



Application

The Initial Interview Report can be seen as a “SNAPSHOT” of the client’s current situation. The counselor & other rehab team members can review it throughout the rehab process for easy, one-page reference. For example, you can attach it to your referrals for vocational services to quickly familiarize providers with the client’s situation. Likewise, it’s important that you, the writer, accurately *tell the client’s story*.

INITIAL INTERVIEW

Andy

01/15/05

Reason for Referral: Andy is 18 YO high school Senior, referred to Vocational Rehabilitation by his teacher to help him with vocational planning for the future.

Program Notifications: Prior to proceeding with the interview, Andy was provided information regarding the purpose of Vocational Rehabilitation, eligibility criteria, his rights, responsibilities, and remedies. He was provided with a written copy of such information to review with his teacher and parents.

Reported Disability: When asked to describe his disability, Andy replied, *“I tend to be aloof, and sensitive to loud noise, bad smells, bad tastes, and too much light.”* When exposed to these stimuli, Andy states that he becomes distracted and will leave the room. When asked to describe his interactions with others Andy stated, *“I hate to be alone. That’s not my forte.”* When asked how his disability may or may not interfere with his studies including reading and writing Andy replied, *“I read fluently and writing I do very well.”* To be more specific, I asked Andy how he’d do filling out a job application to which he replied, *“I feel very confident with completing job applications.”* When asked if he ever had completed an application he said *“No.”*

Andy’s teacher, who accompanied him to this interview today, stated that Andy benefits from repeated instruction, and that he rarely, if ever, engages in behaviors to seek and maintain friendships with students his age nor does he seem to register or comment when others seem happy, sad, scared or angry. Although he was unable to attend today, Andy’s dad has reported his observations to Andy’s teacher regarding his behavior. He states the Andy is very rigid in his routines. For example, despite multiple instructions, Andy will only wash items with like items, regardless of the color. That is he will only wash shirts with shirts no matter if they are dark or light. This causes consternation between Andy and his mom when Andy stays with her occasionally.

Work History: Andy has no competitive work history. He does work in the school cafeteria as a kitchen aid. Andy’s teacher states that the kitchen staff enjoys Andy. They report that he does best when asked to do one thing at a time, and that he is methodical in



How does Asperger’s Syndrome differ from autism?

Information is key for clients and counselors!

Use your resources:

<http://www.dphhs.mt.gov/vocrehab/vrs/disabilityresourcecenter.shtml>



A skilled counselor will effectively solicit information from clients through open-ended questions and then reflect the “client’s voice” in case notes with direct quotes.

his approach, which slows down his work speed. When asked, Andy reports the job is “okay.”

Functional Limitations/Impediments to Employment: Andy was unable to identify any possible impediments to employment. From feedback from his teacher and observations by this counselor, it appears that Andy will require assistance to prepare for, get and keep a job.

Educational History: Andy is scheduled to graduate this coming June.

Social and Financial Considerations: Andy lives with his father, Bill. He sees his mom, who lives in the same town, frequently. Andy’s teacher reports that both parents appear to be very supportive of Andy, especially his father with whom Andy shares an interest in cars. Andy’s dad provides for all of his expenses.

Client’s Reported Vocational Interests and Goals: When asked, Andy reported he’d like to work as a “janitor, car detailer, computer animation artist, or a cashier at Lucky’s,” a local convenient store. Andy is scheduled to participate in Driver’s Education this coming spring.

Counselor Observation and Actions: This counselor observed Andy to be pleasant in his interactions. He answered questions when addressed, did not interrupt, and was observed to smile occasionally when discussing topics of interest. He did not, however, establish prolonged eye contact. His affect was fairly flat, and his speech mostly monotone. While talking, he was observed to flap his hands or make large, clumsy hand gestures. When asked a question, he often repeated the question aloud over and over before answering it. He was often observed to rock in his chair when pondering his answer and would make occasional explosive sounds with his mouth. His expressive speech was formal and demonstrated a lack of insight; he reported that he does not like to be alone, yet, according to his teacher, he does not seek out friendships. He struggles with his studies, including reading, but reports that his reading is “fluent.” Lastly, Andy was observed to perseverate when answering a question; his explanations were often long and drawn out and he required several prompts to move to a different subject.

