

**Department of Disabilities, Aging and Independent Living
Division of Vocational Rehabilitation**

Procedure/Process Name: Case Record Reviews- Regional Managers & Senior Counselors	Issue Date: August 1, 2018
Prepared/Revised by: Amanda Kohle, Quality Assurance Manager	Revision Date:

Process Description & Introduction: This case review process was designed to help provide guidance to both counselors and supervisors as to best practices for case work. The intention is to establish a level of consistency in case management practices while still allowing room for each counselor's stylistic preferences. Case reviews also gauge how well VR staff follows policy & RSA practice standards required by Federal VR regulations, using a standard case review tool. The first section of this tool is to be used to review cases for basic RSA compliance. This compliance tool allows reviewers to check off whether this requirement has been met and a few will offer a text box if further clarification is warranted. Questions regarding basic compliance items should be directed to the Quality Assurance Manager. The second section examines the qualitative aspects of the casework. It provides a rating scale to help counselors and reviewers know what unsatisfactory, satisfactory and excellent case work includes.

Process Objective(s):

- Establish a standard and consistent, statewide case record review process for Regional Managers and Senior Counselors.
- Address systemic compliance challenges from audit findings.
- Provide guidance to counselors around best case management practices within AWARE.
- Give staff data and guidance regarding compliance with the law and regulations that authorize our program.
- Provide a framework for counselors around Career Initiative activities.

Steps:

1. Central Office will generate a list of cases to be reviewed by supervisors (Regional Managers and Senior Counselors) on a quarterly basis. The list will be a random sample of *5 cases per counselor* per quarter.
2. Reviewers will be notified of the list of selected cases on the first business day of each quarter, starting October 1, 2018. (January, April, July, October)
3. Supervisors will complete the *Case Record Review* form within AWARE for each case selected by the 15th of the last month of the quarter. (March 15, June 15, September 15, December 15).
4. Regional Managers and Senior Counselors will incorporate the results of case record reviews into their 1:1 supervision meetings. They have flexibility around how they complete the tool as well as the way in which they share the results with counselors. Supervisors are encouraged to take into consideration both their personal supervision styles and the learning styles and preferences of their supervisees.

Department of Disabilities, Aging and Independent Living

Division of Vocational Rehabilitation

5. Quality Assurance Manager will review the results from each district on a quarterly basis and note statewide trends (compliance issues, training needs, strengths, etc.)
6. Quality Assurance Manager will send Regional Managers district specific reports twice per year (April and October), beginning April 2019. Reports will include aggregate results from quarterly case record reviews, as well as a summary/interpretation of those results.
7. Quality Assurance Manager will schedule follow-up phone calls with those districts who have questions or would like further clarification regarding their district reports.

**Department of Disabilities, Aging and Independent Living
Division of Vocational Rehabilitation**

CASE TYPE: GENERAL/STW VR CASE

REVIEW TYPE: BASIC COMPLIANCE

AREA OF REVIEW	SCALE (e.g. Yes/No/NA or graduated scale, I assume this can be graduated)	MILESTONE ITEM (This is a basic compliance item that would cause an audit finding)	DATA QUALITY ITEM (inaccurate or incomplete data would affect 911 reporting and/or Common Performance Measures)
ELIGIBILITY			
1. Are all appropriate releases signed and uploaded?	Yes/No	Yes	No
2. If Supported Employment, was SE provider identified in "Special Programs" at application?	Yes/No/NA	No	Yes
3. If there were case service expenditures prior to eligibility determination, were those expenditures documented in a case note as in support of an eligibility determination?	Yes/No/NA	Yes	No
4. Was eligibility determined within 60 days?	Yes/No/NA	Yes	Yes
5. If eligibility was not completed within 60 days, is a reason for the extension documented?	Yes/No/NA	Yes	Yes

**Department of Disabilities, Aging and Independent Living
Division of Vocational Rehabilitation**

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6. Does the case record contain documentation to justify eligibility and the need for VR services to secure, retain, or regain employment?	Yes/No	Yes	No
7. If consumer presumed eligible because of SSI/SSDI receipt, is there documentation to verify?	Yes/No/NA	Yes	Yes
8. If there were case service expenditures prior to IPE, were those expenditures part of an assessment in support of plan development and documented by a case note?	Yes/No/NA	Yes	No

