

American Indian Vocational Rehabilitation Training and Technical Assistance Center

Case File Examples

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1. Application

IV. WORK/VOCATONAL HISTORY & EXPERIENCES:

<u>Date of empl.</u>	<u>Name of employer</u>	<u>Occupation</u>	<u>Reason for leaving</u>
10/1/15	Knight Ranch	Hand	Seasonal
9/13 - 10/15	Trading Post	Stocker	Caught sleeping
2/11 - 8/12	Depot	Cashier	Yelled at customer

Military service: Yes No Branch: _____ Dates: _____
 Service Number: _____ Type of Discharge: _____
 Current Work Status:
 Full Time Part Time Self Employed

V. INCOME INFORMATION:

		Amount Receiving	Applied	Denied	Terminated
• Social Security Disability Benefits	<input type="checkbox"/>	\$	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
• Supplement Security Income	<input checked="" type="checkbox"/>	\$	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
• General assistance	<input type="checkbox"/>	\$	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
• Temporary Assistance to Needy Families	<input type="checkbox"/>	\$	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
• Veteran's Benefits	<input type="checkbox"/>	\$	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
• Workman's Compensation	<input type="checkbox"/>	\$	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
• Unemployment Benefits	<input type="checkbox"/>	\$	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

I wish to apply for vocational rehabilitation. I understand the explanation of services, Client Assistance Program (CAP), participant rights, informed choice, and that the All Tribe VR Program will maintain CONFIDENTIALITY of all pertinent information obtained during the vocational rehabilitation eligibility process. I agree to the use of such information only for purposes directly connected with the administration of the VR project.

Participant Signature or Thumbprint

Date of Application

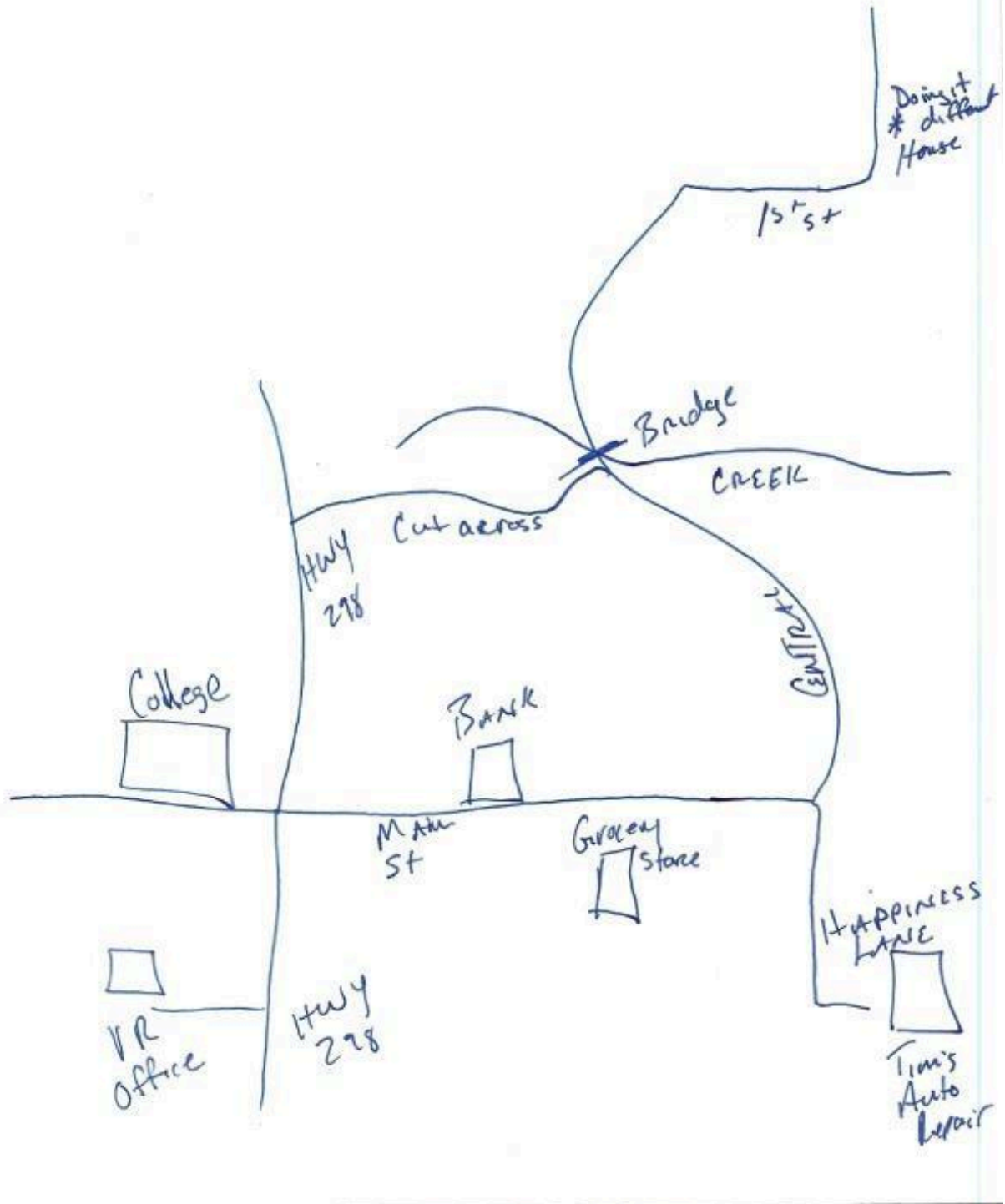
Participant's Representative (if applicable)

Date

Vocational Rehabilitation Counselor

Date

Residency Map



Rights and Responsibilities

AIVRS Participant Responsibilities

You attest that the information you have provided is true and correct to the best of your knowledge. You will notify your ALL TRIBE VR counselor within thirty (30) days of any changes in your living arrangements, address, income, transportation options, or other resources. You understand this will prompt a review of your case to determine continued services as required to gain employment. You understand that if you give false information your case services could be interrupted, up to and including termination of the case. You understand that your full participation is expected throughout the case, generally through informed choice and consideration of comparable benefits.

AIVRS Participant Rights

You may elect to have a representative help you throughout your participation in vocational rehabilitation. You will be given every opportunity to fully participate throughout the VR process, including exercising informed choice, making decisions during Individual Plan for Employment development, and using support services to help you make informed choices. You can expect your eligibility determination to be completed within sixty (60) days of application, an Individual Plan for Employment to be developed within ninety (90) days, and case reviews to be completed annually. You have the right to appeal any decision made by your VR counselor. The appeals process is explained in the attached form. During the grievance process you will have access to the following: an administrative review, an impartial hearing review, and the Client Assistance Program. To initiate the appeal process you need to consult with your VR counselor; if not satisfied you can submit, in writing, a request for the project director to review the decision. If you are not satisfied with the decision of the project director, you can request that the director of Social Services review the decision.

YOUR APPEAL RIGHTS

Decisions made by a vocational rehabilitation counselor or project may be appealed.

The Client Assistance Program (CAP) at Disability Rights [STATE] can provide you with information, advocacy, and assistance in appealing a decision.

Client Assistance Program

[STREET ADDRESS]

[CITY, STATE, ZIP]

Toll Free: [NUMBER] (Voice/TTY)

[LOCAL NUMBER] (Voice/TTY)

Fax: [NUMBER]

[EMAIL]

You may request “conciliation” (a review of the decision and discussion with a supervisor or a counselor). To exercise this option, please contact your counselor or project director [NAME AND CONTACT INFORMATION].

If you are dissatisfied with the program decision, you may appeal the decision in writing to: Director of Social Services [CONTACT INFORMATION] within 45 days of the date you are notified of the decision.

2. Certification of Eligibility

STATEMENT OF ELIGIBILITY/INELIGIBILITY

Jon
First Name

Ima
Middle

Doingitdifferent
Last Name

DJ020216
Case No.

10/22/19
Eligibility Date

Wayne
VR Counselor

You have been determined eligible for VR services based on the following information:

A. You are an enrolled member of a federally recognized tribe: NORTHERN CHEYENNE
Enrollment #: 343212343

B. You reside: on or within 25 miles of reservation border. Specify residence:
101 Nowhere St, Anytown, MT - see map in file.

C. There exists a medically recognized physical or mental impairment(s) (check one) Yes No

DISABILITIES and/or DIAGNOSES

PRIMARY	(L) orthopedic impairment
SECONDARY	Mood Disorder, NOS
OTHER	

D. Your impairment constitutes a substantial impediment to employment. Explain:
Because of (L) leg shortness, Mood Disorder, NOS (disability), Jon (participant name) experiences altered gait, chronic leg, back, and joint pain, and decreased coping skills (functional limitations), which cause(s) an impediment to employment, preventing the individual from performing the functions of a cashier (specific job duty).

E. VR services are required to achieve an employment outcome Yes No
Jon (participant name) requires C&G, vocational exploration and guidance, and continued psychological assessment and treatment (services) to prepare for, obtain, and keep a job that is compatible with his (his/her) unique strengths, resources, priorities, concerns, abilities, capabilities, interests, and informed choice.