A signed release for psycho-educational data was obtained and will be forwarded to Andy’s teacher. Once received, Andy’s case will be reviewed to determine eligibility.

Clyde Caring, MS, CRC
Rehabilitation Counselor



Eligibility Determination

The VR counselor determines eligibility by always asking a series of **KEY QUESTIONS**:

1. Is there evidence of a physical or mental disability?
2. Does the disability prove to be an impediment to employment? In other words, does the disability interfere with the individual's ability to prepare for, secure, and maintain suitable employment?
3. Does the individual *require* services to prepare for, secure, and maintain employment?

The Certificate of Eligibility is documented proof that the questions have been asked and answered.

CERTIFICATE OF ELIGIBILITY

Andy
01/31/05

Andy has a substantial impediment to employment in that the functional limitations resulting from his disability (Asperger's Disorder) significantly interfere with his ability to independently prepare for, secure and, maintain suitable competitive employment. Specifically, Andy requires repeated instruction to learn and retain new work skills and routine. Also, he is unable to independently establish effective interpersonal relationships without coaching; Andy is unable to read social cues and therefore does not modulate his behavior that may be regarded as odd by others, including his employer and co-workers.

Andy requires Vocational Rehabilitation Services, which will include one or more of the following:

1. **Vocational Evaluation** to help Andy identify a vocational direction equal to his interests, abilities, and limitations.
2. **Social Skills Training** geared to help Andy learn rudimentary social skills such as eye contact, greetings, and proper leave taking behavior.
3. **Work Adjustment Training** geared to help Andy develop and practice necessary work behaviors (getting to work on time, as scheduled; taking instruction; getting along with others) and work skills (work quality and work speed).
4. **Selective Job Placement with Limited Coaching** to help Andy secure employment in a supportive environment and to help him develop an effective and efficient work routine, respectively.

Clyde Caring, MS, CRC
Rehabilitation Counselor

LETTER OF ELIGIBILITY

January 31, 2005

Dear Andy:

I'm writing to inform you that you are eligible for services to help you prepare for and get a job. Our next step is to meet and begin the development of your rehabilitation plan. I've scheduled an appointment for us to meet on: **Monday, February 14 at 1 PM.**

If this time is not convenient for you, please call the office (123-4567) to reschedule. If you'd like, your dad is welcome to attend too.

To familiarize you with the process, I've enclosed a copy of the format for the "Individualized Plan for Employment (IPE), and the introduction to the plan entitled, "VR and Client Understandings," which outlines the process to write an IPE, your responsibilities and your rights. You do not have to complete the plan prior to meeting with me. We can work on it together.

Andy, I look forward to meeting with you.

Clyde Caring, MS, CRC
Rehabilitation Counselor



Certification reflects evidence that:

- ❑ The eligibility determination occurred within 60 days of application date.
- ❑ A physical or mental impairment proves to be substantial impediment to employment.
- ❑ At least one significant service is required to overcome impediment to employment.



Assessment & Planning

In this phase, we help clients engage in exploration to help them discover their **DESTINATION** (vocational goal) and the **PROVISIONS** (services and supplies) they *require* to get there.

CASE NOTE

Andy
02/14/05

Andy and his dad (Bill) were in today as scheduled to begin the development of his rehabilitation program. To begin, this counselor explained the process of identifying a compatible vocational direction and the services Andy will require to get there.

Again, counselor asked Andy to identify his vocational interests. His interests remain broad and vague. His dad reports that Andy is “very artistic.” Andy added, “I can create things very well.” When asked to identify a job wherein he could use his artistic talents, Andy was unable to identify any. Andy also indicates he may be interested in attending school, although he does not know what he’d study.

