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IPS Facebook Page:

<https://www.facebook.com/KentuckyIPS/>

YouTube:

[https://www.youtube.com/channel/UC6ae3ytquQt\\_0qSC5qOfArg](https://www.youtube.com/channel/UC6ae3ytquQt_0qSC5qOfArg)

OVR:

<https://kcc.ky.gov/Vocational-Rehabilitation/Pages/Kentucky-Office-of-Vocational-Rehabilitation.aspx>

Supported Employment Training Project:

<https://www.hdi.uky.edu/setp>

Department for Behavioral Health, Developmental and Intellectual Disabilities:

<https://dbhdid.ky.gov/dbh/>



The IPS Toolkit has been developed to provide KY IPS providers access to resources that are frequently used. While the toolkit is not all-inclusive, we hope the resources will be of use to you in this handy format. For more information, you can always visit the IPS International Learning Community website: <http://www.ipsworks.org>. The toolkit will be updated twice per year.

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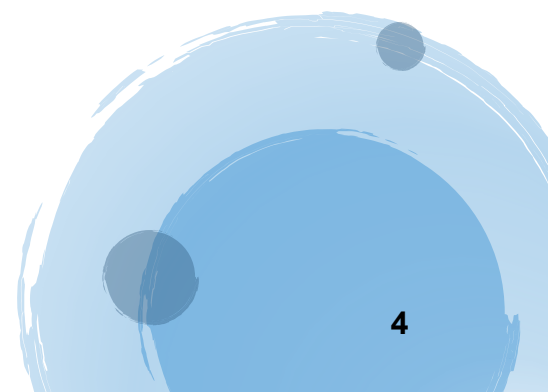
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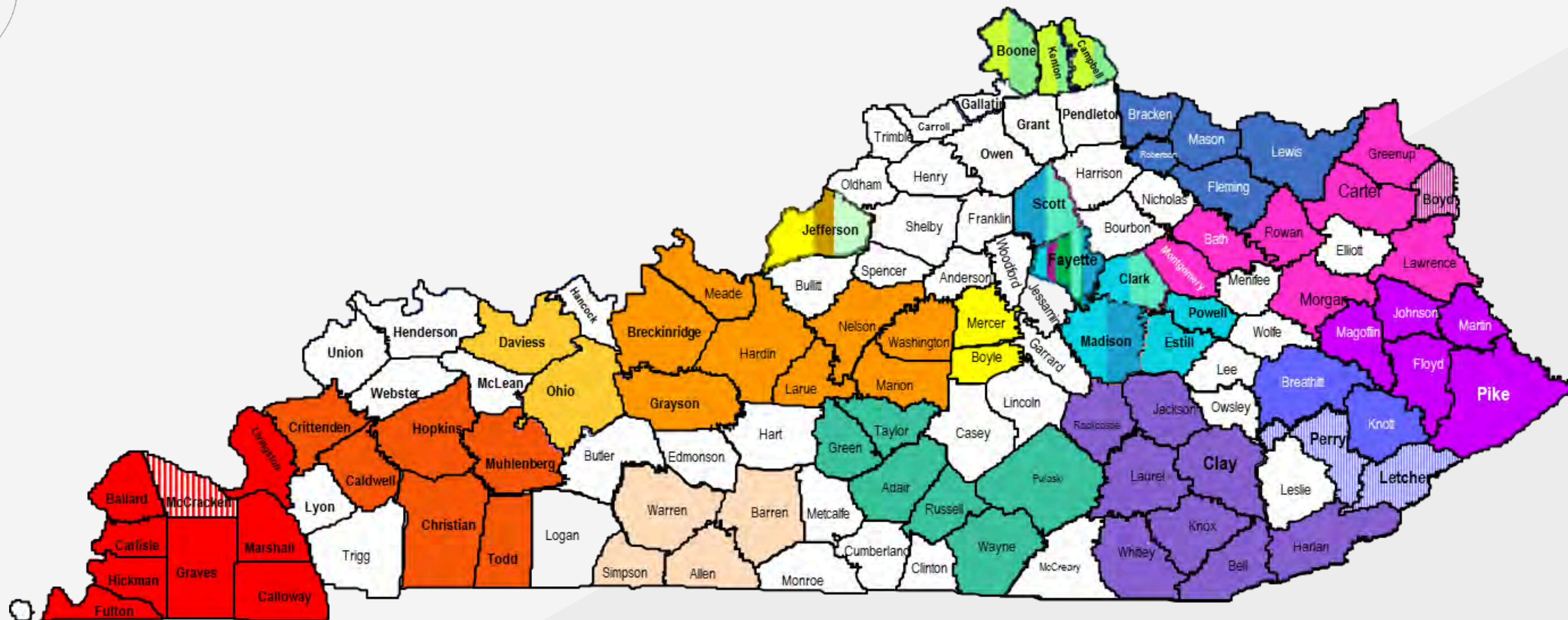


# General Information





# Kentucky IPS Supported Employment November 2024



- |                                                                              |                                                            |                                                                             |                                                                                   |
|------------------------------------------------------------------------------|------------------------------------------------------------|-----------------------------------------------------------------------------|-----------------------------------------------------------------------------------|
| <span style="color: red;">■</span> Four Rivers                               | <span style="color: gold;">■</span> Seven Counties         | <span style="color: teal;">■</span> Adanta                                  | <span style="color: purple;">■</span> Cumberland River                            |
| <span style="color: red; border: 1px dashed red;">■</span> IHOPE/Four Rivers | <span style="color: yellow;">■</span> Bridgehaven          | <span style="color: lightgreen;">■</span> Independence Place                | <span style="color: magenta;">■</span> Mt. Comp                                   |
| <span style="color: orange;">■</span> Pennyroyal                             | <span style="color: lightyellow;">■</span> Wellspring      | <span style="color: cyan;">■</span> New Vista                               | <span style="color: magenta; border: 1px dashed magenta;">■</span> Pathways Youth |
| <span style="color: yellow;">■</span> River Valley                           | <span style="color: limegreen;">■</span> North Key         | <span style="color: blue;">■</span> Build Inclusion                         | <span style="color: purple;">■</span> Bluegrass Career Services                   |
| <span style="color: peachpuff;">■</span> Lifeskills                          | <span style="color: green;">■</span> Mental Health America | <span style="color: blue;">■</span> KY River                                |                                                                                   |
| <span style="color: orange;">■</span> Communicare                            | <span style="color: green;">■</span> Voices of Hope        | <span style="color: blue; border: 1px dashed blue;">■</span> Ky River Youth |                                                                                   |
|                                                                              |                                                            | <span style="color: blue;">■</span> Comprehend                              |                                                                                   |

**Information Sheet\***  
**Employment Supports for Clients with**  
**Co-Occurring Mental Illness and Substance Abuse**

The Myths	The Facts
Work is too stressful for clients with mental illness and co-occurring substance abuse.	As with other members of our society, work improves self-esteem, adds a sense of purpose, and contributes towards recovery in positive ways for many people with dual disorders.
Clients with mental illness and co-occurring substance abuse benefit from extensive pre-vocational assessments and work readiness programs before further employment options are pursued.	The best predictors of work success for persons with mental illness and co-occurring substance abuse are a client's: 1) expressed interest in working, and 2) previous employment history. Substance abuse is not a consistent predictor of work success or failure.
Clients with mental illness and co-occurring substance abuse are more successful in sheltered vocational programs where they can be monitored and have their problems addressed by program staff.	With appropriate supports when needed, clients report greater job satisfaction and success in competitive employment of their own choosing.
Clients with mental illness and co-occurring substance abuse will do poorly no matter what.	The majority of clients with mental illness and co-occurring substance abuse will get into recovery when offered high-quality integrated dual diagnosis treatment.
Clients who are able to recover from a substance use disorder are always at significant risk for relapse.	Relapse of a substance use disorder is always a possibility, but employment may protect clients from relapse. Employment is associated with continued recovery, and relapse is associated with unemployment, housing instability, and loss of social supports.
Clients with substance abuse problems don't want to work.	Like other people, many clients with substance abuse are interested in working and find work to be a good reason to cut back or stop their substance abuse.
Clients who abuse substances lack good work skills.	Many clients with substance abuse have a variety of interests, employment histories, and job skills that are valuable on the job.
Whenever a urine drug screen is positive, the client has been using recently.	Different drugs stay in the body for different periods of time. Additionally, substances can build up in the body if used regularly. --Alcohol is usually excreted at the speed of about 1 hour for each drink. --Cocaine is excreted pretty rapidly - usually within a day. --Cannabis is excreted more slowly because THC, the active form of the substance, is stored in body fat and slowly excreted. Regular, heavy cannabis users can have positive urines for 6 weeks after becoming abstinent. Depending on amount and regularity of cannabis use, users can have positive urines for as brief as a few hours to 6 weeks.
A positive drug screen indicates recent use and a negative screen indicates non-use.	The truth is more complicated. Different drugs stay in the body and appear in the urine for different time intervals. Some tests include only a few drugs and omit all others. Some tests are much more accurate (and expensive) than others. Talk to someone at your local laboratory to understand the limits of testing.
Clients who relapse with substance abuse are poor candidates for supported employment.	For many clients with substance abuse, relapse is part of the long-term course of recovery. Rates of employment for clients with dual disorders are similar to the rates for clients with a single disorder of mental illness. Supported employment may be part of a client's recovery process.

\*Prepared by the Dartmouth Evidence-Based Practices Center

# IPS Supported Employment Practice & Principles

## Overview of IPS Supported Employment

IPS supported employment helps people living with behavioral health conditions work at regular jobs of their choosing. Although variations of supported employment exist, IPS (Individual Placement and Support) refers to the evidence-based practice of supported employment. Mainstream education and technical training are included as ways to advance career paths.

