected to be 12 - 15 hours per participant.

- g. Hours over 15 per participant must be approved by the CLP Coordinator.
- h. Keep written contact information (“case”) notes on the CLP Options Counseling notes form.
- i. Turn in timesheets to your supervisor so they can provide that information when billing ADS.

IF's: The Options Counselor or Helpline staff notifies the CLP Coordinator if they are aware of a change in participant residential status – such as nursing home placement - while they are working with the participant.