

Caregiver Consultation Provider Guide

Welcome to the guide for providers of caregiver consultation services. This guide is written to provide information about how to become an MBA-certified caregiver consultant.

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Caregiver Consultation Overview

Caregiver consultation is a personalized, goal-oriented service designed to support and empower family, friends and neighbors caregiving. It involves a collaborative partnership between the caregiver and a trained professional focusing on the caregiver's needs, goals, and challenges.

This service is sometimes referred to by other names. In the Community Based Services Manual, which provides guidance for services reimbursed by Medicaid Home and Community Based Services waivers, the service may be referred to as “Family caregiver counseling” or “Caregiver counseling”. In other situations, some providers might use words like “coaching” or a similar term. However, when these services are funded by the sources discussed later in this document, the service being delivered is caregiver consultation.

Who can provide caregiver consultation?

Professionals who provide Caregiver Consultation are called caregiver consultants. Caregiver consultants who are funded by the National Family Caregiver Support Program (also called Title III-E of the Older Americans Act), a Live Well at Home Grant or a Local and Regional Dementia Grant must meet the Minnesota Board on Aging Title III-E Caregiver Consultant Standards and Competencies.

Caregiver consultants also provide the service called “caregiver counseling” that is funded by the home and community based services (HCBS) waivers for older adults. This service is similar to caregiver consultation but may have slightly different definitions or professional requirements. Information about caregiver counseling can be found in the [Community Based Services Manual](#). The training required to offer this service from the Minnesota Board on Aging is the same as the training for consultants funded through the sources mentioned earlier and described below.

Standards for Caregiver Consultants

The standards for caregiver consultants consist of four parts.

- Professional qualifications
- Online training
- Agreement to follow best practices
- Certain screening reporting requirements

Professional Qualifications

These qualifications apply to caregiver consultants funded by the National Family Caregiver Support Program (also called Title III-E of the Older Americans Act), a Live Well at Home Grant or a Local and Regional Dementia Grant. These professionals must possess the knowledge, skills, and experience necessary to competently perform caregiver consultation service activities, including meeting at least one of the following three options for professional qualification requirements.

1. A bachelor's degree from an accredited program in social work, nursing, counseling, gerontology, health education, rehabilitation therapy, health and human services or a related degree.

And have at least two years of experience using assessment, problem-solving and goal-setting skills with individuals.

2. A Community Health Worker certificate from an accredited Minnesota program.

And have at least two years of experience using assessment, problem-solving and goal-setting skills with individuals.

3. At least four years of experience using assessment, problem-solving and goal-setting skills with individuals.

Online Training

The Minnesota Board on Aging (MBA) offers online training in caregiver consultation. This training is required for professionals delivering the service with funding from all sources. The Caregiver Consultation Training consists of the following courses. These trainings are available on TrainLink.

TrainLink Registration Information

- [TrainLink Home Page](#)
- [TrainLink Frequently Asked Questions \(FAQs\)](#)

Required before beginning caregiver consultation

Core Curriculum

1. Introduction to Caregiver Consultation Training
2. Overview of Caregiving
3. Defining Caregiver Consultation
4. Assessment
5. Planning
6. Common Caregiving Support Needs
7. Standards and Best Practices Agreement

Cultural Responsiveness

1. MBA 201 – Tools for your practice when caring for American Indians
2. MBA 202 – Tools for your practice when caring for Somali Older Adults
3. MBA 203 – Tools for your practice when caring for Latino Older Adults
4. MBA 204 – Tools for your practice when caring for African American Older Adults
5. MBA 205 – Tools for your practice when caring for Hmong Older Adults

Public Benefits Knowledge

1. AASD-EWF1 – Elderly Waiver Foundations 1: Administration and Eligibility

Dementia Knowledge

We will offer trainings in the future for caregiver consultants to prepare them for working with caregivers of people with dementia. The anticipated launch date for these trainings is winter 2026.

Additional Trainings to Enhance Practice:

Facilitation Skills

1. Facilitating a Family Meeting
2. Facilitating a Support Group

Authorization to enroll and complete caregiver consultation training

Before beginning the training, you must request permission by [emailing Minnesota Board on Aging](#). Upon receiving your request, staff will determine eligibility by confirming that you:

- Meet the appropriate professional qualifications
- Are using this training to deliver Caregiver Consultation services through a provider funded by one of the following:
 - National Family Caregiver Support Program (also called Title III-E of the Older Americans Act)
 - Live Well at Home Grant
 - Regional and Local Dementia Grant

And/Or:

- Will be providing Caregiver Counseling to eligible caregivers of people enrolled in Elderly Waiver, Alternative Care or Essential Community Supports.

If none of these apply, you may still request permission to take the training. These requests will be considered on a case-by-case basis.

Staff will give you instructions about how to access the online trainings.

Caregiver Consultation Best Practices

Caregiver consultants funded by Title III-E of the Older Americans Act, Live Well at Home grants, and Local and Regional Dementia grants will agree to follow best practices and will be asked to attest to this during their online training. The best practices for caregiver consultation can be found under MBA policy: [Provision of Title III Services Policy #10: Caregiver Support Services](#).

Caregiver consultants are expected to renew this agreement annually in order to maintain their MBA-certified caregiver consultant status.