## Characteristics of IPS Supported Employment

- \* It is an evidence-based practice
- \* Practitioners focus on each person's strengths
- \* Work promotes recovery and wellness
- \* Practitioners work in collaboration with state vocational rehabilitation counselors
- \* IPS uses a multidisciplinary team approach
- \* Services are individualized and last as long as the person needs and wants them
- \* The IPS approach changes the way mental health services are delivered

## Practice Principles of IPS Supported Employment

1. Focus on Competitive Employment: *Agencies providing IPS services are committed to competitive employment as an attainable goal for people with behavioral health conditions seeking employment. Mainstream education and specialized training may enhance career paths.*
2. Eligibility Based on Client Choice: *People are not excluded on the basis of readiness, diagnoses, symptoms, substance use history, psychiatric hospitalizations, homelessness, level of disability, or legal system involvement.*
3. Integration of Rehabilitation and Mental Health Services: *IPS programs are closely integrated with mental health treatment teams.*
4. Attention to Worker Preferences: *Services are based on each person's preferences and choices, rather than providers' judgments.*
5. Personalized Benefits Counseling: *Employment specialists help people obtain personalized, understandable, and accurate information about their Social Security, Medicaid, and other government entitlements.*
6. Rapid Job Search: *IPS programs use a rapid job search approach to help job seekers obtain jobs directly, rather than providing lengthy pre-employment assessment, training, and counseling. If further education is part of their plan, IPS specialists assist in these activities as needed.*
7. Systematic Job Development: *Employment specialists systematically visit employers, who are selected based on job seeker preferences, to learn about their business needs and hiring preferences.*
8. Time-Unlimited and Individualized Support: *Job supports are individualized and continue for as long as each worker wants and needs the support.*

## Unique Features of the IPS program

- Program serves clients with severe mental illness and co-occurring disorders (mental health and substance use disorders).
- The caseload size is up to 20 clients to allow the employment specialist to provide intense services, participate in the treatment team, meet with the VR counselor, and job development.
- Integration with the treatment team
- Employment specialist spend at least 65% of their time out in the community. The rationale here is that there is a direct co-relation between community time and the number of job starts.
- Employment Specialist complete 6 contacts a week with the business' hiring authority. Rapid job search helps clients get jobs fast.
- The fidelity scale is used in order to provide the program with a roadmap to successful services. Two days are devoted to reviewing the program.
- "Step down" supports
- Scheduled monthly meetings with the OVR counselor.

## Snapshot of Kentucky IPS

Kentucky was the 12th state to join the Dartmouth Johnson and Johnson initiative. We started with the program in 2010 with four sites, Four Rivers, North Key, Communicare, and Comprehend. Now we have spread to all 14 Community Mental Health Centers throughout the state, and have recently added five new providers. Currently the sites receive performance based funding from OVR. Additionally, the agencies receive block grant dollars from the state in order to assist them in providing long term supports.



## **Making the Case for IPS Supported Employment**

### ***For most people with a mental illness, employment is part of their recovery.***

Most people with severe mental illness want to work. Approximately 2 of every 3 people with mental illness are interested in competitive employment,<sup>1-8</sup> but less than 15% are employed.<sup>9-12,</sup>

### ***Individual Placement and Support (IPS) supported employment is evidence-based.***

IPS helps people join the competitive labor market.<sup>13,14</sup> IPS is three times more effective than other vocational approaches in helping people with mental illness to work competitively.<sup>15-18</sup> IPS has been found effective for numerous populations in which it has been tried, including people with many different diagnoses, educational levels, and prior work histories;<sup>19</sup> long-term Social Security beneficiaries,<sup>20</sup> young adults,<sup>21,22</sup> older adults,<sup>23</sup> veterans with post-traumatic stress disorder<sup>24</sup> or spinal cord injury;<sup>25</sup> and people with co-occurring mental illness and substance use disorders.<sup>26</sup> To date, we have not discovered a subgroup for which IPS has not been effective.

### ***IPS is cost-effective.***

Severe mental illness is a leading contributor to the global burden of disease<sup>27,28</sup> and constitutes the largest and fastest growing group of beneficiaries in Social Security disability programs.<sup>29,30</sup> Once on the disability rolls, less than 1% of beneficiaries per year move off of benefits to return to work.<sup>31-33</sup> By helping people with mental illness gain employment, especially young adults experiencing early psychosis, IPS can help forestall entry into the disability system and reduce Social Security expenditures.<sup>34-38</sup>

IPS is an excellent investment, with an annual cost of \$5500 per client in 2012 dollars.<sup>39,40</sup> Most clients enrolled in IPS receive more mental health services than IPS services.<sup>41-43</sup> IPS is cost-effective over the long term when mental health treatment costs are considered. Studies have found a reduction in community mental health treatment costs for people receiving supported employment services,<sup>44-48</sup> and a reduction in psychiatric hospitalization days and emergency room usage by clients who receive supported employment.<sup>49-51</sup> Service agencies converting their day treatment programs to IPS have reduced service costs by 29%.<sup>45</sup>

Over the long term, clients who return to work produce huge long-term savings in mental health treatment costs. A 10-year follow-up study of clients with co-occurring severe mental illness and substance abuse disorder found an average annual savings of over \$16,000 per client in mental health treatment costs for steady workers, compared to clients who remained out of the labor market.<sup>52</sup>

### ***IPS improves long-term well-being.***

People who obtain competitive employment through IPS have increased income, improved self-esteem, improved quality of life, and reduced symptoms.<sup>49,53-55</sup> Approximately 40% of clients who obtain a job with help from IPS become steady workers<sup>56</sup> and remain competitively employed a decade later.<sup>57,58</sup>

### ***IPS programs have a high rate of successful implementation and sustainability over time.***

The IPS model is a common sense, practical intervention that appeals to clinicians, clients, and the general public.<sup>59,60</sup> Quality of IPS implementation is measured using a

standardized fidelity scale.<sup>61</sup> Programs ordinarily achieve high fidelity implementation within one year's time.<sup>62</sup> High fidelity IPS programs have excellent competitive employment outcomes.<sup>63,64</sup> IPS is relatively easy to implement with high fidelity, as shown in numerous implementation projects.<sup>20,42,62,65</sup> With adequate funding, committed leadership, and fidelity monitoring,<sup>66</sup> multi-site projects have successfully implemented IPS in over 80% of programs adopting this approach. IPS has been successfully implemented in both urban and rural communities.<sup>67,68</sup> Once implemented, most IPS programs continue indefinitely to offer quality services if adequate infrastructure remains in place. One study found 84% of 165 IPS programs implemented over the last decade were still providing services in 2012.<sup>69</sup>

***Most Americans with severe mental illness do not have access to IPS.***

Despite the benefits of IPS, access to IPS is limited or unavailable in many communities. First the good news: the International Learning Community has grown to 138 programs in 14 states with two new international partners (Italy and the Netherlands).<sup>69</sup> But only 2.1% of clients with severe mental illness in the U.S. public mental health system received supported employment in 2009.<sup>70</sup> Similarly, during 2007, <1% of Medicaid patients with schizophrenia had an identifiable claim for supported employment.<sup>71</sup> Wider access to IPS would benefit people with severe mental illness, their families, taxpayers, and the general public.

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# IPS Supported Employment Program Implementation Guide

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Revised 2015



# Partnerships

## Helping Individuals Consider Employment

### Tips for Mental Health Practitioners

Attached is a worksheet designed to help you and your clients with discussions about employment. Before you begin, please consider these strategies that other mental health practitioners have found to be helpful:

- Try not to encourage the person in one direction or another. In other words, do not cheerlead the person to get a job or advise the person to slow down.
- Be curious. Learn all you can about the person's feelings and thoughts about work. For example, if someone says she wants to work so that she can spend more time with others, ask "What else?"
- If someone says that they know how their benefits would be affected by a return to work, ask where they got their information. Make sure that they are not relying on misinformation. Offer a meeting with a benefits planner.
- When working on the rating scales for confidence about working and importance of working, ask the person about the number that he chose. For example, "Why did you select a 5?" or "Why a 3 and not a 1?"
- Suggest a next step. Examples of ways that people could learn more about working are below.
  - ⇒ Schedule a meeting with an employment specialist to learn about how s/he helps people with jobs.
  - ⇒ Schedule a meeting with a benefits planner.
  - ⇒ Plan to have more discussions about work.
  - ⇒ Set up a meeting with another person who has gone back to work. Ask that person to share how she overcame barriers to work and why working is important to her.
  - ⇒ Make a referral to supported employment (IPS)
  - ⇒ Help with identified barriers to work, for example, help find options for childcare

Tips for talking about work on an ongoing basis:

- Ask about job preferences. What is your dream job? What type of job would you like next?
- Ask about the person's work history. What was your favorite job? Why? Least favorite? Who was your favorite boss? Why?

- Ask if the person knows others who are working? What do they do?
- Ask the person to describe their life 5 years from now. Where will he be living? What relationships would he like to have in his life? How will he be spending his days?
- Repeat the attached worksheet from time to time (for instance, in a few months). With your client, compare the old worksheet to the new one. Did the answers change? Why?

## Role of Mental Health Practitioners

- **Help people think about work: Share the Philosophy that “Believe People Can Work”**
- **Introduce clients to the Employment Specialist**
- **Share input in to the Person Centered Employment Plan**
- **Help connect Employment Specialist with person’s support system**
- **Share job ideas, job leads**
- **Help provide encouragement-hopeful message-while looking for work, if lose a job**
- **Provide job supports-coping strategies, conversation starters**
- **Help with outreach/engagement**
- **Anything to help the person with work**

## IPS Peer Specialists

Peer specialist refers to members of the IPS unit who have similar life experiences to people who receive IPS services. The duties of peer specialists vary by program location. What is common among peer specialists is that they share how they overcame obstacles to achieve their own career goals, and how they continue to move forward in their own recovery. IPS specialists (the practitioners responsible for helping people with education, finding and keeping jobs), and peer specialists have similar duties. But even though they may sometimes work on the same tasks, they do their work from different perspectives. Some IPS specialists also have lived experiences similar to those served and share the strategies that helped them.

“Peers break down barriers. When consumers hear my story (where I was and what happened, and where I am now) we have common ground so the person can gain strength and hope that they too can achieve their goals and dreams. Working can be stressful in early recovery – we can discuss any concerns and obstacles in their way and how we can get through them together. Sometimes, just another person on their side to listen to them and say, ‘We will get through this’ can motivate and bring problems into perspective. I, as a peer specialist, am just another person within their support system hoping to see them succeed.”

Diana McSheffrey, IPS peer specialist

This document includes examples of IPS peer specialists’ job duties, examples of a day in the working life of an IPS peer specialist, explanations of how IPS peers can be effective, and two sample job descriptions.



