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|  | **Texas Workforce Commission****Vocational Rehabilitation Services****Career Planning Assessment**  |
| **VR Case Information** |
| **Customer Name:** Marsha Wood | **Case ID:** 123456 |
| **Service Authorization (SA) Number:** 455391 |
| **Overview of Career Planning Assessment Activities** |
| The CPA includes multiple visits, which consist of at least 3 hours of home and community exploration (HCE) and at least 6 hours of career exploration and work skills assessment (CE-WSA). If both HCE and CE-WSA are provided in one session, record time as separate entries.  |
| **Date:** | **Number of hours:** | **Type of Visit**  | **Description of activities with customer:** |
| 1/3/22 | 1.5 | [x]  HCE [ ]  CE-WSA | Home visit. Toured home. Interviewed Marsha and Marsha's grandmother. Observed Marsha at home performing chores of watering plants, doing the dishes and playing with the cat. |
| 1/10/22 | 1 | [x]  HCE [ ]  CE-WSA | Visited the customer at ARCIL with Marsha and interviewed Terri Cooke (Marsha's teacher/caseworker). Discussed Marsha's learning styles and management of her anxiety. Observed Marsha in one of her classes. |
| 1/18/22 | 3 | [x]  HCE [ ]  CE-WSA | Met Marsha at her home. Taught her to use Capital Metro app to identify route to HEB, rode bus on route with Marsha. |
| 1/20/22 | .5 | [x]  HCE [ ]  CE-WSA | Contacted Miss Mills, Marsha former teacher, from the 18-21 HS program. Obtained information on Marsha's work experiences while in school. |
| 1/24/22 | 2.75 | [ ]  HCE [x]  CE-WSA | Met Marsha at the local library. Conducted interest finders, researched different career options based on Marsha's interest and skills. Identified information that Marsha might want to learn or try related to her employment interest. Brainstormed potential sites for work observations. |
| 1/31/22 | 3.5 | [ ]  HCE [x]  CE-WSA | Prior to visiting the site, we developed and practiced interview questions. At HEB Blooms informational interview conducted and Marsha arranged flowers. |
| 2/07/22 | 2 | [ ]  HCE [x]  CE-WSA | Prior to the visit with Kelly from Kelly's Landscaping, we developed interview questions. Marsha pushed lawn mower and blew leaves. |
| 2/28/22 | 3 | [ ]  HCE [x]  CE-WSA | Prepared interview questions with Marsha. Informational interview conducted and simulated Marsha locating items from an order, loading them in the basket and how to use the Lowe's App. |
|       |       | [ ]  HCE [ ]  CE-WSA |       |
| **Home and Community Exploration** |
| **Include the customer’s guardian, parents, and any other supports, as needed** |
| **Independent Living Review** |
| **Customer lives in:** [ ]  Own Home/Apartment [ ]  Parent’s Home [ ]  Group Home [ ]  Institution  [x]  Other, describe: Lives with grandmother at the home grandmother owns |
| **Does the customer plan to live at this location once employed?**   [x]  Yes [ ]  No [ ]  To be determined |
| **Does the customer have any responsibilities related to:** Childcare? [ ]  Yes [x]  No Eldercare? [ ]  Yes [x]  No If yes to either, describe:       |
| **What are the customer’s household responsibilities?** Marsha cleans her own room and bathroom which was clean and tidy when Marsha gave me a tour of her home. Assists with sweeping and vacuuming home. She does dishes and own laundry. Marsha feeds her cat and cleans the liter box as well as cares for the plants in the home. |
| **Does the customer require any monitoring or help with daily living skills at home (e.g., prompts to shower, medication management, help cooking and cleaning)?** Marsha is able to make cereal, make sandwiches and warm items in the microwave. Grandmother pays the bills, assists with any task related to money or math, supervises her medications and provides the transportation.  |
| **What is the customer’s daily routine and how can employment fit into that routine?** Marsha gets up in the morning using her cell for an alarm, takes a shower, gets dressed and grooms herself. Next, she fixes herself cereal for breakfast, then watches TV, makes crafts, looks at magazines, completes chores, such as sweeping, mopping, washing the dishes, and simple laundry. On Monday and Friday she attends classes at the independent living center. On Wednesday she is currently taking a class on floral design at the community college. |
| **Select any devices the customer utilizes that might help with employment:** [ ] [ ]  NA-Customer does not use any [x]  Cell Phone [ ] [ ]  iPad/Tablet [ ]  [ ]  Computer/Laptop [ ]  Watch [ ] [x]  Alarm Clock [ ] [x]  Headphones [ ] [x]  Other device: Application on her phone  |
| **List any medical equipment used, such as hearing aids, insulin pump, wheelchair, etc.:** None |
