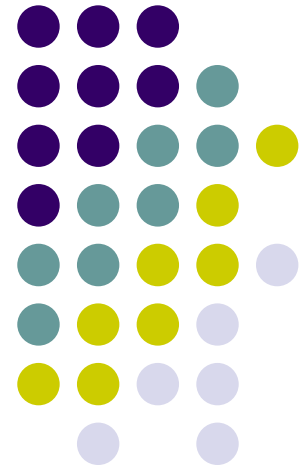
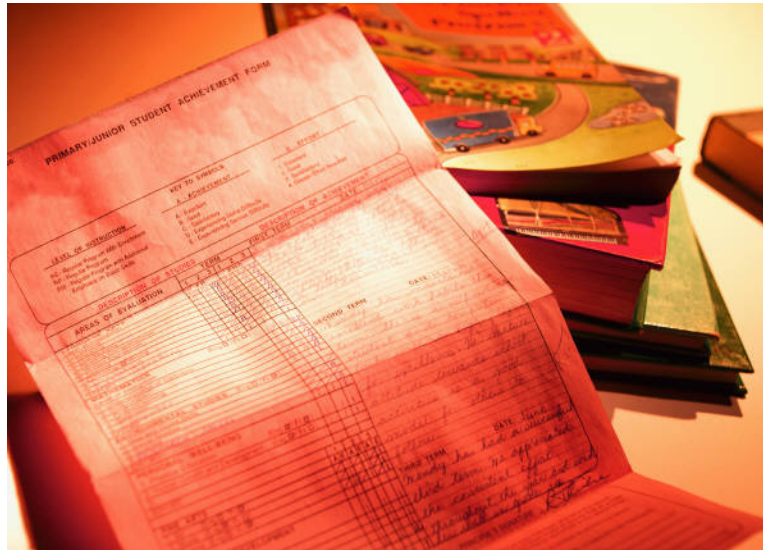


# DVR Technical Specifications – Reporting Requirements

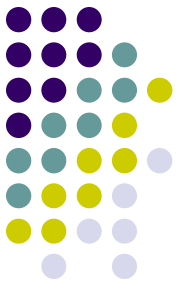
## DVR Staff Training Sessions 2008





# Session Overview

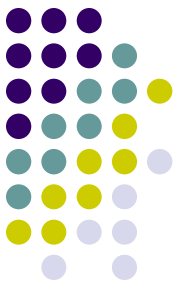
- Reporting Principles and Issues
- Tech Spec Reporting Requirements
- Report Samples and Resources



# Why Reports?

- To aid in case planning
- To document service provision
- To allow for mid-course adjustments
- To facilitate receiving
- To communicate where we are at and where we are going



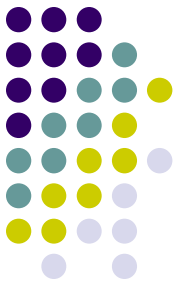


# Reporting Principles

## Content trumps Format

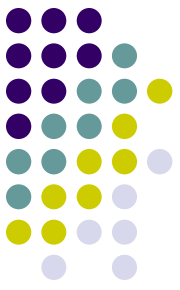
- Boilerplate can get in the way
- Specific to individual consumer
- Specific strategies and actions
- Content trumps Length
  - No longer than necessary
- Information useful to consumer – it's about them, not us
  - Now seeking consumer satisfaction for all services
- Reflect intense service delivery





# Common Issues

- Lack of referral info and specific questions
- Lack of intense job development activity
- Missing 3-way meeting timelines
- Reports long on data / short on info for consumer
- Reports do not tell the Rehab Story
  - Who is this person?
  - Where are they going?
  - How are we assisting them?
- Who are you? Organization, Name, Title



# Benefits Analysis (Under Review)

- Report completed within two months from referral
  - Beneficiary background information
  - Disability
  - Employment & earnings
  - Resources
  - Federal and State benefits
  - Health insurance
  - Work expenses
  - Work incentives
  - Service(s) & supports



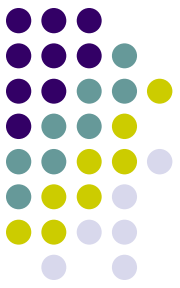
# Vocational Evaluation



**Reports due within 5 working days of completion - electronic format.** Comprehensive evaluation report includes:

Specific vocational recommendations / career options

- Stated interests / goals at completion
- Evaluator's recommendations for steps to prepare for and obtain job goal
- Report shared in understandable manner with consumer.
- Recommended method is a face-to-face staffing including, at a minimum, the consumer, DVR staff and evaluator.



# Vocational Evaluation - OJE

- Hours worked & nature of work performed
- Consumer's reaction to work environment & experience
- Observations by evaluator of work behavior & performance in this setting
- Observations by employer of performance & interaction with other employees / work environment

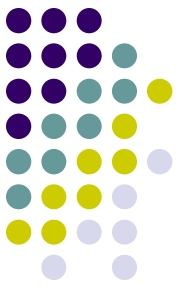


# On-Site Job Coaching (not SE)

Reports due within 5 work days of completion

- Plan for when & where consumer works
- Job / Task Analysis – including Accommodations
- Systematic plan of instruction / support
  - Work skills and behaviors to be acquired
- Plan to develop social / interpersonal skills
- On-site consultation to employer & co-workers
  - Work site / job modifications,
  - Instructional / communication / attitudinal barriers