**Importance of the Individualized Plan for Employment with OVR and how this relates to the client employment goal:**

After an individual has been determined eligible for services, the vocational rehabilitation counselor will talk to the individual (now consumer) about job interests and help her or him decide on an employment goal. This may require the vocational rehabilitation counselor to further assess the individual's strengths, abilities, limitations and interests to help ensure an appropriate vocational goal. The goal of this planning process is the development of an Individualized Plan for Employment (IPE). The IPE will be a 'roadmap' for the consumer to follow to reach her or his vocational goal. It is a plan for services leading to an employment outcome. The individual has the option of developing and writing all or part of the IPE with the assistance of the counselor, developing the IPE alone without assistance, or developing it with the assistance of representative of her or his choice. The plan must be executed on the agency approved form.

The following elements must be included in the IPE, as appropriate:

- the specific employment outcome (vocational goal) in the most integrated setting based on the informed choice of the individual;
- the date the employment plan is estimated to be completed;
- the specific services to be provided in order to achieve the employment outcome;
- who will provide each service;
- the beginning date for each service;
- if supported employment services are to be provided, the provider of the extended on-going support services;
- the criteria for evaluating progress and success;
- the responsibilities of the consumer;
- the responsibilities of the Kentucky Office of Vocational Rehabilitation.

The IPE must be mutually agreed upon, as must any necessary amendments to it, and must be signed jointly by the consumer and by the Office of Vocational Rehabilitation counselor and, as appropriate, by a parent, guardian, or other representative. The IPE is reviewed with the consumer at least annually.

A copy of the IPE, including any amendments and the intended employment outcome, is provided to the individual and/or, as appropriate, the parent, guardian, or other representative. It must be provided in the individual's native language or mode of communication if necessary for the full participation of the individual with a disability.



# Information on Evidence-based Supported Employment for Vocational Rehabilitation Counselors

Evidence-based supported employment (SE) is a well-researched and field-tested approach to helping people who are recovering from mental illness. Supported employment works well in urban and rural communities. Regardless of the economy, people with mental illness are more likely to find jobs if helped by a supported employment program than any other type of vocational service.



**Better Outcomes:**  
**Research has demonstrated that on average 58% of people with severe mental illness become employed if they have access to evidence-based supported employment. Only 24% on average find work if they receive services from other types of vocational programs.**

## Motivation is an important predictor of success for individuals with severe mental illness.

In many SE programs, Vocational Rehabilitation (VR) services are provided for the large majority of clients. VR counselors working with high fidelity SE programs report that the extra assistance provided by SE programs has been especially helpful to some people, for example, people who have psychotic symptoms or substance abuse problems. In this way, VR has been able to work with people that they may not have served in the past.

## Mental health and vocational services are integrated.

It is important for all of the people working with an individual client to share information and provide a consistent message to the person. Therefore, the "treatment team" meets weekly and may include a case manager, counselor, psychiatrist, employment specialist, or others. When VR counselors attend these meetings, they share their expertise, keep up-to-date on clients and become an integral part of the treatment team. VR counselors are encouraged to regularly attend meetings.

## Benefits planning is comprehensive and ongoing.

A person with comprehensive training provides clients with accurate information about work incentives and the impact of earned income upon all sources of income. Clients are offered ongoing help with benefits and asset development as their goals and jobs change over time.

## Client preferences are important.

Client preferences may be related to the type of work, job location, hours of work, disclosure

of disability, or other issues. Many people with severe mental illness choose to start with a part-time job and increase their work hours over time.

## Competitive employment is the goal.

Supported employment focuses on regular jobs in the community, not jobs created for people with disabilities. All jobs pay at least minimum wage.

## The job search is rapid.

Clients are not asked to participate in vocational evaluation, work adjustment programs or pre-vocational activities. Instead, the SE program helps clients begin a job search within a few weeks of the first appointment. VR counselors and SE programs work together to develop strategies that will help VR determine eligibility as quickly as possible.

## Follow-along supports are continual.

The SE program meets with clients frequently to help them succeed in their jobs and move ahead in the world of work. Although VR may close cases after 90 days, the SE program continues to provide ongoing follow-along services with help from case managers and counselors as long as the client desires.

## Clients are supported with job changes.

SE programs and VR counselors honor client choice with regard to leaving jobs, even if the person has a poor job history or other barriers to employment. If job loss occurs, the SE team works to help the person find another job. Whenever possible, VR assists the SE team with more than one job.

**Evidence-based supported employment is currently based on 15 randomized controlled studies and a specific fidelity scale to ensure program standards. This form of supported employment differs from the federal definition of supported employment that was originally created for people with developmental disabilities. Please see the resources noted at the bottom of this poster for more information.**



### For more information:

Dartmouth Psychiatric Research Center  
<http://dms.dartmouth.edu/prc/>

Deborah R. Becker and Robert E. Drake, *A Working Life for People with Severe Mental Illness.*

New York: Oxford University Press, Inc., 2003.

SAMHSA Supported Employment Toolkit

<http://mentalhealth.samhsa.gov/cmhs/communitysupport/toolkits/employment/default.asp>

**TIP 1: Normal Development**

Young adults are at a stage of developing self-identity. Young people want to try different experiences and may fluctuate in their desire to work or go to school. Employment/education specialists help them explore both options and continue to engage young people even during periods of uncertainty. Practitioners do not confuse ambivalence and developing an identity with lack of motivation. Peers with work or school experiences can help engage other young adults who are unsure about their goals.

**TIP 2: Strength-based Services**

Young adults typically see themselves as healthy and invincible rather than disabled. They are more likely to engage in services that focus on their strengths and opportunities rather than on diagnosis or disability. Employment/education specialists help people to consider short-term and long-term career goals. For some people, the focus is on educational goals that match their career goals. Employment/education specialists help young people explore career opportunities by asking questions such as:

- ◇ What would you like to be doing in two to three years?
- ◇ What is your dream job?
- ◇ Do you know of anyone that has gone to college, attended training programs or taken adult education courses?
- ◇ What are some of your interests and what do you enjoy?
- ◇ What are the things that we are working on now that you find helpful?
- ◇ What else could we be doing in that direction?

**TIP 3: Family Involvement**

With the young adult's permission, invite family members to some employment/education meetings. Family is defined by the young adult and can include friends, partners or other supporters. Family members contribute information about the individual's strengths, skills, hobbies and past education. Friends often have a strong influence in the person's life and share information from a young person's perspective. Ask the young adult, "Is there anyone else who has given you helpful ideas? Would you like to invite that person to a meeting?" Educate the family about career development. For example, explain that it is normal for young people to try different jobs. Some jobs may be short-term or brief, but are still learning experiences. Educate the family about how to support the young adult in his/her work and school experiences. Talk with the family about whether this approach challenges the family norms and culture.

**TIP 4: Community-based Services**

Young adults often shun traditional clinical settings. Create an environment that is more conducive to a younger population by displaying posters and materials that are marketed towards youth and equipping the space with computers. Consider creating separate waiting rooms for young people. Remember that community-based services are often more appealing to young adults than meeting in a clinic. Ask each person where she likes to spend time and offer to meet the young person there.

**TIP 5: Engagement and Use of Technology**

Many young adults prefer to communicate through texts, emails and instant messages rather than by phone. In addition, many job applications require online access. Social media, such as LinkedIn, provides employment connections that aid job searches. Review and revise agency policies about communicating with technology and ensure that computers used by the IPS program have access to job seeking sites.

**TIP 6: Benefits Counseling**

Securing disability benefits can lead to a path of long-term mental health treatment and poverty. Employment/education specialists help young adults consider jobs and careers as an alternative to disability benefits. Help young people consider the advantages and disadvantages of applying for disability benefits. Offer meetings with peers who can explain why they chose employment. Ultimately, honor each person's choice and continue to offer assistance with school and work.

**TIP 7: Work Exploration**

Young adults often have little or no employment history. Exploring the world of work through summer jobs, internships, AmeriCorps and additional schooling or certification programs is normal for young people. When young adults prefer help with permanent, competitive jobs, employment/education specialists follow their lead and do not require or encourage non-competitive positions. When a person expresses interest in an internship, the employment/education specialist helps to

explore available positions and focuses on learning whether the internship will help the person gain skills and experience related to her career goals. *Note: Internships are different than volunteer jobs available to any community member.*

**TIP 8: Language Matters**

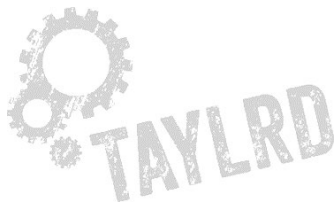
Young adults are more likely to avoid programs that use disability-related language. For example, names such as office for student disability services or rehabilitation services are sometimes discouraging. When connecting young people with these services, prepare the young person for the language and

perhaps modify the process. For example, a vocational rehabilitation counselor reports, "I don't require that young adults go through Vocational Rehabilitation's group orientation. Instead, I meet with each person individually to introduce the services that we provide. I attend the mental health treatment team meetings and I spend time getting to know each person so I can learn what their strengths and interests are in order to make a good job match." — *Molly Joubert, Vocational Rehabilitation Counselor, Oregon*

[www.ipsworks.org](http://www.ipsworks.org)

\* IPS is an acronym for Individual Placement and Support, the evidence-based approach to supported employment for people with mental health challenges.

This document was developed by members of the IPS Learning Community, July 2015.