**Department of Disabilities, Aging and Independent Living
Division of Vocational Rehabilitation**

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IPE DEVELOPMENT			
1. Is a signed IPE Pre-Print (VR 12.1) uploaded to AWARE?	Yes/No/NA	Yes	No
2. Is the IPE Pre-Print signed prior to or on the date the IPE was signed by the consumer/guardian?	Yes/No/NA	Yes	No
3. Was the IPE completed within 90 days of eligibility certification?	Yes/No/NA	Yes	Yes
4. If the IPE was not completed is a reason for the extension documented?	Yes/No/NA	Yes	Yes
5. If individual was a high school student at application was the IPE completed prior to high school exit?	Yes/No/NA	Yes	Yes
6. If a Supported Employment case, did the counselor select a SE IPE using the check box?	Yes/No/NA	Yes	Yes
7. Was the IPE signed by the consumer/guardian and uploaded to AWARE?	Yes/No/NA	Yes	No
8. Was the most recent IPE annual review completed?	Yes/No/NA	Yes	No

**Department of Disabilities, Aging and Independent Living
Division of Vocational Rehabilitation**

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9. Any IPE amendments were discussed with, and agreed upon with the consumer, as documented in a case note?	Yes/No/NA	Yes	Yes
10. If the amendments entailed changing the employment goal or deleting a service from the plan, the amended plan was signed by the consumer/guardian and uploaded to AWARE.	Yes/No/NA	Yes	Yes
11. If case is a Supported Employment case, are supported employment services on the IPE?	Yes/No/NA	Yes	Yes
12. If this case is a Think College, College Steps, or SUCCEED case was Ed Academic Credential Programs added as a service?	Yes/No/NA	Yes	Yes
13. If a Project Search case, was Work-Based Learning Special Programs added as a service?	Yes/No/NA	Yes	Yes
14. If the consumer obtained a credential from a program other than a Post Secondary	Yes/No/NA	Yes	Yes

**Department of Disabilities, Aging and Independent Living
Division of Vocational Rehabilitation**

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Education program (ie. LNA, CDL, Servsafe, etc.), a copy of the certificate or other documentation is attached to the case.			
15. If the consumer participated in a form of progressive employment that resulted in a measurable skill gain (OJT or apprenticeship), form 20.4 is attached to the case to provide verification of the activity. 16.	Yes/No/NA	Yes	Yes
FINANCIAL			
1. Did the counselor sign off on all non-grant invoices?	Yes/No/NA	Yes	No
2. Are there receipts or counselor verification for all expenditures?	Yes/No/NA	Yes	No
3. Did the expenditure amount stay within the authorized IPE maximum amount?	Yes/No/NA	Yes	No
CLOSURE			
1. Does the case file include a closure letter and documentation	Yes/No/NA	Yes	No

**Department of Disabilities, Aging and Independent Living
Division of Vocational Rehabilitation**

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confirming consumer notification of appeal rights and the availability of CAP?			

Guidance for Qualitative Case Review Questions

Guidance for General and STW Cases:

1. Does a complete initial interview give a holistic picture of the consumers barriers, strengths and interests?

Unsatisfactory: Case lacks information that helps to provide a clear picture of the consumers vocational goals and disability. Sections of the initial interview are left blank with no explanation of why.

Satisfactory: Initial interview sections are filled out completely and include information that is relevant to the consumers need for VR services and possible employment goals. Sections of the initial interview that are not applicable are noted as such (ex. Consumer has no physical barriers to employment- counselor has noted this is not a concern; field is not simply left blank). The information in each section helps to inform and support the consumers eligibility and need for VR services.

Excellent: Each section of the initial interview is completed thoroughly with specific and detailed information that contributes to the consumers overall story as it pertains to employment. The information provides a holistic snapshot of the consumers situation during their first engagement with VR services. There is evidence that the counselor utilized Motivational Interviewing to elicit information regarding the consumers knowledge, skills, abilities and potential barriers to employment. There is information specific to potential ideas the consumer has relating to possible short and long-term career goals.

2. Does the case show consistent contact/ engagement efforts by the VR and/or VABIR staff?

Unsatisfactory: There is no evidence of consistent contact with the consumer by either the VR counselor or VABIR staff. The case shows little or no documentation to suggest that VR or VABIR staff made attempts to connect or re-engage with the consumer for a period of one month or longer.