Given the range of interests and directions expressed by Andy in our initial interview, counselor suggested that Andy participate in a vocational evaluation geared to help him clarify his interests and identify his strengths. After hearing the procedure and benefits of the evaluation, Andy chose to participate. He and his dad were given written information about the evaluation units in town. They chose to work with Jobs R Us because it is close to their home enabling Andy, who does not yet have his license, walk to and from the evaluation.

Andy is scheduled to begin his evaluation on **February 28, 2005**. A referral packet including release and authorization was completed on this date.

Clyde Caring, MS, CRC
Rehabilitation Counselor

VOCATIONAL EVALUATION STAFFING

Andy
03/04/05

Andy, his father, the vocational evaluator (Ellie), and this counselor met today to review the results and recommendations of Andy’s evaluation. Throughout the evaluation, Andy was cooperative, followed the schedule, and appeared to be doing his best. He was able to follow a diagram, see slight flaws in machine parts, and perform manual-mechanical tasks. Physically, Andy, who is overweight, was able to endure 6 hours of testing per day; he reported that it felt good to be active.

Andy demonstrated lower aptitudes in math problem solving, reading comprehension, and language skills. He demonstrated difficulty with problem solving as evidenced by negative comments and obvious signs of frustration. He performed better when tasks were more routine, requiring minimal problem solving. He did not greet people upon arriving to the eval unit each day and did not use civilities like please and thank you on a consistent basis. Andy often went overboard with his explanations, which may impact his social interactions with others. The evaluation confirmed that Andy learns best through repeated instruction. Andy was somewhat surprised that academic levels were low and that they would likely make post secondary education more difficult.



What are the resources for Vocational Evaluations in your area? What’s the referral process?



Managing essential information for many clients is a challenge! One way to draw attention to essential information is to use highlighting in your case notes. Notice how Clyde highlights the date of the next appointment at the end of all case notes. With a quick glance he knows when he’ll next meet with the client and so will his supervisor who may be reviewing the case or standing in for him in his absence.

Ellie recommends Andy participate in a community work experience to help him gradually acclimate to competitive work and to allow him the opportunity to practice his skills. After the work experience, selective job placement assistance with limited job coaching was recommended over formal education. Given his expressed fondness for working with cars, vehicle cleaner as well as auto parts clerk, and auto merchandise stocker, may be suitable vocational directions for Andy. Additional alternatives include grocery bagger, prep cook, and laundry worker. (See Vocational Evaluator's Report.)

Lastly, it was recommended that Andy use his remaining semester of high school to practice his independent living skills such as budgeting, shopping, cleaning, and driving. Andy and his dad are in agreement with this recommendation.

Andy and his dad were asked to consider when and where he would like to participate in his work experience. After discussion, the following options were discussed:

1. Community work experience with local employer during the school year.
2. Crew based work experience on the Car Wash Crew at Jobs R Us during the school year.
3. One of the above following graduation in June.

Andy, his dad, and this counselor are scheduled to meet again on **March 22, 2005** at **10** to discuss his decision. Should Andy be ready to proceed, an IPE will be completed on that date. If not, the case will be placed on hold until after graduation.

Clyde Caring, MS, CRC
Rehabilitation Counselor

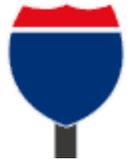
CASE NOTE

Andy
03/22/05

Andy did not show for his appointment today. Counselor phoned after 4 and was able to speak with Andy who was home from school. Andy forgot his appointment. When asked, he reports that he does not want to start work related activities until after graduation. His dad, who joined our phone conversation, is in agreement with that decision. Andy will schedule an appointment to meet with this counselor following graduation.

Clyde Caring, MS, CRC
Rehabilitation Counselor

RATIONALE FOR GOAL AND SERVICES



Andy
06/22/05

Andy was in today, with his dad to complete his rehabilitation plan. An IPE outlining required services was completed on this date.

CLIENT PERSPECTIVE: Andy has chosen **auto detailer** as his vocational goal stating, “*I love cars and I want to work with them. It just makes sense.*”

GOAL COMAPTIBILITY: Given Andy’s stated interests, and his demonstrated abilities in his recent vocational evaluation, it appears that he has chosen a suitable vocational goal.