<b>FOUR RIVERS (Region 1)</b> <b>Drop-in Center Site Manager:</b> vacant <b>Youth Leadership Coordinator:</b> Kalmece Wilson - <a href="mailto:ktwilson@4rbh.org">ktwilson@4rbh.org</a> <b>Transition Age Youth (TAY) Coordinator:</b> Rebecca Downey – <a href="mailto:rdowney@4rbh.org">rdowney@4rbh.org</a> or 270.816.5390 <b>iHOPE Lead:</b> Amanda McIntosh: <a href="mailto:amcintosh@4rbh.org">amcintosh@4rbh.org</a> or 270.442.7121 <b>Youth Substance Use Treatment Coordinator:</b> Erin Northington – <a href="mailto:efinke@4rbh.org">efinke@4rbh.org</a> or 270.442.7121		
Agency	Location	Contact
Four Rivers (McCracken County) Opened January 2018	The Zone 415 Broadway Paducah KY 42003	Vacant Site Manager – The Zone Four Rivers Behavioral Health 270.444.3608

<b>River Valley Behavioral Health (Region 3)</b> <b>Drop-in Center Site Manager:</b> Rachel Heath - <a href="mailto:heath-rachel@rvbh.com">heath-rachel@rvbh.com</a> <b>Youth Leadership Coordinator:</b> Jaycee Simpson - <a href="mailto:simpson-jaycee@rvbh.com">simpson-jaycee@rvbh.com</a> <b>TAY Coordinator:</b> Mattea Meadows - <a href="mailto:meadows-mattea@rvbh.com">meadows-mattea@rvbh.com</a> <b>FEP Lead (First Episode Psychosis/FEP) – No iHOPE Program:</b> Mary Kay Lamb - <a href="mailto:lamb-marykay@rvbh.com">lamb-marykay@rvbh.com</a> <b>Youth Substance Use Treatment Coordinator:</b> Alexa Bellamy – <a href="mailto:bellamy-alexa@rvbh.com">bellamy-alexa@rvbh.com</a>		
Agency	Location	Contact
River Valley Behavioral Health (Henderson County) Opened October 17, 2022	The Port 455 Klutey Park Plaza Henderson, KY 42420 270.684.0449	Rachel Heath Site Manager River Valley Behavioral Health <a href="mailto:heath-rachel@rvbh.com">heath-rachel@rvbh.com</a> Cell: 270.702.8457

<b>COMMUNICARE (Region 5)</b> <b>Drop-In Center Site Manager:</b> Andrew King – <a href="mailto:aking@communicare.org">aking@communicare.org</a> <b>Youth Leadership Coordinator:</b> vacant <b>TAY Lead:</b> Jaime Kisselbaugh - <a href="mailto:jkisselbaugh@communicare.org">jkisselbaugh@communicare.org</a> - 270.765.2605 x1528/cell: 270.734.4138 <b>Radcliff Clinic Manager</b> – Gregory Marcum – <a href="mailto:gmarcum@communicare.org">gmarcum@communicare.org</a> or 270.351.8166 x1324 <b>TAY Coordinator:</b> vacant <b>iHOPE Lead (First Episode Psychosis/FEP):</b> Linda Smiley – <a href="mailto:lsmiley@communicare.org">lsmiley@communicare.org</a> or 270.769.1304 x1135/cell: 270.734.2202 <b>Youth Substance Use Treatment Coordinator:</b> Susan Crider – <a href="mailto:scrider@communicare.org">scrider@communicare.org</a>		
Agency	Location	Contact
Communicare (Hardin County) Opened August 2017	The Spot - Radcliff 1072 South Dixie Blvd. Radcliff KY 40160	Andrew King Site Manager <a href="mailto:aking@communicare.org">aking@communicare.org</a>

<b>Seven Counties Services (Region 6)</b> <b>Drop-in Center Site Manager:</b> Arneka White – <a href="mailto:awhite@sevencounties.org">awhite@sevencounties.org</a> or 502.589.8085 x2038 <b>Youth Leadership Coordinator:</b> Andrew Compton - <a href="mailto:acompton@sevencounties.org">acompton@sevencounties.org</a> <b>TAY Coordinator:</b> Mitchell Tinsley – <a href="mailto:mtinsley@sevencounties.org">mtinsley@sevencounties.org</a> <b>iHOPE Lead (First Episode Psychosis/FEP):</b> Kayla Day – <a href="mailto:kday@sevencounties.org">kday@sevencounties.org</a> or 502.589.4673 x2625 <b>Youth Substance Use Treatment Coordinator:</b> Crystal Howard - <a href="mailto:choward2@sevencounties.org">choward2@sevencounties.org</a> or 502.589.8070		
Agency	Location	Contact
Seven Counties Services (Jefferson County) Opened December 10, 2015	TAYLRD 1020 East Broadway, Unit 101 Louisville, KY 502.287.0602	Arneka White Site Manager <a href="mailto:awhite@sevencounties.org">awhite@sevencounties.org</a> 502.314.2574

**PATHWAYS (Region 10)****TAYLRD Regional Coordinator:** Madison Arrington – [Madison.arrington@pathways-ky.org](mailto:Madison.arrington@pathways-ky.org) or 606.826.0289 x4222**TAY Coordinator:** Keerien Mullins – [kmullins@pathways-ky.org](mailto:kmullins@pathways-ky.org)**Youth Leadership Coordinator:** Katherine Romans- [kromans@pathways-ky.org](mailto:kromans@pathways-ky.org)**iHOPE Lead (First Episode Psychosis/FEP):** vacant**Youth Substance Use Treatment Coordinator:** Aja Gibbs – [agibbs@pathways-ky.org](mailto:agibbs@pathways-ky.org)

Agency	Location	Contact
Pathways (Boyd County) Opened June 2016	The Drop 3701 Landsdowne Drive Ashland, KY 606.393.1522	Taylor Eden Site Manger <a href="mailto:teden@pathways-ky.org">teden@pathways-ky.org</a> 606.393.1522
Pathways (Lawrence County) Opened September 2018	The Drop 60 Professional Drive Louisa, KY 41230 606.826.0289	Taylor McCarty Site Manager <a href="mailto:tmccarty@pathways-ky.org">tmccarty@pathways-ky.org</a> 606.826.0289
Pathways (Montgomery County) Opened May 2024	The Drop 300 Foxglove Drive Mt. Sterling, KY 606.420.0125	Lukas Thompson Site Manager <a href="mailto:lthompson@pathways-ky.org">lthompson@pathways-ky.org</a> 606.420.0125

**Mountain (Region 11)****Drop-in Center Site Manager:** Amanda Barnes – [amanda.barnes@mtcomp.org](mailto:amanda.barnes@mtcomp.org)**Youth Leadership Coordinator:** Taylor Vandeventer – [taylor.vandeventer@mtcomp.org](mailto:taylor.vandeventer@mtcomp.org)**TAY Coordinator:** Ethan Doebel - [ethan.doebel@mtcomp.org](mailto:ethan.doebel@mtcomp.org) or 606-506-1155**iHOPE Lead (First Episode Psychosis/FEP):** Marquita Little - [Marquita.little@mtcomp.org](mailto:Marquita.little@mtcomp.org) or 606-339-6572**Youth Substance Use Treatment Coordinator:** Mary Reffitt – [mary.refitt@mtcomp.org](mailto:mary.refitt@mtcomp.org)

Agency	Location	Contact
Mountain (Floyd County) Opened November 2022	The Clubhouse 113 Regency Park Drive Prestonsburg KY, 41653	Amanda Barnes Site Manager <a href="mailto:amanda.barnes@mtcomp.org">amanda.barnes@mtcomp.org</a> 606-506-1155

**KENTUCKY RIVER (Region 12)****Director for TAY Services:** - Amanda Wooton - [amanda.wooton@krccnet.com](mailto:amanda.wooton@krccnet.com)**Asst. Director for TAY Services:** Jessica Deaton - [jessica.deaton@krccnet.com](mailto:jessica.deaton@krccnet.com)**TAYLRD Project Director:** Megan "Storm" Cox - [Megan.cox@krccnet.com](mailto:Megan.cox@krccnet.com) or 606.428.4006**Youth Leadership Coordinator:** Destini Fields - [destini.fields@krccnet.com](mailto:destini.fields@krccnet.com) or 606.335.6221**TAY Coordinator:** Ruby Adams - [ruby.adams@krccnet.com](mailto:ruby.adams@krccnet.com) or 606.335.4530**FEP Leads (no iHOPE Program):** Dreama Wooten - [dreama.wooten@krccnet.com](mailto:dreama.wooten@krccnet.com) /Lillie Adams - [lillie.adams@krccnet.com](mailto:lillie.adams@krccnet.com)**Youth Substance Use Treatment Coordinator:** Kendra Cole – [kendracombs08@gmail.com](mailto:kendracombs08@gmail.com) or 606.668.7420

Agency	Location	Contact
KY River (Perry County) Opened June 6, 2016	Perry County Sapling Center 608 High Street, Hazard, KY 41701 606.435.1447	Jennifer Warren Site Manager <a href="mailto:Jennifer.warren@krccnet.com">Jennifer.warren@krccnet.com</a>
KY River (Letcher County) Opened November 3, 2016	Letcher County Sapling Center 280 Main Street Whitesburg, KY 41858 606.633.0730	Shiann Coats Site Manager <a href="mailto:Shiann.holt@krccnet.com">Shiann.holt@krccnet.com</a>
KY River (Knott County) Opened June 5, 2017	Knott County Sapling Center 820 Highway 160 South Hindman, KY 41822 606.785.0004	David White Site Manager <a href="mailto:David.white@krccnet.com">David.white@krccnet.com</a>
KY River (Knox County) Opened March 12, 2019	Knox County Sapling Center 460 Court Square Barbourville, KY 40906 606.595.5370 x6000	Nichola Earls Site Manager <a href="mailto:nichola.earls@krccnet.com">nichola.earls@krccnet.com</a>
KY River (Leslie County) Opened April 2023	Leslie County Sapling Center 21883 Main Street Hyden, KY (502) 736-0920 Or (606) 373-6100 ext. 4662	Marci Cobb Site Manager <a href="mailto:Marci.cobb@krccnet.com">Marci.cobb@krccnet.com</a>

**DMH Transition Age Youth Program Administrator**Janice Johnston – [janice.johnston@ky.gov](mailto:janice.johnston@ky.gov) or 502.782.6170

Department for Behavioral Health, Developmental and Intellectual Disabilities/Division of Mental Health (DMH)

**What is Psychosis?** It involves the loss of contact with reality. A psychotic episode occurs when a person is unable to tell the difference between what is real and what is just in their minds. There are significant changes in the person's thoughts, beliefs, perceptions and behaviors. They may experience hallucinations such as hearing, seeing, tasting, smelling and/or feeling things that aren't there; or experience delusions. These experiences can feel very real and distressing and can make it difficult to carry on with regular life tasks such as school, work, relationships.

**What is iHOPE?** iHOPE is a specialized team based program that provides early intervention services for youth and young adults with or at risk of symptoms of psychosis. This program serves young people between 15-30 years old. Early intervention and support can increase the possibility of continuing with school, work, and full meaningful lives in the community.