Satisfactory: Case shows at least monthly contact with the consumer by the VR counselor and/or VABIR staff, either in-person, by phone, email or text correspondence. These contacts are documented within a case note. Efforts to re-engage a consumer are also documented either by case note or a copy of a letter sent to the consumer.

**Department of Disabilities, Aging and Independent Living
Division of Vocational Rehabilitation**

Excellent: Case shows monthly contact with consumer by VR counselor and/or VABIR staff as documented within a case note. These case notes clearly outline the purpose of the meeting, the consumers input and any next steps for both the consumer, counselor, employment consultant or other partnering agency staff.

Example: "Courtney and I touched base today at school today. C is back at Harwood this semester as she did not feel like having a co-op through the tech center her second semester was the best way to spend her final year of high school. C only has two academic classes a day and recently started an internship with Moving Pictures Division- in Waterbury. The employment specialist at Harwood helped C connect to them and set up this internship. She is currently their "Social Media Manager" and reports that she loves her time there. C is still working part time at Cold Hollow Cider but is very motivated to find a new part time job; she is planning to attend the Central VT Job Fair on 4/4 with the employment specialist from school. C and I will meet again on 3/27 to discuss possible questions she would like to ask employers at the Job Fair. C will review the Central VT Job Fair web site before our meeting."

3. Does the case include relevant assessments to help determine consumer goals/ career pathways?

Unsatisfactory: No assessments are located within the consumers case and there is no documentation to explain why an assessment was not needed. There is no documentation that the VR counselor had discussed potential assessments with the consumer.

Satisfactory: Case includes at least one completed vocational assessment and its results, unless the VR counselor has described why the consumers case would not benefit from an assessment. Assessments are scanned and entered as an attachment or otherwise attached to the consumer's case.

Excellent: Case includes assessments that contribute to the development of the consumer's short and long-term employment goals. These assessments are accompanied by a case note that shows that the consumer and the administrator of the assessment met to review the results and discuss how they may inform the next steps in the VR process. If the assessment is the result of a progressive employment activity, a case note or other appropriate form of documentation is provided by the supporting employment staff. If the counselor and the consumer deem that no assessments are necessary, there is a case note or other documentation that describes the reasoning behind this decision.

**Department of Disabilities, Aging and Independent Living
Division of Vocational Rehabilitation**

4. Do the case notes tell an adequate story for the agency including both vocational and rehabilitation elements of the case?

Unsatisfactory: Case notes are too generic or absent. Notes lack any detail that help to provide context regarding VR services that have been or will be provided to the consumer and the consumers employment goal.

Satisfactory: Case notes portray a comprehensive narrative of the person’s vocational history, as well as aspirations, and should be used to document all activity in the case. Information around the disabling conditions as they pertain to work or work-related activities are clearly described. Next steps for both the counselor and consumer are stated including: date and time of next appointment, planned follow up, and agreed upon tasks for consumer. For Supported Employment cases, the VR counselor has attached case notes from the Supported Employment Consultant that document the consumers progress towards their employment goal.

Excellent: Case notes describe the consumer and their current situation from a strengths-based perspective and document all activity in the case. Information regarding the consumer’s past work history, educational attainment, employment goals and aspirations are clearly outlined in notes throughout the life of the case. Information regarding the consumer’s disability or barriers to employment are addressed. The case notes give a clear voice to both the consumer and counselor and outline agreed upon next steps for each meeting. Case notes show that the counselor made any and all appropriate referrals to other agencies and that proper releases for current providers were obtained. Case shows evidence that counselor has connected with other providers that are supporting the consumer, with the consumer’s permission, and when it is in support of the vocational goal. Case notes describe planned follow up activities for the counselor, consumer, and other partnering staff. Date and time of next appointment, follow up activities and next steps are outlined. Counselor has utilized a method for outlining any follow up activities for consumer in a format that is accessible to them. Finally, there is evidence that the counselor utilized the spirit of Motivational Interviewing in all interactions with the consumer. For Supported Employment cases, there are case notes or other documentation that show that the VR counselor and Supported Employment Consultant are working together to team the case to help the consumer work towards their employment goals. These notes also indicate the team’s plans to address any disability-related barriers to employment and next steps for the consumer and other team members.