CERTIFICATION OF ELIGIBILITY/INELIGIBILITY

Complete and check applicable boxes below:

Eligible for VR services

Not Eligible for VR services

***Significantly Impaired:**

Yes No

Vocational Rehabilitation Counselor

Date

NOTIFICATION OF ELIGIBILITY

October 22, 2019

Jon Doingitdifferent
101 Nowhere St.
Anytown, MT 59101

Dear Jon,

I have determined that you are eligible for vocational rehabilitation services.

The next step is working together to develop a work goal and decide what services and supports are needed to help you find and maintain employment. Please review the enclosed copy of the Rehabilitation Plan Form. It discusses plan writing and approval, participant responsibilities, and the appeal process. We have 90 days to develop and write the plan together, and your participation is necessary for us to succeed.

I have scheduled an appointment to discuss vocational rehabilitation services with you on:

November 5, 2019 at 2pm

It is very important that you attend this appointment. My schedule is booked out for several weeks, and rescheduling can be difficult.

If this time does not work, please call the administrative assistant at 406-345-0984 as soon as possible to reschedule. I look forward to our next meeting.

Sincerely,

Rehabilitation Counselor

cc: consumer file

3. Individualized Plan for Employment

ALL TRIBE VOCATIONAL REHABILITATION PROGRAM INDIVIDUALIZED PLAN FOR EMPLOYMENT

Name: Jon Doingitbetter
Case Number: DJ020216

Birthdate: 4/12/67
Counselor: Wayne

IPE No 1:

Employment Goal: Mechanic Helper

IPE End Date: 5/31/20

<u>VR Service</u>	<u>Provider</u>	<u>Responsible Party</u>	<u>Start/End Date</u>	<u>Cost</u>
C & G	ALL TRIBE VR	ALL TRIBE VR	11/20/19 5/31/20	0
Tools & Supplies	Napa	ALL TRIBE VR	11/25/19 12/31/19	\$650
Coveralls & work shirts	Northern Equipment	ALL TRIBE VR	11/25/19 12/31/19	\$200
OJS	ALL TRIBE VR	ALL TRIBE VR	11/20/19 5/31/20	0

Criteria for Measuring Progress Toward Employment:

Jon will maintain employment.
Jon will show up to work on time.
Jon will work his shift as required by his supervisor.

Responsibilities of ALL TRIBE VR:

ALL TRIBE VR will assist with purchasing tools and supplies.
ALL TRIBE VR will be available for appointments in person and by phone.
ALL TRIBE VR's employment specialist will provide on-the-job supports (OJS).

Responsibilities of the participant:

Jon will show up to work on time.
Jon will work to his supervisor's expectations and satisfaction.

Responsibilities of other entities/comparable benefits:

NA

Are personal assistance services needed at this time? Yes No
Are assistive technology services needed at this time? Yes No
Are post-employment services needed? Yes No

Supported Employment

Are extended services needed? Yes No
Sources for extended services:

Dates for review of this plan:

Participant Comments:

- I have been provided with options for assistance in designing this employment plan.
- I have been given contact information on how to seek assistance to resolve any disputes that I have regarding this plan.
- I have made the choices I wanted in selecting the employment goal, the VR services, the service providers, and the methods used to obtain the services.
- The VR counselor and I will review the plan on the dates listed above. I have my own copy of this plan for reference.

Participant Signature

Date

Counselor Signature

Date

Director Signature _____

Date _____

Goal Rationale

1. **Goal:** Mechanic Helper
2. **Participant Perspective/Voice:** “I really like this type of work. The experience I had in the job shadow was great and I found that I have most of the skills required.”
3. **Employment Outlook (use direct quotes from ONET):**
Montana State Trends for Automotive Service Technicians and Mechanics
Employment (2018): 3,460 employees
Projected Employment (2028): 3,570 employees
Projected Growth (2018-2028): 3%
Projected Annual Job Openings (2018-2028): 350
4. **Goal Compatibility:** This is a good goal for Jon to pursue. His relationship with the owner is positive and not impacted by his history of drug and alcohol dependency. The work environment supports his physical disabilities, and he has accommodations in place with the owner.
5. **Service Rationale:** Jon requires tools to work in this position. The purchase of tools will allow him to work. Jon does not have any coveralls or work shirts; the purchase of the coveralls and work shirts will meet the requirements of the work site. The employment specialist will work with Jon to provide him with training on the jobsite as required. She will complete site visits to ensure he is working to his supervisor's expectations and satisfaction.

Statement of Service Responsibility

Because my substance use or abuse has resulted in impediments to employment, I understand that I must comply with the following conditions to benefit from vocational rehabilitation services:

1. Demonstrate the ability, throughout the course of VR services, to meet the standards of abstinence and sobriety required by my vocational goal's employment setting.
2. Comply with recommendations from other professionals regarding the treatment of my substance use or abuse. I may be asked to provide verification of compliance with my treatment plan (up to and including a UA) by my VR counselor.
3. Participate in some activity that provides support for abstinence (i.e., self-help groups, church, sweats, spiritual development/maintenance, counseling, treatment, aftercare). My VR counselor may ask me to provide confirmation of my participation, such as attendance sheets; letters from family, friends, counselors, and religious leaders; agency or organization reports; and other relevant documents.
4. If applicable, perform and abide by all court-ordered requirements. My VR counselor may request verification from a parole/probation officer or court representative.
5. Participate in periodic reviews with my VR counselor to assess the continued benefit of supports and vocational activity.
6. Take responsibility to ensure that the relevant professional's verification of these conditions is provided in a timely manner, as arranged with my VR counselor.

Should I not meet the conditions stated above, I understand that services may be suspended. Delivery of further services will be contingent upon my meeting the standard required by my employment goal.

PARTICIPANT SIGNATURE: _____

DATE: _____

Traditional Healing IPE Amendment

ALL TRIBE

John DoingItDifferent
Participant Name

Vocational Rehabilitation

DJ020216
Client #

Dates	Sup. Initial	Summary of Purpose for Amendment	Total Cost
12/27/19	WD	<p>AMENDMENT #1 <i>Traditional Healing Ceremony: tobacco \$30; prayer clothes \$45; 3 bundles of wood \$50; and food basket w/blanket \$250.</i></p> <p>Participant Signature:</p> <p>Total Cost of Amendment: \$375.00</p>	<p align="right"><i>(Amend \$)</i> \$375.00 <i>(Decommit \$)</i></p>

Post-Employment Services IPE Amendment

John DoingItDifferent
Participant Name

Vocational Rehabilitation

DJ020216
Client #

Dates	Sup. Initial	Summary of Purpose for Amendment	Total Cost
6/15/20	WD	<p>AMENDMENT #1 <i>Training for tire repair certification - \$1400.00; fuel/mileage - \$300.00; and lodging - \$450.00. These post-employment services are valid for 30 days from the signature date. At the end of 30 days, I will review the progress of the participant and determine if these services assisted Jon in advancing his employment.</i></p> <p>Participant Signature:</p> <p>Total Cost of Amendment: \$2,150.00</p>	<p align="right"><i>(Amend \$)</i> \$2,150.00 <i>(Decommit \$)</i></p>

4. Case Notes

Case Note Examples

Initial Case Note Memo

Participant Name: Jon Ima Doingitdifferent
Counselor: Wayne DageI

Case Number: DJ020216
Date: 8/27/19

Reason for Referral:

To get assistance in finding a job.

Reported Disability/Impediment to Employment:

(L) leg shorter – secondary to motor vehicle injury; mood disorder – unspecified; and alcohol/chemical dependency

Work, Education, and Medical Considerations:

Jon reports that he has worked locally for the last several years in several different positions. He has work experience as a cashier, grocery stocker, and ranch hand. He completed high school but did not pursue any post-secondary training. While working as a ranch hand, Jon worked with a master mechanic repairing ranch equipment. He informed me that he broke several bones when he was younger but does not have any medical issues that would impede employment.

Expressed Interests, Abilities, & Preferences:

Jon stated he would like to find a trade to finish out his career journey. He said there is a high demand for welders and metal fabricators in this area. Jon would also be willing to pursue a position as a mechanic helper.

Counselor Observations & Plan of Action

Jon appeared to be nervous during our session, continually shifting in his chair, getting up and pacing in the room, and rocking in his chair. When asked about it, Jon stated that he has never done well in appointments like this. When asked to explain, he stated that he felt like he was always judged on his past behavior and choices. Jon went on to state that he always used alcohol and drugs to manage his mood disorder. When asked about this, he stated that he was not diagnosed with his mood disorder until treatment. I explained to Jon that I am not there to judge him, but to help him obtain employment. I informed Jon that we may have to explore his past in order to remove barriers to employment, but it was not a primary focus. After this exchange, Jon appeared to calm down and was able to remain focused and on task throughout the remainder of the session.

Jon had no issues with filling out the ROIs and understood the disclosure statements. Next steps will be gathering medical documentation, reviewing to determine eligibility, and scheduling the next appointment after eligibility.