**What does iHOPE offer?** An intensive team based program that includes various support options. All services and supports are provided to the young person based on their interests and needs and can include:

- Peer support
- Employment and education support
- Individual and group counseling
- Case management
- Medication Management
- Family groups to learn skills and support each other

**iHOPE supports young people  
with or at risk of psychosis and their families.**

#### **Additional Referral Guidelines**

- Psychosis symptoms lasting no longer than 12 months
- IQ over 70
- Not already receiving treatment for psychosis
- Symptoms not known to be caused by a medical condition or drug use

## **Other Possible Symptoms**

### **Reduced Performance**

- Trouble reading or understanding complex sentences
- Trouble speaking or understanding what others are saying
- Becoming easily confused or lost
- Trouble in sports or other activities that used to be easy
- Attendance problems related to sleep or fearfulness

### **Behavioral Changes**

- Extreme fear for no apparent reason
- Uncharacteristic actions or statements that make no sense
- Impulsive and reckless behavior - giving away all belongings
- New, bizarre beliefs
- Incoherent or bizarre writing
- Extreme social withdrawal
- Decline in appearance and hygiene
- Dramatic changes in sleep: sleeping much of the day or very little
- Dramatic changes in eating behavior

### **Perceptual Changes**

- Fear that others are trying to hurt them
- Heightened sensitivity to sights, sounds, smells or touch
- Making statements like “my brain is playing tricks on me”
- Hearing voices or other sounds that others don't
- Visual changes - colors more intense, faces distorted, lines wavy
- Racing thoughts
- Feeling like someone is putting thoughts into their head or reading thoughts

**For more information about iHOPE  
please contact your local provider (see back cover)**



## iHOPE Programs – April 2024



Community Mental Health Center Region	iHOPE Program Contact Information	Counties Served
Four Rivers <b>iHOPE Start Date</b> Jan. 2017	<b>iHOPE – Four Rivers</b> <b>Amanda McIntosh</b> <a href="mailto:amcintosh@4rbh.org">amcintosh@4rbh.org</a> 415 Broadway, Paducah, KY 42001 270.442.7121 <a href="http://www.4rbhihope.org">www.4rbhihope.org</a>	Ballard, Calloway, Carlisle, Fulton, Graves, Hickman, Marshall, and McCracken.
LifeSkills <b>iHOPE Start Date</b> Jan. 2017	<b>iHOPE - LifeSkills</b> <b>Katie Scheuer Hopper</b> <a href="mailto:kscheuer@lifeskills.com">kscheuer@lifeskills.com</a> 328 East 10th Avenue, Bowling Green, KY 42101 270.901.5000 ext 1167 <a href="http://www.lifeskills.com/ihope">www.lifeskills.com/ihope</a>	Butler, Edmonson, Hart, Logan, Warren, Barren, Metcalfe, Simpson, Allen, and Monroe Counties
Communicare <b>iHOPE Start Date</b> Jan. 2018	<b>iHOPE - Communicare</b> <b>Linda Smiley</b> <a href="mailto:lsmiley@communicare.org">lsmiley@communicare.org</a> 1311 N Dixie Hwy, Elizabethtown KY 42701 Office: 270.769.5304 x1135 <a href="http://www.communicare.org">www.communicare.org</a>	Hardin, Nelson, Meade, Grayson, Larue, Breckinridge, Washington, Marion
Seven Counties <b>iHOPE Start Date</b> Jan. 2017	<b>iHOPE – Seven Counties</b> <b>Kayla Alvey</b> <a href="mailto:KAlvey@sevencounties.org">KAlvey@sevencounties.org</a> 914 E. Broadway, Louisville, KY 40202 502-314-0583 <a href="https://sevencounties.org/mental-health/child-mental-health-getting-started/">https://sevencounties.org/mental-health/child-mental-health-getting-started/</a>	Jefferson, Bullitt, Spencer, Shelby, Oldham, Henry, and Trimble Counties
Pathways- EAST (FIVCO Region) <b>iHOPE Start Date</b> Jan. 2017	<b>iHOPE- Pathways East</b> <b>Tyler Perkins</b> <a href="mailto:Jonathan.Perkins@Pathways.ky.org">Jonathan.Perkins@Pathways.ky.org</a> 3701 Landsdowne Drive, Ashland, KY 41102 606.324.3005 <a href="http://www.pathwayskyhealth.com/ihope/">www.pathwayskyhealth.com/ihope/</a>	Boyd, Carter, Greenup, Elliott, Lawrence
Pathways- West (Gateway Region) <b>Expansion Site</b> <b>EST. Jan. 2024</b>	<b>iHOPE - Pathways</b> <b>Donnah Clark</b> <a href="mailto:dannah.clark@pathways-ky.org">dannah.clark@pathways-ky.org</a> 300 Foxglove Drive, Mt. Sterling, KY 40353 859.498.2135 <a href="http://www.pathwayskyhealth.com/ihope/">www.pathwayskyhealth.com/ihope/</a>	Montgomery, Morgan, Rowan, Menifee, Bath
Mountain <b>iHOPE Start Date</b> Jan. 2016	<b>iHOPE – Mountain</b> <b>Marquita Doebel</b> <a href="mailto:Marquita.Doebel@mtcomp.org">Marquita.Doebel@mtcomp.org</a> 104 South Front Avenue, Prestonsburg, KY 41653 606.886.8572 x4551 <a href="http://www.mtcomp.org">www.mtcomp.org</a>	Johnson, Martin, Magoffin, Floyd, and Pike Counties
Cumberland River <b>iHOPE Start Date</b> Jan. 2016	<b>iHOPE – Cumberland River</b> <b>Roxie Huffman</b> <a href="mailto:Roxie.Huffman@crccc.org">Roxie.Huffman@crccc.org</a> 260 Valley View Lane, P.O. Box 758 Mt. Vernon, KY 40456 Phone: 606-256-2129, x121 <a href="http://www.crbhihope.org">www.crbhihope.org</a>	Rockcastle, Jackson, Laurel, Clay, Whitley, Knox, Harlan and Bell Counties
New Vista <b>iHOPE Start Date</b> Jan. 2018	<b>iHOPE – New Vista</b> <b>Shannon Smith</b> <a href="mailto:shannon.smith@newvista.org">shannon.smith@newvista.org</a> 201 Mechanic Street, Lexington KY 40507 859.253-1686 <a href="http://www.newvista.org/mental-health/adults/serious-mental-illness.com">www.newvista.org/mental-health/adults/serious-mental-illness.com</a>	Fayette and Madison and other areas within 30 minutes of Lexington.

KY Department for Behavioral Health, Developmental and Intellectual Disabilities/Division of Mental Health (DMH)  
Early Interventions for First Episode Psychosis Administrator: Allison Paul-Perry, [Allisonk.Paul@ky.gov](mailto:Allisonk.Paul@ky.gov)



## What Family Advocates to Do to Promote IPS Supported Employment

- Bring community awareness and education to reduce stigma
- Encourage clients and family members
- Educate community about IPS
- Promote IPS on affiliate social media
- Provide IPS handouts events
- Work with IPS supervisor to write a news article for local papers distributed within county health center areas
- Participate with local Chamber of Commerce (if provided a membership) - networking with localemployers
- Work with IPS team to gather success stories
- Family advocates may try to meet with IPS Employment Specialist supervisor to discuss services
- Presentations at local mental health agencies
- Promote public and community awareness of mental illness for greater acceptance

## How Family Members Can Be Involved in Supported Employment Activities

- ✓ **Learn** about how employment can be part of mental health treatment and how employment helps with recovery, stabilization, housing, physical health, improved self-esteem, and other important quality of life goals.
- ✓ **Teach** others about Supported Employment through family-to-family and word of mouth.
- ✓ **Support** local Supported Employment programs.
- ✓ **Contact** local Supported Employment program staff to learn how to be more involved and supportive of your loved one's employment efforts.
- ✓ **Mentor** and support individuals and family members.
- ✓ **Share** contact information for community employers that you may know and share job openings you learn about.
- ✓ **Advocate** at the local, state, and national level for Supported Employment;
  - Local & state legislative advocacy
  - Local mental health agency & state agency advocacy
  - Speak up in meetings about supported employment (ask questions, tell success stories, share ideas)
- ✓ **Write** about the importance of Supported Employment in newsletters, emails, and other public forums.
- ✓ **Join** the IPS Supported Employment Family Partnership Initiative in Vermont.

For Questions or Ideas, please contact:

Laura Flint at 802-241-0094

Carolyn McBain at 802-241-0105



## How Providers Can Support Family Member Involvement in Supported Employment Activities

- ✓ **Learn** about how employment can be part of mental health treatment and how employment helps with recovery, stabilization, housing, physical health, improved self-esteem, and other important quality of life goals. Learn the principles and practices of IPS Supported Employment.
- ✓ **Teach** family members, individuals living with a mental illness, and colleagues about Supported Employment and how to get involved.
- ✓ **Ask** people how a family member (can be a relative, a friend, partner, or significant individual in person's life) can be included as part of the larger support network to help with reaching goals. Share research showing outcomes are improved with family member involvement.
  - Engage in discussions as soon as possible.
  - Develop a list of ideas on how family members can be involved in respectful, meaningful ways if person cannot think of reasons to include family members.
- ✓ **Communicate** with agency's Supported Employment program staff (with permission of individual) about best methods for contacting & involving family member.
- ✓ **Listen** with an open mind when a family member calls you and wants to share ideas, concerns, frustrations or information about their loved one – you can always be supportive even if a person does not want the family member involved. Ask if family member knows local business owners or knows of any job openings (this is a general question that does not require any disclosure).
- ✓ **Attend** family meetings and NAMI events to learn about and share updates and to encourage family members' involvement.
- ✓ **Mentor** and support family members when possible.
- ✓ **Advocate** with family members for Supported Employment;
  - Local & state legislative advocacy,
  - Local mental health agency & state agency advocacy,
  - Speak up in meetings about supported employment (ask questions, tell success stories, share ideas).

Questions or ideas?

Please contact: Laura Flint at 802-241-0094  
Carolyn McBain at 802-241-0105





# IPS

# Supervisor

## **Supervisor Duty Checklist**

### **Weekly**

- Conduct unit meeting (use sample agenda and review goals, job leads, caseload size and, celebrate successes)
- Review the active client roster and ensure it is up to date for each employment specialist.
- Check in with employment specialists daily or every other day to provide praise, support, encouragement and to brainstorm ideas. Celebrate with employees when good things are achieved.
- Monitor employment specialist time in the community by reviewing calendars – goal is 65%.
- Review, approve and offer guidance if needed to the job development logs. Minimum of six per week.
- For new staff, weekly field mentoring to help plan and prepare for development of the career profile. Modeling how to organize a career profile meeting, planning for job development and assisting the employment specialist in the community.