| **Is the customer involved in any community activities or have interest in participating in community activities?** Marsha attends classes at the independent living center on finances, cooking, and social groups. She is currently taking a class on floral design at the community college. Attends church with grandmother occasionally. |
| **What are the customer’s interests and hobbies?** Watching TV, reading, playing with the cat, occasional arts and crafts, social activities offered at the Independent Living Center, classes at community college and floral design |
| **Describe how the customer’s interests and hobbies might transfer to any careers:** Floral design, sweeping, mopping, organizing or pet care |
| **Circle of Support**  |
| **Name:** Pearl Smith | **Relationship:** Grandmother |
| **Phone:** 512-561-2300 | **Email:** Pearl.s@gmai.com |
| **Describe what supports the individual currently provides or could provide in the future:** Provides moral support, transportation, money management/social security reporting, and Marsha lives with her grandmother, Pearl. |
| **Name:** Teri Cooke | **Relationship:** Arcil teacher/casemager |
| **Phone:** 512-282-2445 | **Email:** Terri.Cooke@Arcil.org |
| **Describe what supports the individual currently provides or could provide in the future:** Teaches classes at ARCIL on financial management, independent living and social skills. Also provides case management assisting in setting Marsha with other community resources. Teri maybe able to arrange ongoing transportation training through Capital Metro funded grant. |
| **Name:** Randy Miller | **Relationship:** Case Manager |
| **Phone:** 844-635-3095 | **Email:** randy.miller@bluebonnet.org |
| **Describe what supports the individual currently provides or could provide in the future:** Randy coordinates services offered through Home and Community Wavier that includes support to assist in management of the Marsha's depression and anxiety as well as supports to related to Marsha’s intellectual disabilities such as ability to read very simple words, perform tasks involving math and mange interpersonal skills in stressful situations and around strangers. Job Coaching and employment supports should be available for long-term through the Home and Community Wavier. |
| **List any community resources used by the customer or any community resources the customer is interested in using:**Marsha identified an interest in using public transit. Marsha formed a good relationship with her instructor for floral design and she is willing to be a reference for Marsha. Marsha is interested in other programs that will get her out of the house around her peers. |
| **Financial Resources** |
| **Does the customer have any financial support from family or friends (e.g., assistance with housing, food)?** Marsha's grandmother Pearl provides housing and meals. Marsha contributes her SSI towards the home expenses to her grandmother for room and board. The grandmother states the SSI does not cover the expenses necessary to provide for Marsha, therefore she supplements the income. |
| **Does the customer live in public housing?** [ ]  Yes [x]  No **If yes, how will the housing be impacted by earnings from a job?**        |
| **Does the customer manage their own money?** [ ]  Yes [x]  No **If no, who assists the customer with money management?** Grandmother |
| **Does the customer have a bank account?** [x]  Yes [ ]  No  |
| **Use the BPQY provided by the VR counselor when appropriate to answer the questions below.** |
| **Does the customer receive social security benefits?  [ ]  No [x]  Yes If yes, complete the following:****Benefits receiving:**  [x]  Supplemental Security Income [ ]  Social Security Disability Insurance [ ]  Social Security Retirement [ ]  Childhood Disability Beneficiary/Disabled Adult Child [ ]  Disabled Widow/Widower  |
| **Representative Payee:** [ ]  No [x]  Yes, list name:Pearl Smith, grandmother |
| **Does customer participate in any of the Social Security Administration work incentives?** [x]  No [ ]  Yes, describe details of the SSA work incentives:      For more information, refer to [Social Security Administration Work Incentives](https://www.ssa.gov/disabilityresearch/workincentives.htm).  |
| **Home and Community Based Service Waiver Information** |
| **Does the customer receive one of the following HCBS Waivers?**  [x]  Yes [ ]  No If yes, complete the following: [x]  HCS [ ] CLASS [ ] TxHmL [ ] DBMD [ ] YES [ ] STAR+PLUS Waiver [ ]  Medically Dependent Children’s Waiver under STAR Kids**Name and Contact Information for Service Coordinator/Case Manager:** Randy Miller**Name and Contact Information for Waiver Provider:** Bluebonnet TrailsFor more information, refer to [Home and Community Based Services Information](https://www.hhs.texas.gov/doing-business-hhs/provider-portals/long-term-care-providers/resources/home-community-based-services-hcbs).  |