Case Note

Participant Name: Jon Ima Doingitbetter
Counselor: Wayne

Case Number: DJ020216
Date: 11/5/19

I met with Jon in the office today. We discussed his desire to obtain some sort of certification to prepare him for a career that would see him through to retirement. When asked what he wanted to pursue, Jon informed me that he is interested in welding and becoming a mechanic helper. According to Jon, both are in high demand in this area. I asked Jon what experience he has in these fields. Jon informed me that he has worked as a ranch hand for most of his life, which requires him to have a basic understanding of mechanics and welding. He does not have any certifications or post-secondary training.

I informed Jon that he would need to do some research on available jobs in the area and training opportunities, and look at the feasibility of obtaining employment on and off the reservation. I have scheduled a follow-up appointment for 11/12/19 at 2pm to discuss his findings.

WD

Case Note

Participant Name: Jon Ima Doingitbetter
Counselor: Wayne

Case Number: DJ020216
Date: 11/12/19

I met with Jon in the VR office to discuss his research. Jon has found that the local need for welders is decreasing, but the need for mechanic helpers is growing. There is one mechanic shop in Anytown that is serving the entire community. There is currently a 2-3 week waiting list for repairs.

Jon has found that there are not any training opportunities for a mechanic helper. The only training available is from local colleges that offer an automotive tech curriculum. Jon stated that he doesn't want to pursue a college degree at this time. I brought up the idea of job shadowing a mechanic to find out what level of skill the position needs. This would allow him the opportunity to find out if his skills are sufficient.

Jon agreed and I will contact the employer to set up the job shadow. The next appt will be after Jon completes the job shadow.

11/12/19 4:45 pm

I spoke with Tim from the auto repair shop and he has agreed to the job shadow. I contacted Jon and informed him that his job shadow would start on 11/16/19 and last until 11/19/19. We will meet on 11/20/19 to discuss the results. I spoke with the employment specialist to begin the referral process for supports to obtain and maintain employment.

Case Note

Participant Name: Jon Ima Doingitbetter
Counselor: Wayne

Case Number: DJ020216
Date: 11/20/19

I met with Jon in the office to discuss the job shadow. Jon informed me that he enjoyed the job shadow and found it very interesting. I asked him what he learned about his own skill set. Jon said he found he has most of the required skills and knowledge needed to do this job. I asked Jon what he wants to do through VR. Jon informed me that he wants to try to find employment as a mechanic helper.

We reviewed the notes from Tim, the mechanic he shadowed, together. Tim stated Jon is a quick learner and was able to step into the flow of work easily. Jon appeared surprised by the positive report. When we discussed the options through VR, Jon decided that he would like assistance from the employment specialist to obtain this position, and to brush up on the job's duties and supports for maintaining the position. I agreed with the employment choice and the work goal. We developed the IPE on this date. Jon signed and dated the IPE.

I will complete the internal referral to the employment specialist. The employment specialist will begin to work with Jon after completing the intake process. Jon's next VR appointment will take place with the employment specialist.

WD

Case Note

Participant Name: Jon Ima Doingitbetter
Counselor: Wayne

Case Number: DJ020216
Date: 11/28/19

Jon informed me that he has started working for Tim's Repair. The tools are sufficient at this time. I reminded him to stay in touch with me and informed him that he would have support from Jamie [employment specialist] during the early stages of his employment.

I encouraged Jon to keep an open mind during the training period and to request any additional tools he may need.

Next steps are to participate in the initial training, show up to work on time, and meet the supervisor's expectations.

WD

Case Note

Participant Name: Jon Ima Doingitbetter
Counselor: Wayne

Case Number: DJ020216
Date: 12/5/19

Jon attended his appointment today with Jamie, his employment specialist. Initially, Jon appeared very nervous about the meeting. However, after discussing his attendance record and the wonderful report that Jamie has provided me, he appeared to relax and become more comfortable with the meeting.

During the meeting we discussed the compensatory strategies that Jamie has developed and how to apply them in his work setting. Jon described his struggle remembering job tasks. He said this was the result of his traumatic brain injury and "the general rugged lifestyle of a cowboy rattling the bucket."

As the meeting progressed, I began to notice Jon fidgeting in his chair, rubbing his hands together, and making facial expressions suggesting discomfort. I asked Jon what was happening with his emotional or mental state at that moment. Jon said he is anxious about going back to work next week because he doesn't feel able to "give Tim his money's worth." I asked him to explain what made him feel that he wasn't giving Tim his best effort. Jon said he is so fatigued at the end of the day that he tends to forget everything that he's supposed to do for Tim. He said he didn't feel he was working at a satisfactory level, that he was below his own standards. Jamie reminded Jon of the report Tim gave on Jon's capabilities.

Taking into account Jon's self-assessment, I counseled him about the impact of his disability on his employment and work stamina. I explained that when an individual experiences traumatic injury and/or extensive alcohol or drug use, there's an impact on cognition and the brain's flexibility. I explained inflexibility is what he's experiencing through fatigue and loss of memory. I further explained that when an individual experiences a disability and does not work for an extended period of time, their stamina decreases rapidly. That is why I recommended a part-time position to start with, eventually working toward a full-time position. We want to help him develop his stamina before jumping into a full 40-hour-a-week job.

Jon agreed and accepted the feedback. By the end of the meeting Jon appeared to fully understand the impact of his disability on his ability to work.

WD

Case Note

Participant Name: Jon Ima Doingitbetter
Counselor: Wayne

Case Number: DJ020216
Date: 12/17/19

Jon arrived for his appointment today dressed appropriately and with good personal hygiene. He let me know he is enjoying his employment and likes the relationship he is developing with Tim. When asked about the job duties and his stamina, Jon said he is doing great now. He was sore and fatigued for the first couple of weeks; however, now he is not experiencing any pain or fatigue. He said when he works within the regular job duties, such as taking inventory of supplies and cleaning/organizing tools from the work bay, he doesn't feel any pain; when he works outside of the regular job duties, for instance unloading batteries from the delivery truck, he experiences soreness and pain. The pain and soreness are caused by the uneven length of his lower extremities.

Jon says the employment specialist helped him learn his duties and was a great help. He likes that support is there when he needs it. He says everything is going well, and he doesn't feel insecure about keeping the job at this time.

Next steps: job checks, support as needed, and continued meetings with VRC.

WD

Case Note

Participant Name: Jon Ima Doingitdifferent
Counselor: Wayne

Case Number: DJ020216
Date: 12/27/19

Jon stopped by, and since I had a free appointment slot we met. Jon stated he was struggling with his emotions and didn't want to lose this job. When asked to explain, Jon explained that he is getting emotional over the slightest comment or statement from people in his life. He gave an example of an argument he got into with his friend over how to barbecue hamburgers. I asked what Jon thought he needed as far as support. He informed me that he would like to speak with a local healer on this issue and go through a ceremony. I asked him what he has done to manage this to date. Jon informed me that he is currently maintaining his med management routine from the behavioral health clinic, getting enough sleep, and praying at home.

We discussed the necessary steps to completing traditional healing. Jon informed me that he has sought out the healer, and he now must give tobacco, prepare prayer cloths, gather wood, and provide a food box as payment. I agreed that these are the appropriate steps to securing the traditional healing. I informed Jon that we would need to amend the plan to include traditional healing.

Next steps: Give tobacco, complete ceremony, and provide receipts of items purchased.
WD

Case Note

Participant Name: Jon Ima Doingitbetter
Counselor: Wayne

Case Number: DJ020216
Date: 1/4/20

After hearing from Jamie about the great job Jon is doing at the shop and that Tim is completely satisfied with his work, I have moved Jon's case status to "employed." I will follow his case for an additional 90 days to ensure that it's a good fit, and that Jon's employment remains stable. At the end of 90 days, I will close this case as "successfully employed."

I contacted Jon by phone this afternoon and informed him that I was changing his case status to employed and that I would support him for an additional 90 days. I explained that if anything needed for his employment came up during this time frame, he could contact me to ensure that he remains stable in his job. Jon thanked me for all the effort that we've put into helping him get on his feet. Jon assured me that he would contact me with any other needs.

Next steps: maintain contact with John for the next 90 days, ensure stability for employment, and close the case at the end of 90 days.

WD

Case Note

Participant Name: Jon Ima Doingitbetter
Counselor: Wayne

Case Number: DJ020216
Date: 1/20/20

Jon came into the office today dressed appropriately and appeared to be in a very good mood. He reported that everything is going great at the shop and that he enjoys working with Tim. We discussed his responsibilities there, and Jon reported gaining more responsibility within the last month. He is now doing oil changes and small repairs on vehicles, on top of his regular duties opening the shop, completing inventory, and cleaning up and putting away tools.

I asked if there are any supplies or tools that he needs at this time, and Jon said he is doing fine with what he has now. He said that at this time he has no need for assistance and really appreciates everything we've done for him.

Next steps: complete periodic review in 30 days to ensure employment stability and prepare for closure.

WD

Case Note

Participant Name: Jon Ima Doingitbetter
Counselor: Wayne

Case Number: DJ020216
Date: 2/18/20

I spoke with Jon on the phone, and he informed me that the job is going great. He enjoys having all the responsibility, but the biggest impact is that he feels more positively about himself. He says he can help out with the bills, buy groceries, and buy new shoes for his nephew this month. He appears to be very proud of his accomplishments.