Example: “Jerry stated that he has both the interest and ability to become an LPN, and assessments gathered so far support his contention. He indicated his anxiety and depression have been historical barriers from moving forward with this plan. This VRC proposed a joint meeting with his therapist to explore the particular environmental “triggers” where his symptoms arise, with a plan of what to do “in the moment” when such triggers are activated.”

**Department of Disabilities, Aging and Independent Living
Division of Vocational Rehabilitation**

5. Are VR expenditures well documented in the case narrative?

Unsatisfactory: Expenditures are not connected to services listed in the IPE and there is no documentation to support the need for the expense.

Satisfactory: Expenditures are noted in the IPE. There is documentation that the counselor considered all other comparable benefits before authorizing VR funds.

Excellent: Expenditures are listed in the IPE and a case note provides the context of the expenditure and how it is relevant to the consumers employment goal. There is evidence that the counselor explored any other comparable benefits that may have been available to support all or part of the expense before authorizing VR funds.

Example: “Jane has long-standing orthopedic challenges since childhood where specialty shoes are needed. The physical plant of her job requires that she walk from one end of the campus to another at least three times per day. Her orthopedist recommended shoes which cost \$350. After some research and checking in with her insurance provider to see if they would cover a portion of the purchase, we were able to find a suitable pair that would meet her needs for \$250.”

6. Is the work of internal and external partners well documented in the case narrative?

Unsatisfactory: Counselor has identified that the consumer is engaging with a Supported Employment Program either at application (Supported Employment provider was identified in “Special Programs” section) or at time of IPE completion (Supported Employment provider is listed in services section) but no other supporting documentation has been provided (i.e.. No case notes or releases for providers).

Satisfactory: If the consumer is working with any internal or external partners, case notes document the collaboration as it applies to the case. Releases for each partner agency have been signed and are attached to the case.

Excellent: If the consumer is working with any internal or external partners, the case includes documentation that outline their work with the consumer and how it will impact the consumer’s progress towards employment. These case notes include the name of the person that is the main point of contact for the consumer and signed releases for each agency are attached to the case. When appropriate, case shows evidence that counselor has connected with the partner agencies to collaborate and combine resources in support of the employment goals.

**Department of Disabilities, Aging and Independent Living
Division of Vocational Rehabilitation**

Example: “Bill was recently awarded SSDI and referred to the Benefits Counselor in the office by this counselor. After meeting with the Benefits Counselor, Bill was informed that during his first year he cannot earn more than \$1,180 a month without impacting his benefits. Bill is still in the process of working with his physical therapist to determine his functional limitations regarding lifting and bending so his SSDI is currently his only form of income. The counselor and Bill have a meeting set up with his Employment Consultant to discuss next steps in his work search.”

7. Is the information gained through progressive employment and progressive education activities documented in case notes by VR and/or VABIR staff?

Unsatisfactory: There is evidence that the consumer participated in either a supported employment or progressive education activity, but no supporting documentation is included in the case to give context or details regarding the type of activity and outcome.

Satisfactory: Progressive employment and progressive education activities are documented in case notes by either the VR or VABIR staff. Notes give information regarding the type of activity that was performed, where, when, and the results. These progressive employment activities are documented under the “Job Search Activity” category; progressive Education activities should be recorded in an Educational Goal.

Excellent: Progressive employment and progressive education activities are documented in case notes either by the VR or VABIR staff that worked with the consumer during the activity. Notes give information about the type of activity that was performed and how it pertains to the overall employment goal. Information regarding the time, place and outcome of the activity are stated. For a progressive employment activity, feedback from the employer or partner was obtained and is also documented within the case. For General and STW cases, progressive employment activities are documented under the “Job Search Activity” category and for PAS cases they are recorded as an “Actual Service”. Progressive Education activities should be recorded in an Educational Goal for cases.