| **Transportation**  |
| **Describe the customer’s options to travel to and from work (e.g., family, Uber, biking, etc.):** Grandmother currently provides the transportation, however, during the Home and Community Exploration activities, I rode the bus with Marsha and feel like she could ride the bus on routine routes to and from work and other locations. Since Marsha has the HCS wavier as part of her long-term support the wavier can provide support related to transportation if that is included in her HCS wavier service plan. |
| **Describe any assistance the customer will need traveling to and from work:** Until such time the grandmother is comfortable with Marsha traveling via the bus and Marsha can demonstrate riding the bus safely without supervision, the grandmother will have to transport to and from work. |
| **Other Pertinent Information**  |
| **Describe any other pertinent information that could impact employment such as criminal history, substance use, etc.** Marsha has no known criminal history or history using drug or alcohol. |
| **Education and Learning Style** |
| **List the customer’s highest educational credential(s):** Marsha graduated high school after the completion of an 18-21 year old program at Cedar Park. |
| **List vocational, technical and/or academic (college) training** (e.g., HVAC, bachelor’s degree) | **Completion Date(s)** | **Skills and/or credentials gained** |
|       |       |       |
| **Would the customer benefit from any other educational experiences to achieve their job(s) of interest?** Marsha is currently taking a class on floral design at the Austin Community College (ACC)- Floral Design I: Principles of Floral Design. Marsha states she is doing well in the class and would like to take the other classes in the Floral Design Series. ACC currently offers Continuing Education Floral Design Certificate. The programs states: “Our program is comprehensive and introduces/prepares students to enter the floral industry. However, our students range from the hobbyist to those looking to start a new career.”  |
| **Based on your observation, how would you describe the customer’s preferred learning style (e.g., lead by example, written instruction)?** Marsha learns best by observation and by verbal discussion. Marsha does not read well or perform math well and she is not able to manage her money. She can recognize simple words, use picture cards or applications that cue her when learning new tasks. She does best with routine tasks, but is very creative in her thinking and completion of tasks. Marsha will need job skills training to learn her job initially and will need job coaching to follow her to ensure she continues to meet an employer's expectations. She also need to make sure strategies are put into place to manage any anxiety. Natural supports in her daily work routine will be key to her success. |
| **Career Exploration and Work Skills Assessment** |
| **Work and Volunteer History** |
| [ ]  NA-No past work experience to report  |
|  [ ]  Volunteer [ ]  Paid work [x]  School program [ ]  Internship [ ]  Apprenticeship [ ]  Other:       |
| **Name of employer or worksite:** Elementary School Classroom  |  |
| **Position title:** Teacher Assistant | **Start Date:** January 2018  | **End date:** April 2018 |
| **Describe the customer’s transferable skills, likes, and dislikes:** Marsha with a job coach, assisted a classroom teacher of pre-kinder. Marsha assists in completing craft projects with the students; setting up and cleaning classroom activity stations; and completing tasks like making copies, preparing materials for activities. Overall Marsha was comfortable working with the students and her limited reading ability did not interfere with her completion of task. Marsha did require supervision for safety and training to learn new tasks. At the completion of the work experience Marsha stated she did not like the responsibility of others, but did enjoy being creative when working with the students. |
|  [x]  Volunteer [ ]  Paid work [ ]  School program [ ]  Internship [ ]  Apprenticeship [ ]  Other:       |
| **Name of employer or worksite:** Austin Creative Reuse  |  |
| **Position title:** Stocker | **Start Date:** September 2019  | **End date:** December 2019 |