### **Monthly**

- Communicate with mental health team leaders and encourage referrals to the IPS program. Be a champion for the value of work.
- Attend a treatment team monthly as a new supervisor or with new employment specialists to assist with integration and become familiar with all treatment teams your program works with.
- Field mentoring for new employment specialists or those with low outcomes (less than 40% of caseload employed)
- Double check that written postings are in common areas about working and how to access your program.
- Review at least one case file for quality for each employment specialist using the IPS chart review form.
- Review and monitor OVR service fee billings or bonus payments
- Meet with your IPS state trainer to review program services (at minimum)

- For Youth IPS programs, ensure that you meet with at least 80% of youth participants and the employment specialist.
- Attend a monthly OVR meeting with employment specialists to offer support and relationship building with assigned OVR counselors.

### **Quarterly**

- For new programs or those with Fair Fidelity, host a steering committee meeting
- Review current client outcomes with the team and set new goals to improve program performance. Set a team goal and individual employment specialist goal.
- Attend the virtual IPS supervisor get-togethers for new IPS updates and training.
- After completion of the first fidelity review, begin to enter client outcome data into the IPS reporting online program.
- Field mentoring with staff that are experienced and have more than 40% of their caseload employment.
- Develop a strategy with agency leaders to measure the rate of competitive employment and share this outcome with agency leadership and staff. Once developed, this is shared quarterly.
- Reach out to office OVR branch managers in the area(s) you cover to foster relationship building, talk about successes, referrals, concerns, or any issues.

### **At minimum of twice per year**

- Review agency intake and annual assessment tools to ensure there are targeted questions about work and a way to refer to the IPS program.
- Review agency social media and website to ensure IPS information is up to date
- Ensure that at minimum, two client stories are shared with agency staff, clients, and the community. This can be video, written or audio in the person's own words.
- Ensure that the IPS program is part of the agency quality assurance process that monitors all fidelity items, some fidelity items, or the total score.
- Visit with the CEO and Executive Director to ensure they are knowledgeable about IPS principles and to discuss successful outcomes or barriers.
- Check in with any external partners such as CWICs to foster relationship building and ensure program quality.

## **Yearly**

Ensure the CEO/Executive Director communicates with agency staff about how IPS services support the mission of the agency. This can be during a presentation, newsletter, email, etc. For new programs this is to be completed within the first ***six months*** of program implementation.

Attend the annual IPS conference

Attend or support staff to attend other employment related events such as APSE or KRA.

**Refer to IPS Trainer for the full document.**

Tips for Employer Relationship Building:  
A Guide for IPS Supported Employment Supervisors



*Developed by:*

*Sarah Swanson, Dartmouth PRC; Jerry Wood, Division of Vocational Rehabilitation Vermont;  
Laura Flint, Vermont Department of Mental Health*

June 2012



## Guidelines for Supervising Job Development

**Collect and review employer contact logs on a weekly basis.** This will help in two ways. First, it will ensure that employment specialists do not fall behind in making contacts since the logs are always due soon. It will also ensure that employment specialists fill the logs out soon after their appointments with employers. This is important because employers often provide detailed information, which may be forgotten without a written record.

### Tips:

- Be sure that employment specialists only record contacts with people who have hiring authority. Remind them that this is about building relationships, so while a cashier or administrative assistant may have helpful information, that interaction will not further the relationship with the person who hires.
- Encourage specialists to record important information such as the name of their contact, date, information about the business, and details about the type of job seekers the employer would like to meet.
- Ask specialists why keeping a log is important. Help each specialist develop a routine for recording information that meets his or her individual style.

**Discuss employer contacts with specialists.** This is an opportunity to teach. Ask questions, such as the following:

- What was the purpose of the contact?
- How did you prepare?
- Describe the meeting. What do you think made the meeting go well (or not well)? Was a particular question helpful or unhelpful? Was there a point at which the employer appeared particularly interested in the conversation? Did the employer do most of the talking?
- What is this employer looking for in an employee? What kinds of job candidates is she hoping to meet?
- How could you see this employer helping over time (e.g. hiring, informational interviews, referrals to suppliers and business peers)?
- What are your plans to follow-up?
- Have you sent a thank-you note?
- Where is your relationship with this employer?

### Tips:

- Strongly encourage specialists to take their time building relationships before asking about job openings. For example, always offer to make an appointment to come back and learn about the employer. Spend the appointment learning how the business operates, the type of job candidate the employer would like to meet, etc., rather than focusing on job openings or “selling” the IPS program.
- Help specialists plan to follow up in a timely manner. For example, take a thank-you note within a few days. Or, if the employer did spontaneously mention a job opening that is a good fit for a job seeker in IPS, return within a day or two. For example, “I’ve had time to consider the qualities that you are looking for in job candidates and I believe that I do know a person who would be a good fit for your business. Would you like to hear about her?”

**Ask employment specialists to keep a list to 12-15 employer relationships that they will nurture over time.** During supervision, go through this list just as you would go through a caseload list. For each employer you might ask:

- When was the last time that you had contact with the employer? What happened?
- Where is your relationship with the employer now?
- Are there other people at the company whom you would like to meet?
- Is there more that you would like to learn about this employer?
- What are your plans to work on this relationship? When will you have your next contact? What will be the focus of the next contact?

### Tips:

- Persistence is critical. The two magic words for supervising job development are, “Go back.” By going back in person, employment specialists demonstrate that they are reliable—they are not going to disappear once a person is hired. They also demonstrate that they are committed to the relationship and willing to work hard to earn the employer’s trust.
- Help specialists plan for repeat visits. What will be the purpose of the visit? What will they say when they see the employer? Will they ask to meet another manager? Will they ask for an introduction to another employer in the area? Do they have new (and genuine) questions to ask?
- Help specialists think about what they are bringing to the employer that is of value to her, and what the employer is bringing to the IPS team that is of value to the team. If time goes by and it does not appear that the relationship has potential to be valuable to both parties, encourage the employment specialist to take this employer off the list. Remind specialists that this relationship needs to benefit *both* parties and that the employment specialist is responsible for ensuring that this is the case.

**Go into the field with employment specialists to practice job development.** Even if you are not experienced in this area, going out with specialists will earn you credibility as you demonstrate that you are willing to do job development. Also, make time to accompany people who have been doing this work for awhile, in addition to going out with new specialists. We all benefit from coaching. Going out with skilled job developers will also help you share their strategies with the rest of the team. To help you structure field mentoring and plan to improve particular skills, consider using a field mentoring checklist such as the one found at <https://www.ipsworks.org/>, select “resources” and then “supervisor tools.”

## Question Guide for IPS Supported Employment Supervisors

Below are some common situations that come up during IPS supervision and suggestions for questions that supervisors can ask to try to get a sense for what is happening, or to help employment specialists plan services.

### **Someone is not consistently engaged in the program:**

*The employment specialist may feel frustrated. Your task is to help her see things from the client's point of view and to reinforce anything she is doing that would increase her client's interest in getting together with her.*

- What have the two of you done during your last few appointments? (If they have not been going out together to look for jobs or whatever would be directly related to the person's goal, encourage that they do so that the person feels like the focus of the meetings is on his goals.)
- Do you schedule regular, weekly appointments?
- Do you think he has trouble remembering your appointments? Is ambivalent about work? Has competing priorities? Dislikes job hunting?
- What does the mental health team think is interfering with appointments?
- What does he say about work?
- When you do see him, what do you say about missed appointments? (Encourage the specialist to be very careful to avoid anything that might sound like a rebuke. Instead, the approach should be to tell the client that she is happy to see him again—people are more likely to go to appointments with practitioners who are hopeful and positive.)
- Where do you meet him? Are the appointments at a convenient time and location for him?

### **Someone has been looking for work without success:**

- When was the last time that he applied for a job? And how did you follow up on the job application?
- Is he okay with disclosure? If so...When did you last visit an employer on his behalf? What happened? How often are you meeting with employers for him?
- What did the two of you do the last time that you got together?
- What is the plan—how often do you job search together? What does he do to find work in between appointments? What do you do to help him find work in between appointments? Is all of this in the written plan?
- *Supervisor: you may also think about reviewing this person's chart to get a sense of how steady the job search has been and whether or not the employment specialist needs help.*

### **Somebody gets a job:**

*As a supervisor, your focus is to celebrate with the employment specialist, but also to encourage the specialist to plan job supports, rather than taking a wait and see approach. You might also encourage the specialist to offer extra supports at the start of a job and then back off if the person does well.*

- Celebrate
- What will he be doing?
- Why do you think this is a good job fit?
- What problems might you anticipate? (If employment specialist says none, dig deeper. For example, What do you know about his job history? Why have previous jobs ended? Is he currently having any symptoms? Is substance use a problem?...)
- When is his start date? When do you plan to see him? (If the specialist says she will call him, encourage face-to-face contact soon after the job start.)
- How does he feel about disclosure? (If employment specialist will have contact with employer, you might ask, "What day will you contact the employer? How often will you contact the employer over the first few weeks?" Encourage the specialist to make contact by the end of the second day. )

### **Someone loses or quits a job unexpectedly**

- Celebrate. It's great that he had another job experience.
- What did your client say about the job end?
- What do you think happened?
- Were you able to get any feedback from his employer?
- What more do you know about your client? What were his strengths on the job? What supports seemed to help him? What problems did he have?
- What type of job might be a better fit?
- What might you do differently after observing this work experience?
- Have you made plans to start the next job search with him?



