## Initiating the OC Process

Individual (person on behalf of individual) contacts or is known to service agency

Staff member provides initial information in response to request or in discussion with person/supporter

One of the following situational elements is found to exist with the individual:

- A life altering personal event or situation;
- A significant change in the individual's circumstances;
- Concerns expressed by the individual or the individual's family member or surrogate decision-maker;
- A life transition;
- A referral or self-referral to Options Counseling; and/or
- Availability of new benefits and supports.

Staff member continues to listen, gather information, provide information, and asks the following questions to seek further clarity on the need for OC