| **Describe the customer’s transferable skills, likes, and dislikes:** Marsha sorted through boxes of donated craft supplies. She determined if the material could be reused or if they were trash. When material could be reused, they were packaged with similar items so they could be used for future crafts. The items were then sold or donated. Marsha enjoyed working with the donated crafts, but sometimes required redirection that she was there to work not to complete craft project. She received compliments on her ability to converse with others in structured social settings. Towards the end of the work experience, Marsha did not require a school job coach as she was able to take all redirection from her natural supports at the site. |
|  [ ]  Volunteer [ ]  Paid work [ ]  School program [ ]  Internship [ ]  Apprenticeship [ ]  Other:       |
| **Name of employer or worksite:**        |  |
| **Position title:**       | **Start Date:**        | **End date:**       |
| **Describe the customer’s transferable skills, likes, and dislikes:**       |
| **Career Exploration**  |
| **List the career exploration activities conducted with the customer (e.g., watched video on being a baker, completed My Next Move interest profile, researched job postings for baker, reviewed labor market for baker, etc.)** Marsha completed several interest finders, watch videos, and reviewed My Next move summary of positions, looked for open positions realted to interests |
| **List the vocational fields or industries explored with the customer:** Customer service, retail |
| **Is the customer interested in exploring self-employment options?** **[ ]** Yes**[x]** No |
| **List the types of jobs that interest the customer:** Merchandising Associate-Plant services, entry level floral designer, and gardener |
| **What does the customer like about those types of jobs?** Being creative, around people |
| **List six job tasks the customer would like to do:**  |
| **1.** Arrange flowers  | **2.** stock items  | **3.** set up arrangements at events  |
| **4.** locate orders of plants  | **5.** water plants  | **6.** make decorative displays  |
| **Describe any job task(s) or job interest(s) the customer does not want to pursue:** does not want to manage money or use a cash registers |
| **Customer’s preferred employment conditions (e.g., location, hours, obligations, etc.)?** Wants to work 20 hours per week, have supportive work environment, prefers to work between 1pm and 6pm so she can attend classes at Independent Living Center and ACC class. Will need a business that will allow a Job Skills Trainer. Will also need a work environment that will allow use of job aids. Employment needs to be on bus route. |
| **Work Skills Assessment**  (For more than 3 settings, attach another VR1630)   |
| [ ]  NA an Environmental Work Assessment was completed |
| **Work Skills Assessment, Work Setting 1** |
| **Assessment Activities****:** [x]  Informational interview [x]  Worksite tour [x]  Customer completed work tasks [x]  Customer observed other employees performing job of interest [ ]  Other, describe:       |
| **Business Name:** HEB Floral Department |
| **Business Location:** 2801 E Whitestone Blvd, Cedar Park |
| **Which interests brought the customer to this particular work setting?** work with flowers |
| **Describe information obtained through any informational interviews or observations:** Marsha learned about the prepare bouquets they make available for sale. She learned the different type of arrangements customers can order.  |
| **Describe any work tasks the customer** **performed and the customer’s functional abilities and work tolerance during the assessment:** Marsha was able to prep the flowers by trimming stem and removing the leaves. She then arranged the flowers in a vase trimming the stems so that the flowers were a various heights.  |
| **Describe the customer’s strengths and abilities during the assessment:** Marsha was able to initiate conversation with the florist. When making the arrangements, she demonstrated ability to snip stems and to remove leaves while taking direction from florist. She was patient when had to wait due to customers. Basic knowledge of flowers able to identify rose, daisy, and ivy. Marsha was able to follow the verbal directions.  |
| **Describe the customer’s support needs and challenges during the assessment:** Marsha required cueing to ask the questions prepared prior to the visit. |
| **Describe what the customer liked or disliked about the job tasks and work environment:** Marsha like arranging the flowers. |
| **Work Skills Assessment, Work Setting 2** |
| **Assessment Activities****:** [x]  Informational interview [ ]  Worksite tour [x]  Customer completed work tasks [ ]  Customer observed other employees performing job of interest [ ]  Other, describe:       |
| **Business Name:** Kelly's Landscaping |
| **Business Location:** 123 Garden Street, Cedar Park |