• • •

Scan the employment specialist's caseload for people who:

1. You haven't heard about recently
2. Who have been job hunting for 3 months or more
3. Who started work in the past month
4. Who are not engaged







### Data Collection and Quality Improvement Processes for Good IPS Fidelity

☑	Fidelity Item	Data Collection or Quality Improvement Process	Frequency
	<b>Integration of rehabilitation with mental health treatment:</b> Employment services documentation is integrated into mental health treatment records.	Minimally, the Career Profile (formerly known as the Vocational Profile), progress notes and employment plan are part of the mental health treatment record.	For each person served by the IPS program
	<b>Role of the IPS Supervisor:</b> Supervisor collects client outcomes, reviews outcomes with staff, and helps them develop goals for improvement.	Examples of data collected by supervisor include number of job starts for the program and for individual employment specialists as well as number and percent of people working on the team caseload and individual caseloads.	Quarterly
	<b>Agency focus on competitive employment:</b> Rate of competitive employment for all persons with serious mental illness served by the agency, which includes people who are not served by the IPS program.	Mental health agency leaders collect employment data and share outcomes with clinical supervisors and practitioners. Typically, they count any person who worked during the quarter, even if the person only worked one day.	Quarterly
	<b>Agency focus on competitive employment:</b> Agency intake includes questions about employment.	When people first begin receiving services at the agency they are asked about their interest in employment. Work history information is not sufficient. Sample questions: What are your thoughts about working? Would you like to learn whether your disability benefits would be affected by a job? Would you like to learn about a program that helps people return to work? Answers are documented in agency intake or initial assessment.	For each person with serious mental illness who receives services at the mental health agency

	<b>Agency focus on competitive employment:</b> People are asked about interest in work on an ongoing basis.	Questions about interest in employment (see above) are included in the annual assessment or treatment plan.	Annually or more often
	<b>Executive team support for supported employment:</b> Quality assurance review of IPS supported employment fidelity	The agency quality assurance process reviews the overall IPS fidelity score or scores for specific fidelity items in order to increase fidelity.	Every six months until good fidelity is obtained, annually thereafter
	<b>Ongoing work-based assessment:</b> Employment specialists spend a few weeks learning about each person’s work goals, education and work experiences, etc. They document this information in the Career Profile (formerly known as the Vocational Profile).	The Career Profile is updated with each job start, job end and education experience. A sample profile and forms for updating the profile are at <a href="https://www.ipsworks.org">https://www.ipsworks.org</a> .  Information for the form comes from the job seeker or student, mental health practitioners, mental health records, and (with permission) family members.	For each person served by the IPS program.
	<b>Rapid job search:</b> Number of days from first IPS appointment to first face-to-face employer contact by employment specialist and/or client	Some supervisors track this by asking for information during the weekly vocational unit meeting: “Who met with a new client for the first time this week?” “Which clients started a job search this week by either you and/or them having contact with an employer?”	For each client in the IPS program.
	<b>Individualized job search:</b> Employment specialists and clients co-develop individualized, written employment plans.	Employment plans are individualized (pertain to each person’s preferences and needs regarding a job) and specific (spell out the steps to find a job and who will complete each step).	For each person served by the IPS program.

	<b>Job development—Frequent employer contact:</b> Employment specialists have six in-person contacts with employers (related to job development) each week.	Employment specialists document employer contacts on logs that are submitted to their supervisor weekly. The logs indicate whether the specialist met with someone who had hiring authority. Also, logs indicate that the activity was related to helping someone find a job, rather than providing job supports or another purpose.	Weekly
	<b>Diversity of jobs and diversity of employers:</b> Supervisors maintain a list of job starts that includes job titles.	Many IPS programs use Job Start Forms to update the Career Profile ( <a href="https://www.ipsworks.org">https://www.ipsworks.org</a> ). Employment specialists provide a copy to the supervisor when one of their clients gets a job. Supervisors track the first date of employment, job title and name of employer. If the business is a franchise (such as a fast food restaurant or grocery store chain) supervisors might also indicate when clients are working at separate stores.	For each job start
	<b>Individualized follow-along supports:</b> Employment specialists and clients co-develop individualized, written employment plans.	Written job support plans are individualized to each person’s preferences for supports and needs (i.e., based on work history, current issues, etc.). The plans indicate what services will be provided and how often.	For each person served by the IPS program.
<b>Recommended but not required:</b>			
	<b>Role of the IPS supervisor:</b> Mentoring (working side-by-side with employment specialists) for developing employer	Sample field mentoring forms for job development are at <a href="https://www.ipsworks.org">https://www.ipsworks.org</a> .	For each new specialist and for those who want to

	relationships		improve their job development skills
	<b>Work incentives planning:</b> Documentation provided by a trained benefits planner regarding a person's individualized situation is included in the employment record.	Employment specialists request a copy of the report provided to the client, provided that it is individualized and not merely a print out of Social Security rules.	For each person who receives work incentives planning (benefits planning)
	<b>Disclosure:</b> Employment specialists discuss each person's preferences regarding disclosure of a disability to employers.	Forms to document these discussions include the Career Profile and Disclosure Worksheet, <a href="https://www.ipsworks.org">https://www.ipsworks.org</a>	For each job search

**Field Mentoring Checklist for Job Development**

Date: \_\_\_\_\_ Employment Specialist: \_\_\_\_\_

Supervisor: \_\_\_\_\_

**BEFORE GOING OUT TO CONTACT EMPLOYERS:**

I. What happened when (employment specialist) followed up with employers from last field mentoring day?

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II. Today we will focus on refining or developing the following skills:

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**AFTER VISTING EMPLOYERS:**

I. Our successes:

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II. What we would do differently next time:

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**Field Mentoring Checklist for IPS**

Date: \_\_\_\_\_ Employment Specialist: \_\_\_\_\_

Supervisor: \_\_\_\_\_

**What skill was the focus of field mentoring? (For job development, see Field Mentoring Checklist for Job Development)**

Engaging clients

Conducting the career profile/developing the employment plan

Facilitating family meetings

Providing job supports

Education supports

Other: \_\_\_\_\_

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a. Strengths observed:

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b. Obstacles encountered:

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## IPS Supported Employment Unit Meeting

Typically, IPS group supervision begins with celebrations. To help specialists stay positive, the supervisor asks them to talk about what is going well. Either each employment specialist reports on one success from the previous week, or the supervisor asks volunteers to share something positive.

Next, the supervisor reviews assignments from the last week's meeting. Employment specialists are busy and their schedules change frequently. Knowing that the meeting will begin by reviewing last week's assignments helps people focus on their assigned work.

Supervisors are responsible for a well-organized meeting so that all participants contribute and receive help from others. They ask each team member for the names of one or two people to discuss. The supervisor then adds one or two names of people that he is concerned about or has not heard about lately. The supervisor jots down names so that he can move the meeting along and everyone's clients are discussed. The focus of the meeting is on persons served by the program and employer relationships. If it is necessary to review some administrative details (i.e., productivity, documentation, etc.) they are added to the end of the agenda so that the time spent on those areas is limited.

The length of the vocational unit meeting depends on the number of employment specialists on the team. A team of five employment specialists or more would require a 90-minute meeting. A team of three employment specialists could review what was needed in one hour. If there are 9-10 employment specialists, they should be divided into two teams that meet separately each week, and all together once each month. When it is necessary to divide the specialists into two teams, the supervisor should take into consideration mental health team assignments. If any specialists share a mental health team, put both into the same IPS team.

### Sample IPS Meeting Agenda for a 90-Minute Meeting

- I. Celebrations (10 minutes)
  - Each employment specialist shares one positive event from the past week
- II. Review of assignments from last week (5 minutes)
- III. Client discussions (40 minutes—some discussions will be longer than others)
  - Three people identified by employment specialists
  - One person who will start work later in the week (discussion of possible job supports)
  - Two people identified by the supervisor to discuss (because they have been job searching for four months without success)
- IV. Employer relationships (20 minutes)
  - Each employment specialists discusses an employer relationship and asks for ideas to move the relationship forward
  - Employment specialists describe notable employer contacts from the last week and share job leads
- V. Administrative issues (10 minutes)

# Case Consultation Presentation Form

Group Supervision Date: \_\_\_\_\_

**Client/Consumer I need to talk about:**

**Copies Distributed to Team Members of:**

- Vocational Profile
- Employment Plan
- Job Matching/Development Worksheet
- Follow-along Support Plan

**Synopsis of Situation:**

**What I need help with:**

- Engaging with a client
- Identifying client's strengths, preferences, work goal
- Ideas for helping client to identify goals or tasks toward their work goal
- Ideas for helping client achieve their goals or tasks
- Ideas Generated/Strategies for Job Development
- Identifying and/or obtaining resources
- Review follow-along support plan and generate ideas for increased support
- Other \_\_\_\_\_

**Ideas Generated:**

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_
6. \_\_\_\_\_
7. \_\_\_\_\_
8. \_\_\_\_\_
9. \_\_\_\_\_
10. \_\_\_\_\_
11. \_\_\_\_\_
12. \_\_\_\_\_
13. \_\_\_\_\_
14. \_\_\_\_\_
15. \_\_\_\_\_

## IPS Steering Committees

Steering committees, also referred to as stakeholder or leaderships groups, help plan and monitor IPS supported employment implementation and sustainment.

### **Purpose:**

Steering committees keep agency staff members focused on IPS implementation. Supervisors and administrators are busy and it is possible that good intentions are forgotten in the rush of daily work. Knowing that a group of stakeholders will soon convene to discuss program implementation incentivizes people to follow through with activities that help the IPS program. Another function of steering committees is to keep stakeholder groups, such as clients, Vocational Rehabilitation counselors, and family members, informed about the new practice. Finally, stakeholders provide valuable ideas and feedback to help the agency provide services in an effective manner.

### **Members:**

Steering committees strive to include a diverse range of stakeholders that may change over time depending upon the needs of the program. Participants may include:

- Agency administrators
- Family members and/or family advocacy groups
- Clients and/or peer advocacy groups
- IPS supervisor
- Vocational Rehabilitation supervisor and/or counselors
- Clinical director or a mental health supervisor
- Local chamber of commerce or economic development group
- Others (transportation providers, local college representative, ...)

Many steering committees also include employers, though employers are busy and need to know that their time is used well. One solution is to invite an employer who would not attend every meeting, but only those meetings in which her expertise was required. Another solution is to include a family member who is also a business owner or manager and can contribute from both perspectives. Each steering committee member should understand his/her role on the committee. People who do not feel useful on the committee will likely lose interest and stop participating.

### **Frequency of Meetings:**

Initially steering committee meetings should meet at least once each quarter. After the program achieves good fidelity, the group may decide to meet just twice each year. Steering committees continue to meet even after the program is well established because steering committees can help sustain the program.

Internal workgroups (usually a few people from the agency) should also meet on a monthly basis while the program is in start-up phase. These workgroups are usually comprised of three or four people who know the agency well and have the authority to make changes, for example, the quality assurance director, the clinical director and the IPS supervisor.