I began discussing closure of his case as a way to prepare Jon. I explained the process and asked him to think about any questions he may have.

Next steps: complete the periodic review in 30 days to ensure employment stability and prepare for closure.

WD

Case Note

Participant Name: Jon Ima Doingitbetter
Counselor: Wayne

Case Number: DJ020216
Date: 3/16/20

I spoke with Jamie this morning about increasing work hours for Jon. I agree that Jon is ready for this transition. I am concerned that Jon may become fatigued and overwhelmed, and recommended that Jamie be there for support doing the first week. Jamie stated she would be onsite to support Jon.

I called Jon in the late afternoon. He is very excited to increase his work hours. He says he will let me know if he requires any further assistance. He also agrees that Jamie's assistance will be needed during the first week.

I called Tim and explained our process with Jon. Tim understands and supports the transition. Tim is also aware of the closure process.

Next steps: complete periodic review in 30 days to ensure employment stability and prepare for closure.

WD

Case Note

Participant Name: Jon Ima Doingitbetter
Counselor: Wayne

Case Number: DJ020216
Date: 3/24/20

I called Jon today. He informed me that he has completed his first 40-hour week and is feeling really good. He says his pain and soreness have not been an issue and, surprisingly, he feels better than when he was not working. We discussed tapering off Jamie's support time, like when she had reduced services with him in the past. Jon said he understood and would let us know if he needed any additional support.

Next steps: complete periodic review in 30 days to ensure employment stability and prepare for closure.

WD

Case Note

Participant Name: Jon Ima Doingitbetter
Counselor: Wayne

Case Number: DJ020216
Date: 4/3/20

I asked Tim about Jon's work performance. He reports Jon has been doing a great job and has maintained his 40-hour weekly schedule without an issue. He went on to explain that Jon has taken over the responsibility of opening the shop, completing inventory, ordering inventory, and cleaning up the bay at the end of the day.

Additionally, Jon has increased the number of repair jobs he participates in each week. Tim says the shop has increased its revenue because they are turning around jobs more quickly. I thanked Tim for giving Jon this opportunity and reminded him that VR would remain available for support after case closure.

I spoke with Jon and informed him we are closing his case. Jon says he appreciates the supports provided, but he is ready to "leave VR in the dust!" I provided him with his Rights and Due Process form and information about post-employment services availability, and collected the information needed for closure.

Employment info:

Tim's Auto Repair
40 hrs/wk at \$15.00/hr
1010 Happiness Lane
Anytown, MT 59101

Next steps: Send out a closure letter to Jon.

WD

5. Training and Job Seeking

Employment Specialist Case Notes

Case Note

Participant Name: Jon Ima Doingitdifferent
Employment Specialist: Jamie

Case Number: DJ020216
Date: 11/27/19-11/29/19

11/27/19

Jon showed up on time and ready to work. He appeared excited to start the job. I observed the interactions between Tim and Jon. Jon appears eager to complete the job as assigned. I was able to discuss the job duties with Tim. Afterwards I began to provide training on opening the shop and getting equipment prepared for the day. Next, we discussed and established a routine for cleaning and prepping the work benches. Jon shows great learning capacity. This process lasted until lunch. After lunch, we began cleanup of the service bay, including putting tools away. Tim showed Jon and me the storage area and how to complete inventory of supplies. Jon is easily intimidated by paperwork, including the inventory sheets. However, once assistance is provided Jon is quick to pick up on the required duties. At the end of the workday, Jon was visibly tired. When asked how he was doing, he responded that he is fatigued due to the level of "brain work" he did today. I explained that this is completely normal during the initial training period.

11/28/19

Jon showed up on time and appeared ready to work. He initiated the opening of the shop and prepared for the day. Jon was prompted to clean up benches and get tools put away. Jon asked Tim if he can switch the inventory/restocking with bench and tool clean up times. Tim stated he could and that it would make more sense because then the shop would be ready right away in the morning. Jon appeared very happy with himself. I used this as "learning moment" encouraging Jon to recognize his ability to already help Tim. Again, Jon stated he was completely exhausted after today.

11/29/19

Jon showed up on time and implemented the new process of starting with restocking/inventory. Then he moved on to cleaning the service bay. Tim asked him for assistance in completing a repair on the vehicle. Jon was able to provide appropriate support to Tim and the job was completed. Since today is the last day on Jon's schedule, we completed a timesheet and reviewed all the required paperwork. Jon continues to struggle with the paperwork aspect; however, once he understands can easily complete the tasks.

JF

CC Wayne Dagele VRC

Case Note

Participant Name: Jon Ima Doingitdifferent
Employment Specialist: Jamie

Case Number: DJ020216
Date: 12/2/19-12/4/19

12/2/19

Jon showed up on time and ready to work. Jon appeared to struggle with the opening of the shop. When asked about his struggles, Jon stated he is having a difficult time remembering the steps in the process of opening the shop. We discussed the idea of a compensatory strategy, such as creating a checklist. He continued the rest of the morning working to Tim's expectations, but appeared to be struggling with his confidence to continue work.

12/3/19

Jon showed up on time and appeared ready to work; however, was very tentative in his approach to the opening of the shop process and completing the inventory. When asked about his struggles this morning, Jon stated that he is uncertain of his ability to complete the job. I spoke with Tim and asked for a break that would allow us to go over the compensatory strategies I developed last night. Tim agreed that this would be a good idea. After going over the checklist, Jon stated that he felt more confident in his ability to complete the tasks at hand. The afternoon went smoothly with Jon completing all clean up and putting the tools away as trained.

12/4/19

Jon showed up on time and brought his checklist with him today, which turned out to be a great tool for him to use. Jon was able to open the shop and complete all the steps as noted on the checklist with minimal prompting. He then went on to complete the inventory with one prompt and that was simply on the reading of the SCU code. Again, today Tim requested his assistance on completing a repair. Jon stated when they were done that this is his favorite activity in the shop. I spoke with Tim about this statement and Tim agreed that Jon has great mechanical aptitude and skills, and he is willing to consider providing him with more hands-on repair work. We discussed the meeting with Wayne tomorrow. Jon initially stated he was nervous to meet with Wayne and me, however I explained to John that this is simply an update on progress in the work site. This appeared to help Jon relax.

JF

CC Wayne Dagele VRC

Case Note

Participant Name: Jon Ima Doingitdifferent
Employment Specialist: Jamie

Case Number: DJ020216
Date: 12/8 & 12/10/19

12/8/19

Jon showed up on time and ready to work. He initiated the opening process for the shop with no issues and no prompts. Jon then completed the inventory and prepared the bay for the next repair job. I spoke with Jon today about stepping back on the job training. He appeared to be somewhat uncomfortable with this idea, but was able to accept that he is doing a good job. I informed Jon that I would not see him tomorrow, and I will be with him again on the 10th.

12/10/19

Jon showed up on time and was ready to work. He opened the shop and initiated the inventory without being prompted. While Jon was preparing the bay for the next repair job I spoke with Tim. Tim reported that yesterday Jon showed up on time, opened the shop with no issue, and was able to function throughout the day with minimal prompting from him. I informed him that I would remain involved in the job training, but I would be stepping back in my time on-site. Tim stated that he felt this would be appropriate and that Jon is ready for this responsibility. I spoke with Jon about the changes in the work schedule and he was able to accept this feedback appropriately. Jon appeared proud of himself when I informed him of the praise that Tim had provided him.

JF

CC Wayne Dagele VRC

Case Note

Participant Name: Jon Ima Doingitdifferent
Employment Specialist: Jamie

Case Number: DJ020216
Date: 12/14 & 12/16/19

12/14/19

Jon showed up to work on time, opened the shop, and initiated the inventories without being prompted. Jon started his day in the shop and began working on a repair that Tim and he had worked on the day before. Jon then transitioned into another work activity without being prompted or instructed. After completing that work activity, he finished the day by cleaning the work area and putting all the tools away. I observed the activity throughout the day and spoke with Jon at the end of the day. I informed him that I would be in and out during the workday from now on as he no longer needed a full 8 hours of training. Jon seemed very hesitant but finally accepted that he's doing a great job by himself.

12/16/19

Jon showed up on time and opened the shop without any issues. Once he got the shop opened, I left and said I would return later this afternoon. As I was leaving, I spoke with Tim informing him that if anything happened, he could give me a call and I'd be available to provide support. I returned this afternoon at 2:30. Jon was working on a project and Tim said he was doing a great job. I returned at 4:30, and Jon was completing the shop clean up and putting the tools away with no issues.

JF

CC Wayne Dagele VRC

Case Note

Participant Name: Jon Ima Doingitdifferent
Employment Specialist: Jamie

Case Number: DJ020216
Date: 12/21 & 12/28/19

12/21/19

I stopped in to check on Jon and to speak with Tim to get a report on Jon's work. Jon stated that he's loving his job and that he hasn't had any problems, so long as he has the checklist with him. Tim supported this, stating that Jon has taken on more and more responsibility in the shop. After Jon returned to work in the shop Tim spoke to me about possibly increasing hours. I informed Tim that I would speak with Wayne and see what his opinion was and would return within the week to discuss the extended hours.

