

Counselor and Support Staff Checklist

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Application

Counselor

Forms to take to the meeting:

- VR Application release for services
- VR Application (if not entering it on computer at the meeting)
- SSN entered correctly
- Health assessment form
- General release of information (minimum of 5)
- U of I release of information
- SSA releases
- Work history
- Client rights and responsibilities
- CAP
- Voter registration
- Eligibility aid

Enter into eFORCE *As soon as possible*

- Start new case
- Application screen
- Application case note (See appendix 1)
- Work history
- Blind journal

Send to support staff (Make sure all is filled out and signed) *Within 1 week*

- Application release for services
- Health assessment
- ROIs
- Voter registration

Support Staff

Forms and completed and signed:

- Application release for services
- ROIs
- Health assessment
- Voter registration
- Eligibility aid (not required to sign)

Enter into eFORCE

- ROIs
- External assessments (IESBVI, IEPs, etc)

Other

- Send/Fax ROIs
- File paperwork

Eligibility

Counselor

- Review medical reports
- Complete the eligibility aid with client
- Complete the eligibility screen
 - List of barriers
 - Check boxes of barriers
 - List of services required based on barriers
 - SD or MSD determined
 - If MSD selected, secondary diagnosis documentation on file
 - Diagnosis(es) are documented with date of report and doctor name
 - Analysis of psychological, educational, vocational, and social completed
- If secondary diagnosis, there is medical documentation to support it
- Print the eligibility certificate
- Sign and send the eligibility certificate and eligibility aid

Support staff

- List of barriers completed
- Barriers are check boxed
- SD or MSD determined
 - If MSD selected, secondary diagnosis documentation on file
- List of services completed
- Diagnosis(es) are documented with date of report and doctor name
- Analysis of psychological, educational, vocational, and social completed
- If secondary diagnosis, there is medical documentation to support it
- Eligibility certificate signed
- File eligibility certificate

IPE

Counselor

- Interest/skills inventories (or some other assessment) completed
- Labor market research complete
- LMI form

Complete case note (see appendix 2)

- Enter IPE into eFORCE and reassign to support staff

After approval

- Print IPE and sign
- Send IPE to support staff

Support staff

- Review to ensure all components are entered
- Ensure case note is complete
- Reassign to supervisor for approval

After approval

- Send IPE to client with a client response form
- File the IPE into permanent paper file

IPE Review

Counselor

- Enter in review date
- Enter in next review date
- Enter case note (See appendix 3)

IPE Amendment

Counselor

- Review plan
- Enter amendment
- Enter case note (See appendix 4)

After approval

- Print IPE amendment and sign
- Send IPE amendment to support staff

Support staff

- Review to ensure all components are entered
- Ensure case note is complete
- Reassign to supervisor for approval

After approval

- Send IPE amendment to client with a client response form
- File the IPE amendment into permanent paper file

Authorizations

Counselor

Enter case note (see appendix 5)

Enter authorization into eFORCE

- Correct authorization type
- Appropriate service for the authorization
- Authorized item and amount
- Correct address and phone number for delivery
- Complete dates the authorization is in effect
- Reassign to support staff
- Maintenance voucher signed (if maintenance authorization)

Support staff

- Correct authorization type
- Correct service type
- Proofread item description(s)
- Correct case note is attached
- Check case note for justification
- Reassign to supervisor for approval
- Once approved, print authorization for file
- Send to vendor (and client if appropriate)

Closures

Counselor

- Service history screen
- Programs closed
- Closure screen
- Closure case note (See appendix 6)
- Closure letter to support staff
- Print closure amendment and sign
- Send closure amendment

Support staff

- Closure letter into eFORCE
- Closure and closure letter sent
- Survey and survey letter sent

Appendix 1

Application

Purpose: Complete the application

Assessment:

- Statement indicating the individual is interested in going to work
- Summary of client's current situation:
 - What is their living situation?
Do they have a support system?
- Have they worked in the past?
Why aren't they working now?
- What skills/training do they have?
- What skills/training do they need to work again?
- Medical issues that will impact their work?
- Any other pertinent information

Intervention by counselor:

- Describe VR services and the rehab process
- Complete health assessment
- Complete ROIs for necessary parties
- Review rights and responsibilities and CAP
- Start the eligibility aid (assess barriers-mobility, communication, self-care, self-direction, interpersonal skills, work skills, work tolerance)
- Explain eligibility process

Plan: Send in ROIs for medical documentation. Meet again once eligibility is determined.

Appendix 2

IPE

Purpose: Develop plan for employment

Assessment:

- Current knowledge, skills, abilities
- Current situation (school, working part time, wanting to change career, recent change in health, etc)
- Related experience to career goal identified
- Training requirements (travel skills, accessing public transportation, computer skills)
- Supports that may be required to be successful (transportation, job coach, etc)
- Labor Market Information (LMI)
 - Skills/abilities/education required
 - Essential functions of the job
 - Wage and hours for the area
 - If necessary, is individual willing to move for more opportunities?

Intervention:

- Completed assessments/researched LMI
- Provided guidance and counseling by jointly developing plan for employment with career goal of...
- Established services required to obtain goal
- Criteria for review were set
- Rights/responsibilities and CAP

Plan: Begin services once plan is approved. Client's next steps (Johnny will....research education programs, send current resume, etc)

Appendix 3

IPE Review

Purpose: Review plan for employment

Assessment:

- Review of progress with criteria for review
- Review services and service dates

Intervention:

- Provide guidance and counseling

Plan: Meet again (date) to (next activity)

Appendix 4

IPE Amendment

Purpose: Amend plan for employment

Assessment:

- Current situation
- Reason for amendment

Intervention:

- Provide guidance and counseling
- Review plan
- Review rights and responsibilities and CAP

Plan: Amend plan and identify next steps

Appendix 5

Authorization

Technology

- Summary of the client's current situation
- Reason/need for the authorized item
- Comparable benefits have been explored
- Technology recommendation and summary of quotes are in eFORCE if over \$500
- Guidance and counseling provided and checked
- Plans for delivery and training of the authorized item

College training

- Summary of the client's current situation (college name, progress, etc)
- Statement indicating required paperwork has been received
- Comparable benefits have been explored (grants/scholarships)
- Guidance and counseling provided and checked
- Plan for next meeting

All other authorizations

- Summary of the client's current situation
- Reason/need for the authorized item/service
- Guidance and counseling

Appendix 6

Closure

Purpose: Close case

Assessment:

- Current situation
 - If working: wages, hours, benefits, etc. Identify that it aligns with IPE
 - If not working: reason for closing case unsuccessfully
- Summary of services provided over life of case
- Education level at closure

Intervention:

- Provide guidance and counseling
- Review rights and responsibilities and CAP

Plan: Close case and send closure letter