SERVICE RATIONALE: Andy requires social skills training to help him develop and practice conventional interpersonal skills, which in turn, will help him to get along better with others on the job site. He requires selective job placement assistance with limited coaching to help him secure and maintain employment. These selective employment services are not available to him elsewhere. With this assistance, it is expected that Andy’s impediments to employment will be mitigated enabling him to get and keep a job.

EMPLOYMENT OUTLOOK: The availability of Auto Detailer positions is good. According to the state labor market statistics for this area, there is moderate turn over in this job with 20 openings in the last year.

FINANCIAL CONSIDERATION: Andy’s dad provides for his room and board and will allow Andy to continue living at home until he is stable on his job, has saved money for rent, and is ready to move out on his own. His dad does not want him to move out prematurely.

CLASSIFICATION OF DISABILITY/ORDER OF SELECTION:

This individual has a significant impairment that seriously limits him/her in the one or more of the following functional capacities:

- Mobility**--Insufficient ability to independently move about within common training/work settings without accommodations
- Motor skills**-- Insufficient ability to control & coordinate fine and/or gross motor movements relative to work; inability to perform at competitive work pace.
- Communication**-- Insufficient ability to understand communications relative to work, or to be understood.
- Self-Care**-- Insufficient ability to independently carry out the essential activities of daily living required to engage in work.
- Self-Direction**--Insufficient ability to independently regulate behavior or engage in independent decision-making, reasoning, or judgment required to get and keep a job.
- Interpersonal Skills**—Insufficient ability to properly interact with others and/or avoid conflicts which interfere with ability to get & keep work.
- Work Tolerance** –Insufficient endurance or ability to sustain consistent and competitive physical and/or mental work effort.
- Work Skills** –Insufficient ability to independently follow instructions and to learn and retain work skills

and this individual is likely to **require multiple services** over an **extended period of time** (more than 6 months) to secure and maintain suitable employment. Therefore, this individual is considered to live with a:

- Significant Disability**
(1 to 2 functional capacities)
- Most Significant Disability**
(3 or more functional capacities)

The Rationale document demonstrates that the counselor has considered the feasibility of the IPE strategy to overcome impediments. It provides evidence that...

- Andy’s goal is compatible with his expressed interests, concerns, priorities, demonstrated strengths, abilities, and that...
- Andy requires the identified services to achieve his goal, and that...
- Andy was provided information enabling him to make an “informed choice” regarding his services and the vendors with whom he chose to work.

Clyde Caring, MS, CRC
Rehabilitation Counselor



IPE Initiation & Follow Along

The IPE is the **ROAD MAP** to the client's goal or destination. It outlines the route (what the client and the VR program will do to the client achieve his goal) and the ETA (estimated time of arrival or goal end date). Clients and counselors can avoid getting lost with frequent referral to the map!

INDIVIDUALIZED PLAN FOR EMPLOYMENT

Name: *Andy*

Plan Date: *06/17/05*

My work goal: *Auto Detailer*

Date to complete goal: *06/17/06*

We have agreed the following services are required:

Service(s)	Responsible Party	Amount	Provider(s)	Dates of Service(s)
Social Skills Training	Voc Rehab	\$200	Olivia OT	06/05-08/05
Work Experience	Voc Rehab	\$800	Jobs R Us Car Wash Crew	06/05-08/05
Job Placement Services	Voc Rehab	\$1000	Deb Getjobb	06/05-06/06
Job Coaching	Voc Rehab	\$500	Cody Coach	06/05-06/06

Additional community and financial resources I will use to help me achieve my work goal:

My dad will continue to provide for my room and board until I'm stable in a job and am ready to move out on my own.