Example: “Ryan met with D (Shaw's Personnel Coordinator) Amber (weekday cleaner) and myself. R came prepared with the list of questions we brainstormed. The info interview went well and Ryan is interested in applying for the cleaning assistant position. D suggested that he goes through the normal application/hiring process. After that she'd like to schedule times for him to shadow with Amber. His work schedule can be flexible and there is an opportunity for him to start with a few hours at time and then increase when he feels comfortable. R may benefit from support with memorizing his social security number, locating I-9 documents and learning about direct deposit. Ryan has his learner's permit and drove himself home with his mom as a passenger.”

**Department of Disabilities, Aging and Independent Living
Division of Vocational Rehabilitation**

8. Are consumers who are employed receiving monthly check-ins/ outreach by either VR or VABIR staff, as documented in case notes?

Unsatisfactory: Case does not contain any notes or other documentation to demonstrate that either the VR or VABIR staff have maintained monthly contact with the consumer.

Satisfactory: Case notes document monthly outreach to consumers from either the VR or VABIR staff regarding consumers employment status.

Excellent: Case notes document monthly outreach to consumers either by VR or VABIR staff. Notes document current status of employment and any support consumer may need. VR and VABIR staff gather information regarding job satisfaction, possibilities for promotion and possible opportunities for further training or education.

**Department of Disabilities, Aging and Independent Living
Division of Vocational Rehabilitation**

CASE TYPE: Pre-Application Status (PAS)

REVIEW TYPE: COMPLIANCE

AREA OF REVIEW	SCALE (e.g. Yes/No/NA or graduated scale, I assume this can be graduated)	MILESTONE ITEM (This is a basic compliance item that would cause an audit finding)	DATA QUALITY ITEM (inaccurate or incomplete data would affect 911 reporting and/or Common Performance Measures)
Is the Pre-ETS Referral form completed, including disability information and 504/IEP status, and signed by the counselor prior to actual services being provided?	Yes/No	Yes	Yes
Is the Pre-ETS Release form completed, signed, dated, and contain the student's social security number prior to doing any WBL activity outside of school/offsite that VABIR is supporting?	Yes/No/NA	No	Yes
Does the social security number on the Pre-ETS Release form match what's entered in AWARE?	Yes/No/NA	No	Yes
Has a VABIR release been completed, signed by the consumer and/or parent/guardian and uploaded to AWARE, prior to VABIR providing offsite services?	Yes/No/NA	Yes	No
Is all the appropriate application data entered into AWARE (application and referral dates, living	Yes/No	No	Yes

**Department of Disabilities, Aging and Independent Living
Division of Vocational Rehabilitation**

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arrangement, referral source, veteran status)?			
Have the education goals been documented in AWARE, including at least one completed goal and one goal in progress?	Yes/No	No	Yes
If Actual Services have been done, has at least one of them been documented in AWARE each quarter that the case has been open?	Yes/No	Yes	Yes

**Department of Disabilities, Aging and Independent Living
Division of Vocational Rehabilitation**

Guidance for PAS Cases:

1. Does the case contain at least one case note describing the counselor's intention for placing consumer in PAS status?

Unsatisfactory: Case does not contain any notes that describe the counselors reasoning for opening the consumer in a PAS status.

Satisfactory: Case contains at least one case note that describes the counselors reasoning and thought process for opening the consumer on the PAS caseload.

Excellent: Case contains at least one case note that describes the counselors reasoning and thought process for opening the consumer on the PAS caseload. This note, or notes, describe the consumers expected level of engagement with VR services, possible next steps, and any identified goals. There is also evidence that the counselor has discussed the process of moving the consumers case to the STW caseload, what that entails, and the estimated timeline for transition to that caseload.

Example: "John and this counselor met for the second time at his school today. This counselor and John spent their first meeting discussing a general overview of the types of services VR provides to students. John is a sophomore this year and at the meeting today expressed some interest in beginning to develop his resume and practice some interviewing skills. This counselor described the student group that the YES is running at their school and John is very interested in participating. Because John is interested in participating in this group, this counselor filled out a referral and placed John in a PAS status. This counselor will continue to discuss the other potential services available to John if and when it is appropriate to open his case on the STW caseload."

2. If the PAS case has been open for three (3) months or longer, there is documentation of at least one actual service being provided by either VR and/or VABIR staff.

Unsatisfactory: There is no documentation in the case showing that any actual services that have been provided.

Satisfactory: An actual service is documented in the case. The note describes the delivery of an actual service to the consumer within three (3) months of opening the case.