12/28/19

I returned to the shop and spoke with Tim about the increase in hours for Jon. I informed Tim after speaking with Wayne that at this point, he would like to see the hours stay the same because, historically, this is about the time that Jon typically blows out of his employment. Tim recognized that and supports my involvement in maintaining his employment. At this time, we will not increase hours we will continue to support Jon at his current level.

JF

CC Wayne Dagele VRC

Case Note

Participant Name: Jon Ima Doingitdifferent
Employment Specialist: Jamie

Case Number: DJ020216
Date: 1/3 & 1/11/20

1/3/20

I did a job check with Jon today. When I arrived, he was busy in the shop working with Tim on another repair. Both Jon and Tim say everything is going great; Jon has been able to complete all job duties as assigned. Tim said he is working to his satisfaction and level of expectation. Jon stated that he enjoys his employment and is no longer feeling extreme fatigue or pain with the assigned job duties. I informed Jon that I would report this to Wayne and that his status could be changed to "employed." I explained that this means for the next 90 days I would be doing job checks and be available to support Jon. At the end of those 90 days, if Jon were stable in his employment, VR would be closing his case and I would no longer provide employment supports because he had learned everything required for the position. Tim and Jon said that sounds like a great plan.

1/11/20

I spoke with Jon today, and he informed me that everything is going well at work. He has not had any problems and he has not missed any work since our last meeting. Tim stated that Jon is doing a great job, and he is very satisfied with his work abilities. I reminded both of them that if they needed anything to give me a call.

JF

CC Wayne Dagele VRC

Case Note

Participant Name: Jon Ima Doingitdifferent
Employment Specialist: Jamie

Case Number: DJ020216
Date: 1/25 & 1/31/20

1/25/20

I spoke with Tim, and he informed me that Jon has been doing a great job in the shop. Not only is he opening the shop, completing inventory, and cleaning up the bay, he has now taken on the responsibility of ordering supplies. Jon says he is enjoying the added responsibility and that physically he is doing well and is no longer experiencing pain or soreness. I informed both Jon and Tim that I would stop by later in the month. However, if anything comes up they could give me a call.

1/31/20

I completed the job check today with Jon and Tim. No issues were reported at this time. Tim says that Jon is doing a great job. Jon stated he is enjoying the work and is starting to feel proud of himself.

JF

CC: Wayne Dagel, VRC

Case Note

Participant Name: Jon Ima Doingitdifferent
Employment Specialist: Jamie

Case Number: DJ020216
Date: 2/16 & 2/25/20

2/16/20

I completed a job check today with Jon. Tim was out of the shop clearing snowdrifts to open the road to his house. I asked Jon what he was working on today. He said Tim was having him complete a couple of vehicle repairs. I asked how he was handling this responsibility, and he said it was going great and that these were small items he knew how to complete. He said Tim has been showing him how to complete several different repairs recently. Jon appears very happy and to be enjoying the added responsibility.

2/25/20

I spoke with Tim today. He says Jon has been doing a great job in the shop. He has left Jon on several occasions for a couple of hours, and he always completes the assigned tasks. Tim also says Jon is a self-starter and has initiated several shop projects that will ultimately help with the workflow.

JF

CC: Wayne Dage, VRC

Case Note

Participant Name: Jon Ima Doingitdifferent
Employment Specialist: Jamie

Case Number: DJ020216
Date: 3/16 - 3/24/20

3/16/20

I checked in with Tim, and he reports that Jon is doing an amazing job. Jon also spoke with confidence about completing his job duties and responsibilities at the shop. I informed them that Wayne and I have discussed the proposed increase in hours for Jon's work week and that Wayne agrees and has authorized more hours for me to work with Jon in order to assist with this transition. Jon and Tim are happy with that plan, and Jon says he is ready to work more hours beginning this week. Tim agreed and is increasing Jon's hours as of today.

3/17/20

Jon showed up on time and completed all the steps to opening the shop. I spent the day observing Jon's work stamina. Jon was able to maintain his work pace as well as complete all duties. Tim stated he was impressed with Jon's improvement.

3/18/20

Jon did not show any signs of fatigue or pain today. He showed up on time and completed all his work duties. Today, Tim informed Jon that he will accept more work orders since Jon is working more hours. Jon will be assigned repair jobs based on his knowledge and skill. Jon says he loves the idea.

3/19/20

Jon is beginning to complete work orders as they come into the shop. I am currently assisting with prompting and organizational support; Tim is completing a final check on each repair before releasing the vehicle to the customer. So far, Jon has not had any problems or incomplete repair work. Jon says he is happy with this extended work schedule.

3/24/20

I stopped by the shop to complete a job check with Jon. Jon was busy in the bay completing a repair. Tim affirms Jon has been doing a great job, and the transition to working 40 hours a week has been smooth. I told Tim I would be conducting job checks periodically over the next couple of weeks. We would begin preparing Jon's case for closure in April.

JF

CC: Wayne Dage, VRC

Case Note

Participant Name: Jon Ima Doingitdifferent
Employment Specialist: Jamie

Case Number: DJ020216
Date: 4/2/20

4/2/20

I met with Jon and Tim to discuss the VR case closure process. I reviewed the job duties, the checklist, and the inventory list to ensure they were correct and updated. Jon said he appreciates my help and that he feels capable of continuing to work.

I notified Wayne of this last contact and sent over my final notes.

JF

CC: Wayne Dagel, VRC

ALL TRIBE VR PROGRAM INITIAL INTAKE ASSESSMENT

NAME: Jon Doingitdifferent

ASSIGNED CASE NUMBER: DJ020216

ADDRESS: 101 Nowhere St

CITY/STATE: Anytown, MT ZIP CODE: 59043

COUNTY: Lucky Duck County

MAILING ADDRESS (if different from above):

PHONE NUMBER: 406-740-0939

MSG PHONE:

EMAIL:

EMERGENCY CONTACT: Jackie Flyingrabbit

EMERGENCY PHONE NUMBER: 406-740-0940

VR COUNSELOR: Wayne

DISABILITY: (L) leg mobility issues, Mood Disorder NOS, alcohol and drug use/abuse.

IMPACT OF DISABILITY ON FINDING A JOB: Jon's history of drug and alcohol use/abuse, along with his mood disorder, means he faces many barriers to finding work within the community. Various potential employers have witnessed Jon's inappropriate reactions and responses as a result of his not following a medication treatment plan. Jon also experiences decreased mobility and limited stamina for standing.

MEDICATIONS: Depakote

ALLERGIES: None

MEDICAL CONDITIONS WE NEED TO BE AWARE OF: None

SENSITIVITIES (i.e., chemicals, sun, heat, etc.): None

LIMITATIONS (i.e., bending, reaching, etc.): Reduced stamina for standing, walks at a slower speed, and limited capacity for carrying/lifting weight.

EDUCATION: K-6 6-8 9-12

HS DIPLOMA/GED ASSOCIATES BACHELORS

OTHER

DO YOU: SMOKE CHEW DRINK USE ILLEGAL DRUGS

HOW OFTEN:

FINANCIAL INFORMATION:

CURRENT FINANCIAL SITUATION (i.e., can you pay your bills?, etc.): Struggling to make ends meet on SSI. Able to pay utilities; however, relies on friends and relatives to cover daily living expenses.

FINANCIAL GOAL: Wants to get to the point where he doesn't have to rely on friends and family. Wants to be able to afford gas to go into town.

CURRENT BENEFITS: SSI/SSDI TANF OPA/SNAP OTHER
EXPLAIN (i.e., SSI w/ payee, food stamps; include amounts): SSI \$721

LEGAL ISSUES: MISDEMEANOR FELONY PROBATION

EXPLAIN: "I was pulled over for DUI and had drugs in the vehicle with me. I have served my time, but it hangs over my head in the community."

VALID DRIVER'S LICENSE: YES NO CDL

ADEQUATE TRANSPORTATION? Pickup truck, older model, but mechanically sound.

WHAT IS YOUR WORK GOAL? Mechanic Helper

WHY? I like to perform the work. However, at my age, I don't want to spend the time to obtain a college degree. This work will pay a wage that would allow me to live comfortably.

WHAT ARE YOUR OTHER OPTIONS IF THIS WORK DOESN'T WORK OUT? I'm willing to look at other options within this field. I know the coal plants will hire helpers.

HOW MANY HOURS CAN YOU WORK IN A SHIFT? (Explain): Six at first but should be able to work up to 8.

WHICH DAYS ARE YOU AVAILABLE TO WORK AND HOW MANY DO YOU WANT TO WORK?: Any and all.

ARE YOU AVAILABLE FOR EVENINGS AND WEEKENDS? (Explain):
Yes

DO YOU WANT TO KEEP YOUR BENEFITS? (SSI, SSDI, SNAP, TANF etc., explain): Not if I can be successful. If I can't, then, yes, I want to keep my benefits.

DESCRIBE YOUR PERFECT BOSS: Someone who is willing to listen and work with me to support my success on my job.

DESCRIBE YOUR PERFECT WORK ENVIRONMENT (e.g., teamwork, work alone, etc.):
I'd like to work in a positive environment with clear leadership.

