Disenrollment Counseling

In-Person Feedback and Documentation Review Tool

______ Office Visit ______ Home Visit ______ Other   Date Started ________________

Date Completed	
ADRC Staff	
ADRC Customer	
Supervisor Notes	

Components – In-Person Feedback	Documented (*=required)	Feedback
Welcome: The greeting and initial minutes of the customer interview set the tone for the conversation and the foundation for building rapport.		
• Professional greeting, warm tone of voice, kind, courteous.		
• Reviews role with the customer.		
• Confirms that information shared is confidential.		
• Checks for understanding.		
Overall – Area of Consideration and Coaching:		

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Components – In-Person Feedback	Documented (*=required)	Feedback
Discovery: During this phase in the Disenrollment Counseling process, key information is discussed with the person. This includes their reasons for considering disenrollment.		
• Continues to develop rapport.		
• Learns person's reason for possible disenrollment (financial – failure to pay cost share; non-financial program related or other).*	☐ Yes ☐ No ☐ N/A	
• Clarifies if the person needs information about or has started a complaint and grievance process or procedure.*	☐ Yes ☐ No ☐ N/A	
• Provides problem-solving if appropriate {e.g., connection with Managed Care Organization (MCO) member liaison, IRIS (Include, Respect, I Self-Direct) Agency, etc.}.*	☐ Yes ☐ No ☐ N/A	
• Checks for understanding.		
Overall – Area of Consideration and Coaching:		

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Decision Support: Disenrollment Counseling includes tailoring choices to meet the person's values and preferences.		
• Helps person to understand the implications of disenrollment if appropriate (e.g., potential loss of Medicaid coverage or other negative impact to the customer).*	☐ Yes ☐ No ☐ N/A	
• If customer is interested in or wishes to enroll in a different program, discusses and provides information in print and/or video formats regarding publicly funded long-term care programs (Family Care and IRIS, Partnership and Program of All-Inclusive Care for the Elderly [PACE]) where available.*	☐ Yes ☐ No ☐ N/A	
• Provides detailed information related to each option if customer desires.*	☐ Yes ☐ No ☐ N/A	
• If the person selects a managed care program with more than one MCO, reviews MCO options sheet and completes enrollment form. If person is interested in learning more about IRIS, shares information on IRIS consultant agencies and completes the referral.*	☐ Yes ☐ No ☐ N/A	
• If the person is not enrolling in another long-term care program, provides information and assistance/options counseling regarding Medicaid benefits (if appropriate) or private pay and other low cost options.*	☐ Yes ☐ No ☐ N/A	
• Checks for understanding.		
Overall – Area of Consideration and Coaching:		

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Components – In-Person Feedback	Documented (*=required)	Feedback
Next Steps/Action Plan: Options Counseling concludes with assisting the customer to outline next steps including who, what and when.		
• Summarizes information discussed.		
• Checks for understanding.		
• Completes necessary paperwork (e.g., enrollment and/or disenrollment form).*	☐ Yes ☐ No ☐ N/A	
• Assists person in next steps if appropriate.		
• Thanks the customer.		
Overall – Area of Consideration and Coaching:		