My responsibilities in showing progress toward my work goal:

- 1. I will meet with Olivia (Occupational Therapist), every Monday for the next 4 weeks to learn and practice social skills including eye-contact, the consistent exchange of greetings & use of words like "please," "thank you," and "excuse me."*
- 2. I will report to work on the car wash crew, as scheduled, and will work to achieve 85% (or better) on my work quality and speed by July 30, 2005.*
- 3. I will meet with Deb (Job Placement Specialist) every Thursday at 3 PM and will follow through with all recommended job related activities (filling out applications, preparing for interviews, attending interviews) until I'm employed.*
- 4. I will meet with Cody (Job Coach) on my job site to learn my new work tasks and routine until I'm performing up to my employer's expectations.*



An IPE that is accountable to the Rehab Act provides evidence that...

- all services are prior authorized and provided within the timeframe specified by the service start dates and the *goal end date*...
- comparable benefits and resources are explored...
- client responsibilities (objectives) are written in clear and measurable terms...
- Progress Review Schedule is clear, adherence to which will be reflected in subsequent Case Notes...

I understand that my failure to comply with these responsibilities will result in interruption of services, alternative planning, or case closure.

Schedule for Reviewing Progress: *My placement specialist and I will meet with Clyde once every 60 days to review my progress until I'm employed. Once employed, I will continue to receive assistance until I'm performing my job to my employer's expectations and feel satisfied with my job. Once employed, I understand that my case will remain open for 90 days to ensure my job satisfaction and success. Our first review appointment: August 17, 2005 AT 10 AM.*

INDIVIDUALIZED PLAN FOR EMPLOYMENT

-Page 2-

VR Counselor Considerations:

- 1. Are Post Employment Services needed? YES NO
- 2. Are Extended Employment Services needed? YES NO NA
 If Extended Employment Services are needed, please describe the required services and identify the extended services provider.
- 3. Have VR goals, objectives and services been coordinated with the student's Individualized Educational Plan (IEP)? YES NO NA

Methods for providing or procuring goods and services: The Vocational Rehabilitation program can provide vocational services directly. In addition, the agency can use purchase orders to procure goods and services from approved vendors. The bidding process is used when appropriate to purchase goods at the best available price. Comparable benefits, when available (resources from other programs or agencies), are utilized to meet rehabilitation needs. All services are provided in accordance with the Financial Need Standard specified by the Vocational Rehabilitation Program.

My comments about this plan:

"I chose auto detailer as my vocational goal because I love cars and want to work with them. It just makes sense."

By signing this document I understand and commit to the responsibilities in my Plan. I have been given the opportunity to make informed choices about my work goal, the vocational services needed to achieve it, providers of the goods and services, and the methods available for procuring the services. I received a copy of this Individualized Plan for Employment (IPE) in a format that was understandable and appropriate for me.

If applicable, I was offered the opportunity to assign my **Ticket to Work** to Vocational Rehabilitation. YES NO NA

Client: Andy

Date: 032205

Counselor: Clyde Caring

Date: 03/22/05

- the client was informed of the availability of Post Employment Services ...
- Extended Employment Services, if applicable, were addressed ...
- VR coordinated services with school personnel to assist students who are transitioning from school to work & that there was opportunity to complete an IPE before graduation...
- the client was involved in the development of the IPE (see "My comments..") and that...
- the IPE was developed within 120 days of date of application, or if not the case record justifies an extension of plan development time.

WORK EXPERIENCE STAFFING

Andy

08/17/05

Andy, his dad, his OT (Olivia) and his job coach (Cody) met with this counselor to review Andy's progress with his Social Skills training and to review the results of his work experience at the car wash.

Andy missed one of four appointments with Olivia. With frequent prompts, Andy has demonstrated progress with his social skills. However, his dad reports that Andy does not seem to generalize them to the home environment. Since Andy is able to tell his dad when it is appropriate to use words like "excuse me," he does not always use them. It is unclear if he is choosing not to use the words or still requires instruction. All parties have agreed to help Andy be consistent by prompting him as necessary.

Andy missed 5 of 20 work days on the crew. One day he reported to the coach, who called his home, that he didn't think he had to come into work because it was raining. Another time, he told his coach that he had to leave early for a doctor's appointment. Andy's dad reported that Andy did not have a doctor's appointment. On another day, Andy walked off the job without telling anybody. The coach was able to reach him at home by phone. Andy reported he'd be in to work the next day, but did not show.