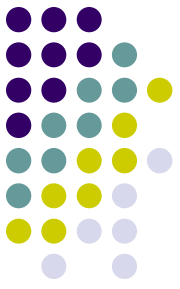


# Employment and Support Plan

Reviewed & revised every 60 days at team meeting

- List of specific jobs
- Initial list of employers to contact
- List of employment barriers & strategies to address them.
- Responsibilities List: consumer, DVR & vendor
- Checklist of employment preparation needs





# Employment and Support Plan

- Conditions for use of internships, work experiences & job coaching
- Plans to use work incentives
- Target wages, hours & special conditions
- Short & long-term employment goals
- Sources of support (e.g. sister drives consumer to work)



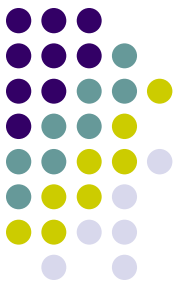
# Supported Employment ESP

Report due within 30 days of initial 3 -way meeting

In addition to ESP specs for Job Development:

- Sources of long-term support - transportation & off-site support needs
- Initial plans for PASS / IRWE work incentives
- Targets / special requirements applying to the availability of long-term support (e.g. anticipated waiting list time).





# Supported Employment ESP

- Reasonable expectation that supports will actually be available after DVR funding. E.g.:
  - Long-term support assurance from county after 2 months
  - Completion of a PASS or IRWE after 1 month
  - Develop budget for family self-pay demonstrating how payment will be made after 2 months
  - Develop written strategy by employer for natural supports.
- Anticipated date of transition to long-term supports

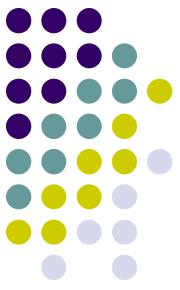
# Job Development Progress Reports – Including SE



**Electronic progress report due 5 workdays after close of each month authorized. Includes both Job Development & Job Retention phase. Report includes:**

- Employer-related activities by Vendor for consumer
- Employers contacted, outcomes & dates of contact
- Employers with whom consultations were held for jobsite analysis, accommodations, etc.
- Description of consumer's general progress – follow-thru





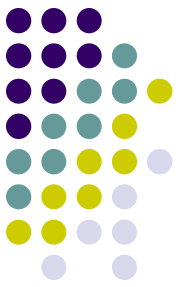
# SE Assessment Reports

**The report is due within five (5) work days of completion of the service, not to exceed 60 days from initiation of the assessment.**

- Individual vocational goals
- Short-term employment objectives
- Description of individual's strengths
- Description of needs for employment supports & anticipated percentage of work time direct supports needed
- Specific strategies needed to support consumer in their goal job.

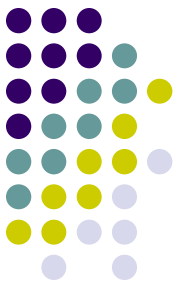


# Supported Employment - Ongoing Support



## Reports due within 5 working days of end of month of service

- Services / strategies used to address performance needs. Include hours worked, expansion opportunities, nature & source of supports, AT needs
- Employment setting, including degree of integration.
- Specific barriers: transportation, recreation/leisure, family & impact of earnings on benefits
- Updates to plan for long-term support
- Estimate time required for successful job stabilization & fading of supports to long-term level



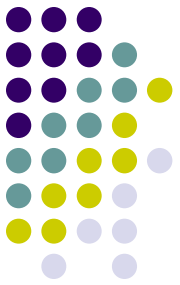
# Job Retention / SE DVR Closure

- Not less than 90 calendar days on job
- All DVR rehabilitation closure criteria are met
- Employer provides verification of comparable wages

## DVR rehabilitation closure criteria:

- Most integrated setting possible
- Consistent with person's interests, strengths, resources,
- priorities, abilities, concerns, capabilities, & informed choice
- Employment can be maintained
- \$ commensurate with community & job standards





# Report Samples

**Resource Materials**

**Frequently Asked Questions**

- [DVR's Technical Specifications & Fee Structure](#)

**Sample Forms & Casenotes**

- [Benefits Management Plan](#)
- [Employment & Support Planning \(ESP\) Casenotes and Plan Example](#)
- [Job Coaching Report Example](#)
- [Supported Employment \(SE\) Assessment Report](#)
- [Virginia Commonwealth University \(VCU\) Supports Assessment Form](#)
- [Vocational Evaluation Example](#)

**Presentations**

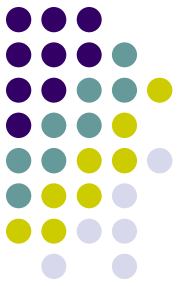
- [Technical Specifications Reporting Requirements](#) (March of 2008)
- [Employment & Support Planning Presentation](#) (March of 2008)

**Policy Guidance**

- [Supported Employment Long Term Support \(Extended Services\) Analysis Procedure](#)

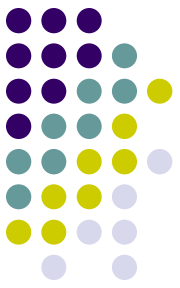
If you need any of the above additional information in an alternate format (i.e., Word document, etc.), please contact [Rick Hall](#) or [Audrey Merten](#).

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# Report Samples

- ESP Casenote and Report
- SE Assessment Outline
- Job Coaching Report Example
- Vocational Eval Example



# Final Comments

- Improvements are being made – thanks!
- A lot of good examples of professional reports
- Further reporting improvements should reflect improved service delivery
- Improved services will lead to more and better employment outcomes
- We need your help to improve outcomes and tell the Rehab Story
- Resources: [http://dwd.wisconsin.gov/dvr/service\\_providers/resources/default.htm](http://dwd.wisconsin.gov/dvr/service_providers/resources/default.htm)