Individual Plan for Employment

Prior to completing the plan in the CMS, the plan data elements and employment screens need to be completed first. These are only required at initial IPE.

- Go to Plan Data Elements tab
- Complete all required sections
- Save
- Go to Employment tab
- Complete employment at initial plan – if none, enter NA for employer name and job title
- Save
- Go to Plan
- Complete all required information:
    - Employment goal and job title can be the same name.
    - Responsibility and Resources
        - Responsibility can be left blank – if so, then complete the client responsibilities as the criteria for review.
        - If you choose one of the drop-down boxes, client responsibilities will auto populate depending on what you choose and you will need to edit it to reflect all of the criteria for review.
    - Review date – should be no longer than one year
    - Services – choose all services agreed upon with the service dates and provider.
    - Send to support staff for review
      *If you forget to complete the Plan Data Elements tab and Employment tab, you can navigate to the Quick Menu and complete them there then you won't lose your plan.
    - Sign the plan – you will have to navigate back to the bottom of the page and find the pencil icon.
    - Complete the IPE case note in program notes

IPE Approval Steps

- Support staff review plan and sign it
- Support staff send to supervisor for approval
- Supervisor reviews the plan and signs it
- Supervisor sends back to support staff to send plan
- Once the client response form is received, support staff or VRC put the date in the field Client Signature Received
- VRC receives an email Plan is Final
- There is a direct link to the client's plan in the email
- VRC go to plan and navigate to the bottom of the plan
- Generate Plan Cover Letter
- A program document opens for VRC to name the document, edit the letter, and save it
- Support staff sends out letter and marks the plan sent