Purpose:

Assessment:

Position:

Date started:

Wage/benefits:

Number of hours:

Description of how position aligns with IPE:

Intervention:

Provided guidance and counseling by:

Plan: (Specific next action steps for counselor and client before next meeting)

Counselor next steps:

Client next steps:

Next meeting (no more than 30 days)

Assessment:

How was the client assessed?

- A description of the individuals strengths, resources, priorities, concerns, abilities, capabilities, career interests, and informed choice.
- The specific employment outcome chosen by the client that is consistent with the strengths, resources, etc.
- Summary of learnings of assignments up to this point (informational interviews, job shadows, research, onet search, discovery process, review of IEP, review of ICP,

review of any other materials gathered such as resumes, work history, and past work performance

- Background information and evidence around goal
  - (Notes - simply stating an individual has worked in a field, is not evidence that they worked well, enjoyed the position - did they advance in the position? did they receive raises? were they promoted. Also - simply stating a client worked at Lowe's is not enough to identify what the individuals skills are - did they work in stocking, ordering, customer service, maintenance, as a cashier, loading materials, etc. Finally - it is recommended that if the client is in a job, that you potentially do a worksite assessment (either yourself, or with an RTS) as a part of the assessment process to really look at the job and the needs for the client to be successful.)
- Concerns client shared around the IPE and specific examples of concerns.
- Information shared which may affect IPE goals.
- Summary of barriers to employment identified and accommodations used in the past to address the barriers. **<u>(This determines need for services indicated on the plan for employment.)</u>**
- How many hours a week does the individual want to work?
  - If less than 40 hours, we should be considering benefits planning as a part of the assessment process. If under 20 hours, we should be identifying how the individual is engaged the rest of the week that prevents them from wanting to work less than part time.
- Summary of counselor perceptions, concerns, or other knowledge regarding the chosen goal. (Why do you believe the goal is feasible/realistic

- What did you do?
  - We should be using at minimum a review of past work history, interest inventories (not simply a conversation about what the client likes to do), assessments done in the community, review of informational interviews or job shadows with the client,etc. Did you provide information about particular careers, review a job description with the client, discuss the need for training and accommodations, etc.
- Statement indicating agreement/disagreement with goal of <u>“client’s chosen goal” and “Specific job type”</u> if known .
- Statement indicating the agreement of criteria for review have been set and agreed upon jointly.
- Indicate that you provided the client with information about rights and responsibilities and the availability and contact information for the Iowa Client Assistance Program (CAP).
- Information for the authorizations you have issued or plan to issue for this individual. (For example, if you feel a hearing screening is needed, indicate in the case note that you will be authorizing payment for a screening and the amount authorized.)

Plan: A statement indicating the case moves from Status 10 to 12 or other status once approved.

- Explanation of next steps for client and counselor.
  - Especially if you didn't have the client sign the client response form as absolutely no services can begin until this form is signed. This means that you

should not be doing referrals or authorizations until the client response form is signed - (Support staff can help to ensure that this is gathered, however, based on several recent case reviews, client's have not been turning these in).

- Assignments given to the client.
  - There should always be a next step for the client and a next meeting should be set (this is to ensure early engagement and can be an opportunity to ensure that the signature is obtained.