| **Which interests brought the customer to this particular work setting?** Wanted to explore positions that worked with plants. |
| **Describe information obtained through any informational interviews or observations:** Kelly the landscaper explained he walks about 15 miles a day and goes home very dirty each day. |
| **Describe any work tasks the customer** **performed and the customer’s functional abilities and work tolerance during the assessment:** Kelly, the landscaper, described his work tasks as mowing, raking leaves and maintaining his customer’s gardens and flowerbeds. Mark explained that he enjoys planting flowers and vegetables for his customers, but only get requests with the change of seasons, so he has to do other lawn care to keep his business running. Marsha found the leaf blower to be heavy at the end of the 5 minutes. She was also observed to have difficulty pushing the mower |
| **Describe the customer’s strengths and abilities during the assessment:** Marsha push the lawn mower about 25 feet and to blew leaves for about 5 minutes |
| **Describe the customer’s support needs and challenges during the assessment:**Marsha was able to ask questions and keep her interest in the work skill assessment with continued cueing. She appeared to lose interest. Marsha verbalized the job was too physical. |
| **Describe what the customer liked or disliked about the job tasks and work environment:** Marsha verbalized landscaping was hard work and she was not interested in a job like that. |
| **Work Skills Assessment, Work Setting 3**  |
| **Assessment Activities****:** [x]  Informational interview [x]  Worksite tour [ ]  Customer completed work tasks [ ]  Customer observed other employees performing job of interest [ ]  Other, describe:       |
| **Business Name:** Lowes |
| **Business Location:** 10 Lowes Way, Cedar Park |
| **Which interests brought the customer to this particular work setting?** Wanted to explore what a merchandise Associate for Plants did at Lowes |
| **Describe information obtained through any informational interviews or observations:** Kathy, the merchandise associate, explained to Marsha that she work about 20 hours a week. Each day she waters the plants, picks dead leaves off the plants, stock plants and arranges the plants as instructed by the manager. Sometimes she also has to load plants and dirt for customers in their cars. Sometimes she also stocks the inside plants, planters and other gardening supplies. Customers do ask her questions about plants. Lowe's has educated her on plants and the common questions customers ask. |
| **Describe any work tasks the customer** **performed and the customer’s functional abilities and work tolerance during the assessment:**  Marsha asked if she could watch Marsha perform her job and Kathy agreed. To see if Marsha could identify plants and carry out responsibilities of the job, I gave Marsha a list of plants and asked her to gather and prepare as though they were for a customer. I also put a 50 pound bag of rocks and five, 25 pounds of Miracle Grow on the list. Marsha struggled with lifting the 50 pounds of rocks but was able to mange the bags of dirt. Marsha either located the plants or ask associates other than Kathy for assistance. She pulled all dead leaves off the plants and suggested I might want to purchase a couple of pots to transplant the plants into.  |
| **Describe the customer’s strengths and abilities during the assessment:** Marsha demonstrated how to locate items using the Lowe's App. |
| **Describe the customer’s support needs and challenges during the assessment**: Marsha will need to use picture cards to identify plants since she cannot read well, but Marsha also suggested that her Apple Iphone might be able to help her if she can use an app and speak the name of the plant.  |
| **Describe what the customer liked or disliked about the job tasks and work environment:** Marsha stated that that Lowes would teach her about plants. She was concerned about lifting 50 pounds of rocks. I explained that she could ask for assistance and the job description stated she only had to lift 25 pounds and she did that when she lifted the dirt. |
| **Provider’s Assessment** |
| This section allows the provider to list recommendations after the CPA activities are completed. |
| **What do you believe is the best work environment for the customer?** An indoor environment is probably best for Marsha or an environment that is not in direct sun or extreme cold weather. Marsha appeared to enjoy the work environment at both HEB and Lowe's so retail related to flowers or plants is probably a good match to her interest and work tolerances. Marsha will need a supportive work environment for learning and with natural supports. Marsha appeared to respond well during the Work Assessments when given direction.  |