Excellent: An actual service is documented in the case within the first three (3) months of the case being opened. A description of the service provided is detailed in either the text box of the actual service or a separate case note. The note outlines the actual service provided to the consume, and the consumers engagement level during the service. Details regarding the outcome or next steps for the consumer are indicated and it is evident that the counselor or employment staff utilized the spirit of MI in the delivery of the service.

Department of Disabilities, Aging and Independent Living Division of Vocational Rehabilitation

Example: “I met with Brooke, Sarah R, his case manager, and Sarah L, his BI, today to help B fill out a job application to Jockey Hollow at the South Barre Maplewoods. The position is for food prep and stock clerk. We also updated his resume and created a gmail account. B was engaged during our meeting today and only needed a little redirecting. We had been working on resume prep activities during our last meeting, so he was prepared to jump right into entering data today. B mentioned that he often has a hard time remembering his username and password for email accounts. We strategized a place that he can keep this information in his school folder and he also agreed to have me document it in his case.

B's log in information is as follows...

Username: bro*****@gmail.com

Password: *****

Sarah L (new support staff at school) knows the owner of the store and called him to see when a good time to drop off the resume might be. He said today and appeared to offer a job interview.

Next time we will either start the Walmart application or practice job interviewing skills depending on which is high priority for B.”

3. Is the work of internal and external partners well documented in the case narrative?

Unsatisfactory: There is evidence in the case that the consumer is working with other internal or external partners but no other supporting documentation has been provided (i.e.. No case notes or releases for providers).

Satisfactory: If the consumer is working with any internal or external partners, case notes document the collaboration as it applies to the case. Releases for each partner agency have been signed and are attached to the case.

Excellent: If the consumer is working with any internal or external partners, the case includes documentation that outline their work with the consumer and how it will impact the consumer’s progress towards their identified goals. These case notes include the name of the person that is the main point of contact for the consumer and signed releases for each agency are attached to the case.

Example: “Calista and I met today to discuss the resume development group, run by the YES, that she participated in last week. C reports that she found the group very helpful and has started to fill out

Department of Disabilities, Aging and Independent Living Division of Vocational Rehabilitation

the resume template that they were given at the end of the group. C stated that hearing that other students are in the same place she is regarding the job search process was very reassuring. At our last meeting, C had mentioned that she and her mom had an appointment scheduled to meet with the intake coordinator at the local designated agency. C stated that during the meeting, C and her mom agreed that they could benefit from some case management support. C and this counselor filled out a release for her new case manager, and the designated agency, and discussed why it would be helpful for this counselor to stay in touch with the new case manager as we continue to work towards C's employment goals. C said she understood and would bring the release home for her mother to sign."

4. Is the information gained through progressive employment and progressive education activities documented in case notes by VR and/or VABIR staff?

Unsatisfactory: There is evidence that the consumer participated in either a supported employment or progressive education activity but no supporting documentation is included in the case to give context or details regarding the type of activity and outcome.

Satisfactory: Progressive employment and progressive education activities are documented in case notes by either the VR or VABIR staff. Notes give information regarding the type of activity that was performed, where, when, and the results. These progressive employment activities are documented as an "Actual Service"; progressive Education activities should be recorded in an Educational Goal.

Excellent: Progressive employment and progressive education activities are documented in case notes either by the VR or VABIR staff that worked with the consumer during the activity. Notes give information about the type of activity that was performed and how it pertains to the potential employment goals. Information regarding the time, place and outcome of the activity are stated. For a progressive employment activity, feedback from the employer or partner was obtained and is also documented within the case. These progressive employment activities are documented as an "Actual Service"; Progressive Education activities should be recorded in an Educational Goal.

Example: "Ryan met with D (Shaw's Personnel Coordinator) Amber (weekday cleaner) and myself. R came prepared with the list of questions we brainstormed. The info interview went well and Ryan is interested in applying for the cleaning assistant position. D suggested that he goes through the normal application/hiring process. After that she'd like to schedule times for him to shadow with Amber. His work schedule can be flexible and there is an opportunity for him to start with a few hours at time and then increase when he feels comfortable. R may benefit from support with memorizing his social security number, locating I-9 documents and learning about direct deposit. Ryan has his learner's permit and drove himself home with his mom as a passenger."