WHAT CAN YOU IMPROVE (OR SUSTAIN) TO HELP YOU OBTAIN AND HOLD A JOB? I need to be responsible for my appearance when meeting with potential employers. I need to stay on my medications and maintain my mental health.

LIST YOUR WORK INTERESTS: Mechanic helper, shop helper, welder.

LIST YOUR WORK SKILLS/STRENGTHS: Welding, general mechanics, ranch hand experience, some customer service, and farm/ranch equipment operation.

WORK PREFERENCES/ACCOMMODATIONS (i.e., locations, hours, etc.): I would like to work in the local community, not outside of 30 miles. I am willing to work up to 40 hours per week but need to start part-time.

HOBBIES: Roping, training horses, hunting, fishing, and working on vehicles.

POSSIBLE WORK GOALS: Shop helper, welder.

STAFF COMMENTS/OBSERVATIONS: Jon was eager to get started. Although he is intimidated by the paperwork, with assistance he is able to complete all questions. Jon was clean shaven, dressed appropriately, and appeared to have a stable mood.

Staff Signature

Date

Work History

Knight Ranch Guy Knight 406.740.4532	10/2015	General ranch hand, calving, fencing, haying, general mechanics, training horses	Seasonal
Anytown Trading Post MGR-Sally 406.342.4567	9/2013 - 10/2015	Stock shelves, face shelves, unload truck	Caught sleeping
Anytown Depot MGR-Frank 406.342.1278	2/2011 - 8/2012	Cashier, count tills, stock front shelves	Blew up at customer

ALL TRIBE VOCATIONAL REHABILITATION PROGRAM
Internal Referral Sheet

I. PERSONAL INFORMATION:

Date: 11/20/19

Name	Jon First	Ima MI	Doingitdifferent Last	DOB: 4/12/67
Address	101 Nowhere St (P.O. Box or Street)	Anytown (City)	MT (State)	59043 (Zip code)

Directions to home: Go past New Hope bridge and turn right onto Prosperity.

Telephone: 406-740-0939 Age: 48 Tribal Membership/CIB #: NC343212343

Counselor referring for services: Wayne

II. Disability(ies), Employment, and Specific Instructions:

Description of disability, limitations, and how they prevent individual from getting a job:
His left leg is shorter than his right leg, and he experiences chronic pain and an altered gait.
History of alcohol and chemical dependency (in early stage of recovery). Struggles with maintaining a positive mood in a work setting.

Description of employment participant is interested in:
Mechanic Helper

Description of transferable skills participant brings to new employment:
Jon has worked as a ranch hand for most of his life. He has a basic knowledge of mechanics and an aptitude for the work.

Specific instructions/requests/circumstances:
Jon has a job with Tim's Repair and will begin work when he gets his tools on 11/25/19. Please attend his first day and provide him with training on an as-needed basis. Site visits will be required until case closure.

ALL TRIBE VRP JOB PLAN

Name: Jon Doingitdifferent

Case Number: DJ020216

Employment Specialist: Jamie

VR Counselor: Wayne

Job Goal: Mechanic Helper

Approx. Hours Required: 120

Date of 60-day follow up meeting: 1/25/20

Number of hours wanting to work: PT (up to 20) FT (up to 40)

Wage: \$13

Eligible for Supported Employment? Yes No

If eligible, what services are being provided, who is providing them, and how are they being provided?

Support Team: Wayne

Agency: ALL TRIBE VRP

Jamie

Agency: ALL TRIBE VRP

Tim

Agency: Anytown Auto Repair

Agency:

Agency:

Transportation: Personal Vehicle

Strengths: Dedicated to employer, timely, dependable (as long as medicated), mechanical knowledge, welding experience, tool knowledge.

Barriers: Limited mobility, limited time standing, limited lifting/carrying of weight.

Accommodations required: Time to adjust to work requirements, frequent short (10 minute) breaks to sit down, and opportunity to sit while working.

Participant expectations for ALL TRIBE VRP: Assist with paperwork, assist with training needs, and provide mediation with employer.

CBA: Yes No Possibly

Explanation: Participant already job shadowed. Tim offered him employment.

Participant Responsibility:

- Notify job coach within 12 hours if canceling an appointment
- Attend all appointments ready for work
- Participate in all agreed-upon activities
- Notify job coach of employment within two days of getting a job

Participant Signature

Date

Employment Specialist Signature

Date

6. Closure

Closure Letter

ALL TRIBE VOCATIONAL REHABILITATION PROGRAM
PO Box 101
Anytown, MT 59043

Jon Ima Doingitbetter
101 Nowhere Street
Anytown, MT 59043

April 3, 2020

Dear Jon,

Congratulations! You have maintained your employment for at least 90 days, and your case will be closed as "successfully employed." I have enjoyed our time together and wish you the best of luck in your future endeavors.

Post-Employment Services (PES) are available for qualifying events related to your employment. Please remember that if you have any employment issues, you can contact the VR office to request assistance.

If desired, you may request "conciliation" (a review of this decision and discussion with a supervisor or a counselor). To do so, please contact your counselor or Sally Newvision, Program Director, at 2312 Hope Street, Anytown, MT 59043, 406-342-4321, Ext. 25.

If you are dissatisfied with this decision, you may appeal within 45 days of the date of this letter. Send your appeal to the Social Services Director at ALL TRIBE, PO Box 101, Anytown, MT 59043, or call 406-342-5678.

You can also contact the CAP advocate at 1-888-234-5678 to assist you with exploring your options.

Sincerely,

John Doe
Rehabilitation Counselor

Successful Closure Checklist and Consultation Form

Participant Name: Jon Doingitdifferent

Date: 4/3/20

Checklist:

- Participant has maintained employment for 90 days
- Participant and VR counselor consulted about closure
- Closure letter has been sent
- Post-employment services were explained and are not required
- Client Assistance Program was reviewed

Rationale for any consultation items not completed: NA

Compatibility Checklist:

- Position is compatible with participant strengths, interests, capabilities, and limitations caused by disability(ies)
- Work environment is integrated
- Participant is compensated at or above minimum wage. Wages and benefits are typical for individuals without disabilities performing the same work.

Rationale for any compatibility items not completed: NA

Significant services provided contributing to the employment outcome: Jon required OJS in the form of assistance filling out applications, developing resumes, practicing interview skills, initial job training, and follow-up support for 90 days.

- Participant has stabilized at worksite and extended services are immediately available.

Job Title: Shop Assistant

Employer Name: Tim's Auto Repair

Employer Address: 1010 Happiness Lane

City: Anytown

State/Zip Code: MT 59101

Employer Phone: 406.342.4567

Employment Date: 01/04/2020

Supervisor: Tim

Hours per week: 40

Hourly Wage: 15

Weekly Earnings: 600.00

Counselor Signature

Date

7. Post-Employment Services

Post-Employment Services Case Notes

Case Note

Participant Name: Jon Ima Doingitdifferent
Counselor: Wayne

Case Number: DJ020216
Date: 6/14/20

Jon called and asked if I had any free time today for him to swing by the office. I told him I could meet at 10:30am, and Jon stated he would be here.

Jon informed me that Tim has provided him with an opportunity to expand the repair shop's services to the community. Jon can attend a certification course on tires, wheels, and use of a tire machine. When asked what he needed from VR, Jon stated that he needs assistance in paying for the training, transportation to the training, and lodging. I asked how Jon was going to pay for meals while attending the training. He stated that after his bills for the month he has saved enough money to pay for his meals but can't squeeze out the rest from his budget. I asked Jon to provide me with the training information and I would follow up on it.

I called and spoke with Tim to find out specifically how this training would benefit Jon's employment situation. Tim stated that Jon has been stepping up and completing all job duties as assigned. He is very pleased with Jon's performance. This would be a promotion for Jon, and he would also get a pay increase. Tim stated that the shop isn't making enough money to pay for the training, especially after purchasing the tire machine.

Jon returned with the training information. The training is in Sheridan, WY and will last two weeks. Jon found a hotel that is connected to the training and offers a lower rate when registering for the training. I agreed that this would qualify for post-employment services and as of this case note will be opening the case under PES.

Next steps: complete PES IPE, register for training, and reserve hotel.

WD

Case Note

Participant Name: Jon Ima Doingitdifferent
Counselor: Wayne

Case Number: DJ020216
Date: 6/15/20

Jon came into the office today to review and sign the PES IPE Amendment. Jon approved and agreed to the PES amendment. A copy was provided to Jon after signature. We got online to register for the training, reserved the hotel, and printed the confirmation documents. Next, I provided Jon with a fuel card in the amount of \$300.00. Jon understands the requirement of collecting and submitting all receipts to me upon his return.

Jon stated that he was very appreciative of this opportunity and will see me in three weeks. I reminded Jon that we have an employment specialist if he feels the need for additional support when he returns.

Next steps: complete training, submit all receipts, and provide a copy of the certification.

WD

Case Note

Participant Name: Jon Ima Doingitdifferent
Counselor: Wayne

Case Number: DJ020216
Date: 7/5/20

Jon brought in the receipts and the certificate of completion on this date. He informed me that the tire machine is being delivered tomorrow and that he is excited to begin providing this service. Tim has been advertising this added service to the community and they already have a waiting list.

