

Purpose

These instructions pertain to what types of information should be included within each subject heading. If a question does not pertain to the customer or provides no value to the contents of the report, you do not have to answer it. The provider is encouraged to include information not addressed in these instructions, if it adds value.

Be factual and state exactly what the customer or the customer's representative said. Do not write your interpretations. Remember that the customer and or the representative will be reviewing the report. Keep the language simple and make bullet points when appropriate.

Section 1: Reason for Referral

Who is the customer?

Why was the customer referred for this assessment?

Section 2: Initial Interview

The interview should take place in the customer's home.

Be sure to enter the names of all persons interviewed. Usually, the customer and the parent or guardian are interviewed. List all other persons interviewed. Often, other persons are siblings, attendants, school personnel, a day habilitation provider, and the current employer or group home manager.

Section 3: Current and Past Medical

Include information about the following medical concerns:

- Current medical issues
- Past medical issues
- Current medical issues or concerns?
- Prescribed medicines
- Name of prescriber
- Length of time on each medication
- Biomedical or homeopathic treatments
- Beliefs of guardian and/or customer about effectiveness of medications

Section 4: Current and Past Therapies

List past and current therapies (that is, occupational therapy, speech therapy, applied behavior analysis, and psychotherapy). State which therapies worked and which did not work.

Section 5: Current Home Life

Answer the following questions:

- With whom does the customer live?
- For how long has the customer lived with this person or persons?
- Are there plans for future living arrangements?
- What level of prompting does the customer need to complete simple tasks such as dressing and feeding himself or herself?
- What is the customer responsible for at home? (This is important. If he or she is not held accountable for chores at home, this might reflect job readiness.)

Section 6: Customer's Form of Communication

- How does the customer best communicate?
- Could this form of communication create a barrier to employment?
- What is the customer's preferred method of communication (that is, does the customer prefer instructions to be written, verbal, or demonstrated?)?

Section 7: Educational History

- Many customers will still be in school. If the customer is in school, ask the counselor for a copy of the current individualized education plan.)
- Were the customer's classes accommodated?
- Could the customer identify what classes were accommodated?
- Did the customer advocate for himself or herself, or did he or she rely on adults?
- Did the customer (or their representative) seek help from the school but did not receive it?
- Does the customer and/ or guardian feel that the customer was effective?
- Where did the customer receive the majority of instruction: regular classroom, inclusion support, resource classroom or self-contained instructional settings?
- Did he or she participate in a vocational class, volunteer, or have paid employment? If so, on or off campus? In what environments and what tasks? Any issues occur?
- Did the school conduct a transition assessment?
- Did the customer have a behavior intervention plan (BIP)? Did the customer have challenging behaviors? What did the behaviors look like? Did the behaviors interfere at school and/or home? Did the customer receive behavioral intervention or social skills intervention from the school?
- If the customer received behavioral intervention or social skill supports services, what types of services were the most effective (that is, did services include provision of a location where the customer could cool down or a social-skill group in their sophomore year?)?
- If the customer graduated, did they graduate with the skills needed to transition into the community?

Section 8: Hobbies and Interests

Answers to the questions below are one way to see if a customer has an interest that is productive or if the interest is an obsession. Interests that are obsessive typically will not be a good work environment. Ask the customer the following questions:

- My favorite thing to think about is
- My favorite thing to talk about is
- My favorite thing to learn about is
- My favorite thing to do is
- My favorite subject in school is or was
- Don't make me

Section 9: Employment Experience

Customer:

- Do you want to work?
- Why do or don't you want to work? ("I don't know" is an acceptable answer.)

Parent:

- Does your child express to you that he or she wants to work?

Section 10: Work Potential

Customer:

- Does the customer seem resistant or willing to work?
- Does the customer make negative or positive comments about their strengths and potential?
- Can the customer name some of their strengths or struggles?

Parent:

- Does the parent see potential in the customer? Explain.
- Does the parent seem resistant to services or make negative statements about the potential success of their child, or are they positive and supportive?

Additional Comments or Observations (not required but encouraged)

State exactly what was said. Do not interpret what you think the customer meant.

- What was the demeanor of the customer?
- Describe the customer's appearance.
- Describe the customer's behavior.
- Did the customer communicate freely, or was the guardian answering most or all of the questions?
- What was the condition of the home at the time of the interview?
- If the customer has his or her own room, what was the state of the room?