



NC DEPARTMENT OF
**HEALTH AND
HUMAN SERVICES**

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Division of Aging and Adult Services

ADMINISTRATIVE LETTER: No. 22-03

TO: Area Agency on Aging Directors

FROM: Joyce Massey-Smith, Director

DATE: June 23, 2022

SUBJECT: Revisions to the Options Counseling Component of the Information and Options Counseling Standards

Background

In July 2014, Options Counseling was added to the Information and Assistance standards under Section C- Division of Aging and Adult Services Administrative Requirements and the service was renamed "Information and Options Counseling." The Options Counseling requirements are comparatively new to the long-established Information and Assistance portions of the standards and are reviewed periodically to make adjustments based on increasing experience with the service.

In February 2022, a review of the Options Counseling portion of the Information and Options Counseling Standards was conducted by a committee comprised of experienced Options Counselors, Options Counseling supervisors, AAA staff, and state staff. Revisions were made that streamline some processes, particularly for Options Counseling supervisors, and will become effective July 1, 2022.

Options Counseling Requirement Revisions

The following significant revisions were made related to Options Counseling:

Page 20: Deleted XI.C.b. that required a letter from the supervisor of an Options Counseling applicant and outlined the letter's content. A supervisor's letter is no longer required as part of the application packet for Options Counseling Initial Certification training.

Appendix 8: Revised the Initial Options Counseling Certification Training application. In lieu of a letter, the supervisor's section of the application that acknowledges reading of

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the standards and recommending the applicant for Options Counseling certification training has been revised to include the agency's commitment to provide Options Counseling per the Information and Options Counseling standards.

Page 23: Revised XII.C.2.a. to reduce the number of years' experience in providing support to individuals needing LTSS from five to four years for an individual with a bachelor's or master's degree in a non-Human Services field.

Page 24: Revised XII.C.2.a. to delete reference to XI.C.b. A letter from the supervisor is still required when there is a waiver request to the applicant's educational qualification, work experience, or both. The reference was replaced with text and now reads, "A letter of recommendation from the applicant's supervisor that addresses the individual's suitability for Options Counseling certification."

Page 25: Revised XII.C.2.c. to change the number of Options Counseling client records annually reviewed by a supervisor. Previously supervisors reviewed 1/10 of the counselor's Options Counseling records or a minimum of 10 client records. If there were fewer than 10 records, the supervisor reviewed all. Supervisors will now annually review five Options Counseling client records. If there are fewer than five, the supervisor shall review all.

Minor revisions and formatting changes made due to the deletion of XI.C.b (supervisor letter) include the following:

Page 20: XI.C.c becomes XI.C.b. A letter from a board member is still required if an Executive Director is making application for Options Counseling certification. The contents of the letter are now listed and replace the reference to XI.C.b.

Page 20: XI.C.d. becomes XI.C.c. and reference to a supervisor's letter is deleted.

Page 20: XI.C.e. becomes XI.C.d and reference to a supervisor's letter is deleted.

Questions regarding this Administrative Letter should be directed to Jan Moxley, Information and Options Counseling Program Consultant at Jan.Moxley@dhhs.nc.gov.

JMS/JM/pg