I asked that Jon keep me posted on his work progress and to let me know if anything else is needed.

Next steps: Jon will check in with me next week.

WD

Case Note

Participant Name: Jon Ima Doingitdifferent
Counselor: Wayne

Case Number: DJ020216
Date: 7/13/20

Jon called me to provide an update on his progress. He informed me that he has been repairing tires for most of his days now. I asked if he was getting burned out and Jon stated that this was good for him as it is allowing him to complete his learning. This hands-on practice has cemented the training into his skills. Jon was happy to inform me that he is now earning \$18.50 per hour. He informed me that this is the highest wage he has ever earned!

I told Jon that due to his success in advancing and maintaining his employment, I was going to close his post-employment services with VR. Jon agreed and thanked me again for the assistance.

Next steps: Complete closure notes.

WD

Case Note

Participant Name: Jon Ima Doingitdifferent
Counselor: Wayne

Case Number: DJ020216
Date: 7/13/20

Due to the success of Jon's training, he has been able to advance and maintain his employment. This indicates that the PES provided under the PES IPE Amendment were beneficial in successfully maintaining employment. This case will be closed as successfully maintained/advanced employment.

Jon has received a salary increase to \$18.50/hr and is maintaining his hourly schedule of 40 hrs/week. Jon has been informed of the closure on this date via phone call. The closure letter will be sent out on this date as well.

WD

Post-Employment Services Closure Letter and Certificate of Achievement

July 13, 2020

Jon Ima Doingitdifferent
101 Nowhere St.
Anytown, MT 59043

Dear Jon,

Congratulations! You have advanced and maintained your employment with the support of post-employment services. Since your employment has been maintained and you are advancing in this employment, your case will be closed as successfully maintained. I enjoyed our time working together and wish you the best of luck in your future endeavors.

Post-employment services are available for qualifying events related to your employment. Please remember that if you have any issues with your employment you can contact the VR office to request assistance.

You may request “conciliation” (a review of the decision and discussion with a supervisor or a counselor). In order to do so, please contact your counselor or Scally Newvision, Program Director at 2312 Hope Street, Anytown, MT 59043, 406-342-4321, Ext. 25. If you are dissatisfied with the program decision you may appeal the decision in writing to: Social Services Director, ALL TRIBE, PO Box 101, Anytown, MT 59043, or by telephone at 406-342-5678 within 45 days of the date you are notified of the decision. You can also contact the CAP advocate at 1-888-234-5678 to assist you in exploring your options.

Sincerely,

Rehabilitation Counselor

CERTIFICATE of ACHIEVEMENT

THIS ACKNOWLEDGES THAT

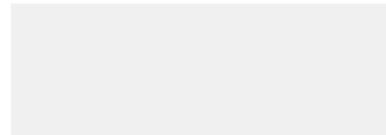
Jon Ima Doingitdifferent

HAS SUCCESSFULLY COMPLETED THE

Tire Repair Certification

07/02/2020

Taylor The Tire God, Trainer



8. Administration

Loan Agreement of Equipment

Name: Jon Doingitdifferent

Case Number: DJ020216

The listed equipment being issued for this participant's employment plan may not be sold, used as collateral, pawned, disposed of, or used for any purpose other than that intended in the participant's Individualized Plan for Employment (IPE). Failure to comply may result in prosecution. The equipment may be returned to ALL TRIBE VR staff when the purpose for issuance no longer exists, or when it is no longer needed to achieve the planned employment goal. Such property is to be kept in good condition without abuse or misuse and available for inspection at all times. The right and title to the equipment is vested in the ALL TRIBE VR program until such time title to the equipment may be released.

Equipment List in IPE:

Description	Serial Number	Value	Date Issued	Date Released
Craftsman tool set - 400 pc	All Tribe Tag #4554345432	300.00	12/1/2019	
Ingersoll Rand Air Impact Gun 1/2" drive	All Tribe Tag #455435433	150.00	12/1/2019	
Ingersoll Rand Air Impact Gun Set 3/8" Drive	All Tribe Tag #455435434	200.00	12/1/2019	

I understand the provisions above and that the loan agreement on the equipment is based on my compliance with these provisions.

Participant Signature

Date

Counselor Signature

Date

Distribution: Original – Participant File
Copy – Participant

Release/Receipt for Equipment and/or Other Goods

Name: Jon Doingitdifferent

Case Number: DJ020216

Release of Title:

Our records indicate that you are using equipment and/or other goods purchased and issued by ALL TRIBE VR Program. As reflected in your case record, the ALL TRIBE VR Program hereby releases title to you on the equipment and/or other goods issued. In the future, if you discontinue using the equipment and/or other goods as reflected in your case record, this office would appreciate its return so that someone else who may need such equipment can benefit from it.

Description	Serial Number	Value	Date Issued	Date Released
Craftsman Tool Set - 400 pc	All Tribe Tag #4554345432	300.00	12/1/2019	4/3/2020
Ingersoll Rand Air Impact Gun 1/2" drive	All Tribe Tag #455435433	150.00	12/1/2019	4/3/2020
Ingersoll Rand Air Impact Gun Set 3/8" Drive	All Tribe Tag #455435434	200.00	12/1/2019	4/3/2020

Participant Signature

Date

Counselor Signature

Date

Distribution: Original – Participant File
Copy – Participant

9. Financial

Post-Employment Services Requisition Submission

ALL TRIBE VR STAFF: Wayne Dagele CASE FILE #: DJ020216

Description of Request (e.g., meals/reimbursement/project Supplies – include participant initials)	Amount Requested
Tire Guy Training	\$1,400.00
Lodging	\$450.00
Transportation/Mileage costs	\$300.00

Second Requisition Submission

ALL TRIBE VR STAFF: Wayne Dagele **CASE FILE #:** DJ020216

Description of Request (e.g., meals/reimbursement/project Supplies – include participant initials)	Amount Requested
Tobacco from Trading Post	\$30.00
Prayer Clothes from Trading Post	\$45.00
3 Bundles of Wood from Little Deer	\$50.00
Food Basket from IGA Grocery	\$200.00
Blanket from Trading Post	\$50.00

10. Templates and Additional Examples

Initial Case Note Template

Initial Case Note

Participant Name:
Counselor:

Case Number:
Date:

Reason for Referral:

Reported Disability/Impediment to Employment:

Work, Education, and Medical Considerations:

Expressed Interests, Abilities, & Preferences:

Counselor Observations & Plan of Action

Case Note Template

Case Note

Participant Name:
Counselor:

Case Number:
Date:

Example Counseling and Guidance Initial Case Note

Initial Case Note

Participant Name: Dave Doingitdifferent
Counselor: Jamie Emanuel

Case Number: DJ020216
Date: 8/27/19

Reason for Referral:

To get assistance in finding a job.

Reported Disability/Impediment to Employment:

When asked to describe his disability, Mr. Doingitdifferent stated he was diagnosed with an intellectual disability in grade school. He was also diagnosed with ADHD and an anxiety disorder as a child. He is currently taking medications, as listed in his intake. He reports having trouble starting on tasks and being hyper. He said he has trouble sometimes when he is in a crowded place or if he has too much information to comprehend at one time. He stated that he tried to get his driver's license, but when too many cars were around he got anxious and felt like he couldn't handle it. He stated that he has problems remembering things correctly. He also shared that he doesn't really like computers, but he does like to chat, text, and talk on social media with his friends. He states he has trouble staying focused on assigned tasks and gets distracted easily.

Work, Education, and Medical Considerations:

VOCATIONAL INFORMATION:

Mr. Doingitdifferent's most recent job was as a clerk at the Goodwill thrift store. He worked with his job coach with a state VR vendor named XYZ Co. He completed a trial work experience through XYZ Co. but states his trainer told him he was not employable due to his disability and inability to stay focused on tasks. He states he really likes to read and play video games. He would like to work at a job involving video games, talking to people about how they work, how to play them, etc. He also said he worked at a library for a while during school as a student aid worker and that he would like to work there again. Except for his "talking too much to people", he feels this would be a good job.

EDUCATIONAL INFORMATION:

Mr. Doingitdifferent reports he graduated from high school. He liked his friends in school the best. He says he was in special education classes and reports that he had an IEP throughout school. He states he has had no other schooling or vocational training since high school.

SOCIAL/ECONOMIC INFORMATION:

Jon stated he was born in TX, and then moved to MS around the age of seven. Right now, he lives with his biological parents and one of his brothers. He stated that he has two brothers and that all three of them have "problems." All of his siblings have a disability that is very similar. He says they get along well for the most part but there

were some rough times as a kid. He said his brothers were all older and he didn't always get along well with them. He said he has no other family members with disabilities and does not have a history of abuse. He has never really considered living away from his parents. He reported being independent in daily living activities, but his dad manages his money. He reported no legal issues. Mr. Doingitdifferent does not have a driver's license and depends mostly on his parents or brothers to take him where he needs to go. He states he feels like he could ride public transportation but his mom doesn't think so and there isn't much available in the area.