Other requirements for caregiver consultation, including certain reporting requirements

In addition to the requirements for professionals offering caregiver consultation, each funding source may have additional guidelines for provider qualifications, assessment procedures and reporting requirements. All caregiver consultation should include a comprehensive assessment as described below. For caregiver consultants who are providing services funded by National Family Caregiver Support Program (also called Title III-E of the Older Americans Act), there are specific requirements for assessment and reporting that must be completed.

Required elements of caregiver consultation assessment

Caregiver consultants **MUST** complete an assessment with caregivers that includes the seven areas of assessment identified as best practice by the Family Caregiver Alliance. More information on assessment and details on each area are available on the [Family Caregiver Alliance website](#).

Assessment Areas

1. Context/Caregiver relationship to care recipient
2. Caregiver's perception of health and functional status of care recipient
3. Caregiver values and preferences
4. Well-being of caregiver (Including required screenings)
5. Consequences of caregiving
6. Caregiver skills/abilities/knowledge to provide care
7. Caregiver resources

Guidelines for completing caregiver consultation assessment

For Caregiver Consultants, these assessment areas should be used as guides when assessing caregivers and adapted to the unique context of each program and situation.

Background on the caregiver and the caregiving situation (context)

- Physical environment (home, facility)
- Household status (number in home, etc.)
- Financial status
- Quality of family relationships
- Duration of caregiving
- Employment status (work/home/ volunteer)

Caregiver's perception of health and functional status of the care recipient

- Activities of daily living (ADLs; bathing, dressing) and need for supervision

- Instrumental Activities of Daily Living (IADLs; managing finances, using the telephone)
- Psycho-social needs
- Cognitive impairment
- Behavioral problems
- Medical tests and procedures

Caregiver's values and preferences with respect to everyday living and care provision

- Caregiver/care recipient willingness to assume/accept care
- Perceived filial obligation to provide care
- Culturally based norms
- Preferences for scheduling and delivery of care and services

Health and well-being of the caregiver

- Self-rated health
- Health conditions and symptoms
- Depression or other emotional distress (e.g., anxiety)
- Life satisfaction/quality of life

Consequences of caregiving on the caregiver

- Perceived challenges:
 - Social isolation
 - Work strain
 - Emotional and physical health strain
 - Financial strain
 - Family relationship strain
 - Difficulties with formal providers
- Perceived benefits:
 - Satisfaction of helping family member
 - Developing new skills and competencies
 - Improved family relationships

Care-provision requirements (skills, abilities, knowledge)

- Caregiving confidence and competencies
- Appropriate knowledge of medical care tasks (wound care, etc.)

Resources to support the caregiver

- Helping network and perceived social support
- Existing or potential strengths (e.g., what is presently going well)
- Coping strategies

- Financial resources (health care and service benefits, entitlements such as Veteran's Affairs, Medicare)
- Community resources and services (caregiver support programs, religious organizations, volunteer agencies)

National Family Caregiver Support Program Caregiver Consultation Required Screenings

Caregiver Consultants MUST ensure that they follow all appropriate data privacy rules before collecting or reporting on any caregiver data. The scores on the following screenings will be entered into the caregiver's record in PeerPlace. Services will not be denied if a caregiver declines to answer these questions or declines to allow their information to be reported in PeerPlace.

Emotional Wellbeing – 1 score

Consultants will use the Zarit Burden Interview Screen (4-item)

- The Zarit Burden 4-item screen results in a single number score.
- The score will be entered into PeerPlace for each assessment.

The following is a list of statements that reflect how people sometimes feel when taking care of another person. After reading each statement, indicate how often you experience the feelings listed by circling the number that best corresponds to the frequency of these feelings.

Statement	Never	Rarely	Sometimes	Frequently	Nearly Always
1) Do you feel that because of your relative that you don't have enough time for yourself?	0	1	2	3	4
2) Do you feel stressed between caring for your relative and trying to meet other responsibilities (work, home)?	0	1	2	3	4
3) Do you feel strained when you are around your relative?	0	1	2	3	4
4) Do you feel uncertain about what to do about your relative?	0	1	2	3	4

Scoring Instructions: Add Items 1-4 Total 1-4 (maximum score = 16) _____

Physical wellbeing – 1 score

Consultants will ask each caregiver the following question, "How would you describe your own health?" Answer options are:

- 1 – Poor
- 2 – Fair

- 3 – Good
- 4 – Very Good
- 5 – Excellent

Consultants will enter the number of the score into PeerPlace.

Social wellbeing – 1 score

Consultants will ask each caregiver the following question, “How often do you feel lonely?” Answer options are:

- 1 - Always
- 2 - Usually
- 3 - Sometimes
- 4 – Rarely
- 5 – Never

Consultants will enter the number of the score into PeerPlace.

Financial wellbeing – 1 score

Consultants will ask the question: “How much of a financial strain would you say that caring for (care receiver) is for you? On a scale of 1 to 5, with 1 being no strain at all and 5 being very much a strain.” Answer options are

- 1 – no strain at all
- 2 –
- 3 –
- 4 –
- 5 – very much a strain

Consultants will enter the number of the score into PeerPlace.