When he showed for work, Andy had difficulty following the prescribed work protocol. He was shown how to vacuum the cars and then instructed to help with windows after he was done vacuuming. However, Andy insisted that he had to vacuum *all* the cars before helping with the car windows. He was not readily able to stop one task and start another, even though he only had two tasks to do. He would demonstrate great frustration when he was prompted to stop vacuuming. He'd wring his hands and reiterate over and over that he had to vacuum all the cars first, which was disruptive to the workflow. He also was observed to bump into other employees when working. Although, his actions were not regarded as intentional, Andy did not extend the courtesy of saying, "Excuse me."

Andy's work quality was 100%, but his speed was 45%, a non-competitive level. His quality is good because he is very thorough when vacuuming or doing windows. However, his speed is poor because he is reluctant to try alternative methods as advised by his coach. On occasion, Andy seemed to indulge his coach by doing the job as prescribed. When he did it the recommended way, he speed increased and his quality remained excellent. However, whenever Cody was not watching Andy, he reverted to his old routine.

Given his poor attendance and reluctance to adjust his behavior, this counselor asked Andy if he wants to work at this time. He emphatically stated, *"Yes! I don't want to sit around all day and do nothing!"* Counselor then asked Andy if he is willing to listen to his coach and his OT and do things differently to which he responded, *"Sure, I suppose. It's difficult for me, you know, but I'll try."* Likewise, counselor suggested an extension of Andy's work experience to offer him the opportunity to improve and practice. Andy, his dad and his team are in agreement with the extension. To ensure Andy's understanding of the expectations before him, we once again reviewed the responsibility statements in Andy's

IPE. He is aware that a failure to follow through may result in an interruption of services or case closure.

We agreed to meet again in one month, **September 17, 2005** to discuss Andy's progress.

Clyde Caring, MS, CRC
Rehabilitation Counselor

PROGRESS REVIEW

Andy
09/01/05

Cody phoned today to report that Andy has not been showing to work again. Also, he continues to have difficulty doing the job as he's supposed to with any consistency. Given this information, counselor phoned Andy and his dad today. Andy states he has decided that he is not ready for work at this time and that he'd rather help his dad out around the house. Andy's dad concurs with Andy's decision and states they will continue to work on his independent living skills and driving.

For now, we agreed to close Andy's case. Andy and Bill were informed that Andy is welcome to reapply once he is ready.

Clyde Caring, MS, CRC
Rehabilitation Counselor



Rehabilitation Outcome

In a successful case closure (26), the client's achievement of her goal and VR's contributions to that accomplishment are documented. In this case, a congratulatory handshake is in order! Sometimes, however, despite our best efforts, successful outcomes don't always occur. Sometimes clients relocate & other times life circumstances interfere. Either way, a respectful and courteous exchange between client & counselor, wherein the client knows she is welcome to reapply, is always desirable.

CLOSURE LETTER

September 1, 2005

Dear Andy:

I'm glad I was able to visit with you and your dad today. In our conversation, you informed me that you are not ready to work at this time. Therefore, you, your dad, and I agreed to close your case for now. However, please remember that you are welcome to reapply at any time.

Andy, I wish you the best and hope to see you again in the future. Until then, take care.

Sincerely,

Clyde Caring, MS, CRC
Rehabilitation Counselor

CC APPEAL RIGHTS



Case documents such as a [Closure Summary](#) and/or the [Closure Letter](#) must provide evidence that...

- ❑ the client achieved the goal outlined in the IPE and that the goal remains suitable...
- ❑ the client expressed satisfaction with the job in a direct consultation between the client and the counselor and is in agreement with case closure...
- ❑ services made a significant contribution to the achievement of the goal...
- ❑ the client has maintained the job for at least 90 days...
- ❑ the client is earning a customary wage and that the client is being compensated at or above minimum wage, and that...
- ❑ the client has been informed of Post Employment services.