Expressed Interests, Abilities, & Preferences:

Mr. Doingitdifferent talked about needing help to obtain and maintain employment. He stated that he was motivated to work closely with TVR in order to determine what VR services would be necessary to obtain and maintain his employment. He says he would like to do something like stocking shelves, putting away inventory, putting away books, or helping to sell products. He states that he would really like to work at Game Stop or at a big book store. He seems unsure about full time or part time work.

PARTICIPANT GOALS AND EXPECTATIONS:

Mr. Doingitdifferent talked about needing help to obtain and maintain employment. He stated that he was motivated to work closely with TVR in order to determine VR services necessary to obtain and maintain his employment. He says he would like to do something like stocking shelves, putting away inventory, putting away books or helping to sell products. He states that he would really like to work at Game Stop or at a big book store. He seems unsure about full time or part time work.

Counselor Observations & Plan of Action

Mr. Dave Doingitdifferent, 23-year-old single Native American male, was a self-referral. He arrived for his appointment 10 minutes early. His great-grandmother was in attendance per Mr. Doingitdifferent's request. Mr. Doingitdifferent did offer some knowledge of his background, abilities, and limitations. He was clean and dressed appropriately and made good eye contact. He did seem to have a basic understanding of his disability and being diagnosed at a young age. Jon walked without assistance and spoke easily with the VRC. He informed this VRC he receives no income currently but does receive SSI payment each month; his great-grandmother is his designated payee and gives him an allowance each week. He stated he has never worked in the past. This client has some behavior issues (such as lack of judgment in certain social situations) and low social skills (such as immature behavior for his age and relying heavily on his great-grandmother to answer the majority of the questions asked). Although Mr. Doingitdifferent was very social, he talked about trivial topics and deferred to his great-grandmother in regard to questions requiring information about his disability and his ability to work.

He repeatedly tried to insert humorous content into conversation but lacked certain understanding of the correct context or appropriateness in specific situations. Mr. Doingitdifferent states he has had previous services from state VR which were Transition School to Work (TSW)-related while he was in junior high and high school.

He lost contact with the office and previous VRC and did not follow up when loss of contact letters were sent to him. VRC went over the VR Intake Application and the Authorization of Release of Records. Jon signed the necessary paperwork, including the VR application signature form, Code of Conduct form, and the voter declination form. Mr. Doingitdifferent chose not to register to vote and was offered the necessary forms and assistance to do so. VRC made a copy of the documentation he brought with him, including: Tribal Membership Card, Driver's License/ID and social security card. Jon had no issues in filling out the ROIs and understood the disclosure statements.

TVR GOALS AND EXPECTATIONS:

Mr. Doingitdifferent was advised that eligibility for services will be determined and he may need additional assessments which would aid him in relationship to TVR services. We talked about his need to establish full and active participation in all aspects of the TVR process. VRC informed Mr. Doingitdifferent that following an eligibility decision, there was a 90 day pre-IPE planning period in which to develop his IPE. Mr. Doingitdifferent was informed and given a copy of the programs's Code of Conduct (which he signed), the Owner's Guide to Work, Conflict Resolution Procedures (including the Client Assistance Program Brochure, which explains clients' rights and responsibilities), a brochure on SSA Freedom to Work, and an explanation of the Confidentiality Policy.

Next steps will be gathering medical documentation, reviewing for determining eligibility, and scheduling the next appointment after eligibility.

MUTUAL EXPECTATIONS/DECISIONS REACHED:

Jon was advised that a decision for eligibility would be forthcoming and that additional assessments may be needed. Jon requested guidance and support from this VRC during the TVR process.

ACTION STEPS:

- Determine eligibility for services with requested and needed documentation.
- Case was placed into Application Status March 3, 2019.
- Determine a realistic vocational goal.

PARTICIPANT ASSESSED NEEDS:

Vocational guidance and counseling
Career Exploration
Job Development and Placement

PARTICIPANT STRENGTHS:

- people-oriented
- likes to talk to people

- signed, TVR Counselor, VRC

Example IPE Justification Case Note

Case Note

Participant Name: Jan Doingitdifferent
Counselor: Jamie Emanuel

Case Number: DJ020217
Date: 08/27/19

Jan and VRC met today to jointly develop her IPE. Jan is looking for a job that's entry level and part time to supplement her SSDI income, perhaps a home-based computer job or office clerk. IPE objectives were selected related to the services required for successful employment and meet the financial need in a competitive employment environment.

Jan reports that her primary disability is brittle bone disease. Jan states she is stable on her medications and is active in her counseling program. Jan also reports chronic pain in her back and neck from two disc fractures, as well as problems with stamina, lifting, standing, and squatting. She also has issues with anxiety and nervousness. We were able to identify 6 Major Life Activities and the necessary services in relation to her disability, functional limitations, and ability to work.

The Major Life Areas affected are Interpersonal Skills, Mobility, Self-Care and Home Care, Self-Direction, Work Skills, and Work Tolerance.

1. Other mobility functional limitations: Limited range of motion on left side due to left rotator cuff.
2. Unable to manage personal health at a level to prepare for or maintain employment.
3. Unable to identify steps necessary to reach goals due to physical/mental health problems.
4. Unable to perform tasks at a competitive work pace due to stamina problems.
5. Unable to work for an 8-hour day with breaks every two hours due to limitations in mental or physical stamina.
6. Unable to sit/stand for more than 2 hours.

Jan, along with her VRC, has completed labor market research and conducted informational interviews. In researching career options, office clerk appears to provide the best work environment to utilize her existing transferable skills compatible with her limitations. The following services are listed in the IPE:

1. VR Counseling & Guidance
2. Employment Services
3. AT Assessment
4. Functional Capacity Assessment

Jan is currently prescribed medications from her own personal doctors to help manage her symptoms.

Total Plan Projected Costs = \$2,852.00

Jan does meet economic need. Jan has agreed to participate and complete all IPE requirements in a timely manner and has signed the agreement. She will continue to keep monthly contact with VRC and continue to actively participate in her VR program. VRC will continue to provide vocational guidance, counseling, and planning to support a successful employment outcome.

Example Presumptive Eligibility Case Note

Case Note

Participant Name: Jan Doingitdifferent
Counselor: Jamie Emanuel

Case Number: DJ020217
Date: 08/27/19

PRESUMPTIVE ELIGIBILITY

VR counselor used the following information to determine that Ms. Doingitdifferent has a disability-related impairment which directly impacts her ability to prepare for, enter into, and maintain employment: Primary Care Physician medical records, Bone Disorder Specialist medical records, VR Application, and Initial Intake interview.

Verification from Social Security indicates that Ms. Doingitdifferent is currently receiving SSI in the amount of \$733.00 due to her disability, therefore she is presumed eligible. She intends to go to work and there is no reason to believe that he cannot benefit from services in terms of an employment outcome.

When asked about her disability, Jan reports that she has been diagnosed with Osteogenesis Imperfecta (brittle bone disease). Her symptoms include multiple fractures; delay in union of bone repair; problems lifting, standing, pushing, and pulling; loss of strength and stamina; and restriction of mobility.

When asked what she needs from vocational rehabilitation, Jan states he wants to work in the community.

It is presumed that Jan can benefit from VR services including vocational guidance and career exploration. It is likely that Jan could also benefit from Supported Employment services provided by a job coach to help her maintain employment.

When asked if she understands the process and her responsibilities in the vocational plan, Jan responded yes and said she is willing to work with her counselor to reach this employment goal.

ALL TRIBE VR CASE FILING PROCEDURE

Section Entries are in Chronological Order

Side 1: The Plan

- A. IPE, IPE amendments, IPE extensions, annual reviews
- B. Initial and ongoing financial summaries (if completed)
- C. Statement of service responsibility (substance abuse form)

Side 2: The Story

- A. Application, proof of residency, proof of enrollment, case notes, certification of eligibility, and presumptive eligibility
- B. Correspondence: letters, emails, etc.
- C. Rationale for goal selection (form attached to IPE)
- D. Summary assessment (completed only if assessment is done)
- E. Eligibility extension form
- F. Closure outcome form
- G. Closure letter

Side 3: Training/Job Seeking

- A. Referral form to employment specialist
- B. Job plan from employment specialist
- C. OJT forms/contract
- D. Business plans
- E. Career exploration documentation
- F. Background check
- G. Professional licenses
- H. Resume
- I. PASS plans
- J. Financial aid & PELL forms
- K. College/Votech progress reports and grades
- L. VA, private rehab reports/documentation

Side 4: Diagnosis & Treatment

- A. Initial medical information (includes voc eval and psych evals)
- B. Medical/psychological consultant reviews/comments
- C. Future medical information
- D. Letters from professionals clarifying eligibility/diagnosis/treatment
- E. Child study team reports and IEP
- F. Functional capacity evals

Side 5: Administration

- A. Release of information forms and letters
- B. Loan agreement/assignment forms
- C. Supported employment sign-off, SE status change forms
- D. Ticket to work
- E. HIPAA paperwork
- F. SSA information and letter
- G. Proof of insurance, driver's license
- H. Administrative review forms/decision

- I. Trust documents
- J. Benefits planning

Side 6: The Money

- A. Requisitions with copies of service request, quotes, check, and receipts
- B. Bids, estimates, and purchasing information (vendor name)