| **In your opinion, what type of help or services will the customer potentially need to successfully prepare for and find competitive integrated employment?**      Marsha will need total assistance in locating employment as she cannot read well and has limited computer skills. Marsha did demonstrate she is able to use an application on her phone when she could speak instead of type spelled out words. Marsha will need interview training and need to be accompanied to any interview.  |
| **Describe any short-term and long-term supports the customer will potentially need to maintain competitive integrated employment (e.g., job skills training, natural supports, extended services):** Once hired, she will need a representative to advocate for her with the employer. Marsha will also need Job Skills Training to learn the job to meet the employer's expectations. Extended long term supports will be needed to monitor Marsha abilities to meet the employer’s expectation and to teach new skills when new tasks added to her responsibilities. |
| **What accommodations might assist the customer with employment (for ideas, see the** [**Job Accommodation Network**](https://askjan.org/index.cfm)**)?** Marsha will benefit from use of applications on her phone to assist with reading content on webpages, emails and other communications. Marsha also will benefit from use of application that will list her job tasks and break new job task down into steps presented with pictures. Will need to also communicate Marsha cannot lift greater than 25 pounds. |
| **Additional comments and concerns (if none, type “None”):** Marsha grandmother Pearl needs to be present at all meetings. |

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| **Provider Signatures** (See VR-SFP 3.11.1 Documentation and Signatures)   |
| **Career Planning Assessment Evaluator** |
| **By signing below, I certify that:*** The above dates and services are accurate; and
* I personally facilitated the assessment, documented the results in this report, and met all outcomes required for payment listed in the VR-SFP and service authorization.
 |
| **Typed or Printed name:** | **Signature:****X** | **Date Signed:** |
| **Select all that apply:**[ ]  UNTWISE Credentialed with ID:       [ ]  VR3490-Waiver Proof Attached [ ]  Transition Educator [ ]  Non-traditional  [ ]  RID/BEI/SLIPI with Number:       or [ ]  proof attached |
| **Director**   |
| **Typed or Printed name:** | **Signature:****X** | **Date Signed:** |
| **Select all that apply:**[ ]  UNTWISE Credentialed with ID:       [ ]  VR3490-Waiver Proof Attached  |
| **VRS Use Only**  |
| Any VR staff member may complete the VRS Use Only section.   If any question below is answered no or if the report or supporting documentation is missing or incomplete, return the invoice to the provider with the VR3460. Follow the instructions in VRSM D-208-3: Incomplete or Inaccurate Invoices.     |
| **Provider Qualifications Verification**  |
| **Career Planning Assessment Evaluator Credential:**   |
| UNTWISE website or attached VR3490 verifies, for the dates of service, the evaluator listed above:  [ ]  maintained or waived the UNTWISE Supported Employment Credential [ ]  did **not** hold a valid UNTWISE Supported Employment Credential |
| **Director Credential:**   |
| UNTWISE website or attached VR3490 verifies, for the dates of service, the director listed above:  [ ]  maintained or waived the UNTWISE Director Credential [ ]  did **not** hold a valid UNTWISE Director Credential |
| **UNTWISE Endorsements:**  |
| UNTWISE website verifies, for the dates of service, the Supported Employment Specialist listed above maintained the following endorsement:  [ ]  None [ ]  Autism [ ]  Brain Injury [ ]  Other, specify:       |
| **Qualifications Related to Deaf Premium:**  |
| Attached documentation verifies, for the dates of service, the Supported Employment Specialist listed above maintained one of the following:   [ ]  Not applicable/no attachment [ ]  BEI [ ]  RID [ ]  SLIPI |
| **Report Verification**   |
| Verified that the form indicates a minimum of 3 hours of Home and Community Exploration and 6 hours of Career Exploration and Work Skills Assessment   | [ ]  Yes [ ]  No |
| Verified that the report is accurate and complete, per form instructions and SFP 4 | [ ]  Yes [ ]  No |
| Verified that the customer received the service  | [ ]  Yes [ ]  No |
| Verified that the service was provided within the dates on the SA | [ ]  Yes [ ]  No |
| Verified that the appropriate fee(s) was invoiced | [ ]  Yes [ ]  No |
| **VR staff name:**  | **Date:**       |