### **Educating Committee Members:**

The first task for each committee is to ensure that all members understand basic information about IPS, including the eight practice principles. Resources to educate steering committees can be downloaded from <http://www.IPSworks.org> . A video entitled “Introduction to Supported Employment” provides information about IPS principles along with the stories of people who have returned to work (see About IPS).

### **Activities:**

During implementation steering committees:

- Learn about IPS supported employment
- Examine the agency and system of care for policies or practices that conflict with IPS
- Review current employment outcomes, if available
- Build consensus for IPS by asking working people to share their stories and by talking about the relationship between work and recovery
- Discuss plans for IPS implementation, for example, begin reviewing the IPS supported employment fidelity scale to determine areas where change is needed

After the first IPS supported employment fidelity review, steering committees review the fidelity report and discuss which items to focus on first. For example, to improve fidelity to Zero Exclusion Criteria, committee members would brainstorm ideas to help people access IPS. They might discuss training so that mental health practitioners would understand that people can work successfully in spite of psychiatric symptoms, housing problems, substance abuse disorders, etc. If the group wants to improve Collaboration with Vocational Rehabilitation they might brainstorm ideas for the IPS team to meet with Vocational Rehabilitation counselors on a monthly, or more frequent, basis.

Over time the committee would continue to work on improving and sustaining good fidelity. They would monitor employment outcomes and discuss strategies to increase the number of working people in the IPS program or in the entire agency. Group members also talk about issues related to sustaining the program, such as funding, or issues related to expanding the program so that more people can go to work.

## Sustaining IPS Program Steering Committee

### Sample Meeting Agenda

#### Participants:

Pat Greer, mental health agency, chief operating officer  
John Adkins, mental health agency, clinical director  
Loretta Walker, IPS supervisor  
Dale Rawlings, mental health agency, chief financial officer  
Sue Snyder, Vocational Rehabilitation supervisor  
Jim Johnson, National Alliance for Mental Illness  
Tony LeRose, family member  
Laura LeRose, family member  
Debra Bright, IPS client  
Janet Allerby, IPS client  
Nancy Jorgeson, IPS client  
Ed Goetz, IPS client  
Joe Escher, employment specialist

#### I Employment Specialists Caseloads

- Employment specialist caseloads are at 32 people which has a negative impact on outcomes
- Vocational Rehabilitation counselors, and case managers, would like to make more referrals
- Is there revenue to support another position?

#### II Agency Rate of Employment

- Agency is ready to begin measuring employment for all consumers with severe mental illness
- Discussion of how employment outcomes will be used in supervision
- Feedback from group

#### IV Promoting a Culture that Supports Work

- How can we recognize practitioners, administrators, and others who are champions for IPS and competitive employment?

#### V Review of Fidelity Action Plan

- Discussion of items with a rating of “4.” How can we improve?
- Loretta to begin drafting fidelity action plan from this discussion

Meeting schedule: Once each quarter



# **IPS**

# **Employment**

# **Specialist**

## Employment Specialist Duty Checklist

### **Weekly**

- Actively participate in the weekly unit meeting with your supervisor and other employment specialists
- Review your active client roster and ensure that it is up to date with your client information
- Have client related contacts with OVR counselors to discuss shared clients and referrals. This can be via phone, email, or in person.
- Conduct at minimum, six face-to-face employer contacts with those who have hiring authority
- Check in with your supervisor and fellow employment specialists for encouragement, share successes or to get advice
- Ensure that at minimum, 65% of your time is spent out in the community on behalf of clients. Examples include meeting with OVR, working on job development or the career profile, talking to employers, meeting with family members, or providing support services.
- Complete job development logs and submit to your supervisor for review and approval
- Make sure that you spend time in the location of each of your treatment teams for collaboration and relationship building.
- If you are a new employment specialist, you should be working with your supervisor on weekly field mentoring that can include how to plan and prepare for job development, career profile information gathering, or meeting with employers.
- For clients who have just obtained work – ensure you met with the client one week before starting work and three days after starting the job. You must also meet with that client weekly for the first month.
- Attend your weekly treatment team meetings. You should be part of up to two treatment team meetings from which at least 90% of your caseload is comprised. Other referrals may be self-referrals or from OVR.

### **Bi-Weekly**

- Check-in with your state trainer, if needed. This can be in person, via zoom or email.
- Check in with yourself on your goals you have developed with your supervisor. Does anything need to be adjusted? How are your goals progressing?



Check in on your paperwork and notes, are you up to date? Best to stay up to date as not to overwhelm yourself at the end of the month.

## **Monthly**

Have a scheduled face-to-face meeting with your assigned OVR Counselor(s) to share in client celebrations, discuss new referrals, existing referrals, and any other issues.

Make sure you have submitted your monthly notes to your assigned OVR Counselor(s) by the 5<sup>th</sup> of each month.

Check OVR authorizations with your supervisor to make sure billings are up to date or authorizations are not expired.

Follow up with employers that you are keeping relationships with, even though they are not hiring.

Have at least one field mentoring or job development experience with your supervisor.

Conduct monthly outreach attempts, even if the outreach attempts are not successful for individuals on your caseload.

Make sure that you are only providing IPS employment services. If you feel you are being pulled into other assignments, talk about this with your supervisor and your state trainer.

At minimum, ensure you are providing monthly supports to clients that are working.

## **Quarterly**

If a new program or program with a fair fidelity score, work with your supervisor to host a quarterly steering committee meeting with internal and external partners.

Work with your state trainer to conduct a chart review of documentation

Make sure that your IPS signage is in the offices of your treatment teams lobby or common areas where clients visit.

Invite your supervisor to attend at minimum one of your treatment team meetings each quarter. Invite them more as needed for assistance and guidance.

Review your team and individual goals with your IPS supervisor.

Evaluate the effectiveness of your attendance at treatment team meetings. Do you need a reboot or to reeducate members about IPS to increase referrals? Or need to meet one-on-one with a member or members? Consult your supervisor or state trainer if needed.

Make sure that you have been revisiting the issue of disclosure with clients and documenting these conversations.

Attend the employment specialist virtual get together provided by the IPS state trainers. These training events are generally provided on a quarterly basis.

### **At minimum of twice per year**

If a program with good or exemplary fidelity, work with your supervisor to host a steering committee meeting twice a year with internal and external partners.

Ensure that at minimum, two client stories are shared with agency staff, clients, and the community. This can be video, written or audio in the person's own words.

Check in with any external partners such as CWICs to foster relationship building and ensure program quality. This can be done with your supervisor.

### **Yearly**

Attend the annual IPS conference

Attend other employment related events such as APSE or KRA.

Ensure you receive the appropriate number of CEUs for the current fiscal year, determined by OVR. Check with your supervisor, OVR supported employment consultant or IPS state trainer for details.

Review your IPS caseload for those working successfully for the past year and determine if clients are ready for transition to treatment team and external support services.

seekers apply for positions from various locations. If that is not possible, encourage specialists to help people apply for jobs from a library.

On average, employment specialists spend more than five hours in the community each day.

**Examples of good implementation:**

Employment specialists spend time out of the office meeting with clients, visiting employers, taking people to Vocational Rehabilitation appointments, helping job seekers apply for jobs, etc. They return briefly to attend a vocational unit meeting or mental health treatment team meeting. At the end of the day, the specialists often return to the office to complete documentation and return messages. On average, each specialist spends more than five hours in the community each day.

Two examples of how employment specialists reported spending one workday:

<i>Time</i>	<i>Location</i>	<i>Activity</i>
8:00	client home	Meeting to talk about client's job
9:15	office	Documentation, phone calls, and emails
9:45	client home	Meeting to talk about someone's work goals
11:00		Lunch
11:30	office	Documentation, phone calls, and emails
12:30	VR office	Accompanied client to Vocational Rehabilitation appointment
2:00	client home/ business	Picked up client at his home and went together to a job interview
4:00- 5:00	office	Documentation, phone calls, and emails

<i>Time</i>	<i>Location</i>	<i>Activity</i>
9:00	office	Emails, documentation, and phone calls
9:30	office	Met with client about his current job
10:00	office	Looked on Internet for job leads
10:30	cafe	Met with a new client at a local café
11:30	client home	Met with another new client at his home
1:00	office	Mental health treatment team meeting
2:00	3 businesses	Employer contacts
3:00- 3:30	client workplace	Met with a client and his employer
3:45- 4:45	library	Helped a client with online job applications
4:45- 5:00	library	Returned emails



# Community Time

- If you work 37.5 hours per week, in order to meet 65% of community time you will need 24 hours in the community, that leaves 13 hours in the office. That's about 2.7 hours per day.
- If you work 40 hours a week, in order to meet 65% of community time you will need 26 hours in the community, that leaves 14 hours per week in the office. That's about 2.8 per day.

## What Counts as Community Time?

- Meeting with clients in community settings, client homes, libraries, parks, coffees shops, restaurants, career profile activities out of the office, etc.
- Accompanying clients to OVR appointments, meetings at OVR offices.
- Travel time from one work destination to another.
- Face to face job development, sitting in on interviews, business tours.
- Observing/visiting someone at the job site.
- Accompanying someone to the Social Security or food stamp office regarding benefits.
- Attending a benefits analysis meeting with a client.
- Meeting with the housing authority on how employment could affect their rent.
- Meeting at schools, colleges, and local career centers.

## What Does Not Count As Community Time?

- Vocational unit meetings in the community
- Writing notes in the community
- Virtual job development
- Client meetings in the office
- Mental Health Treatment Team meetings
- Meeting with clients in group homes , day programs, and other agency offices.

**Any activity that is done in the office does not count as community time.**

# Requesting a Reasonable **ACCOMMODATION**



## 1 What is a reasonable accommodation?

**It is an adjustment or modification made to a job or the workplace** or the usual manner or circumstances of performing the job that allows an applicant or employee with a disability to successfully apply for the job, perform the duties of the job, or enjoy the benefits and privileges of employment. Reasonable accommodation also applies to the application process.

## 2 How do I request a reasonable accommodation?

**Typically, just ask.** There is no special process to request an accommodation and you do not have to use special words. Nor do you have to put your request in writing. However, some contractors do have a specific process, so ask your employer.

## 3 What do I need to tell my employer?

**Simply tell your employer that you need an adjustment or change at work due to a disability.** Be prepared to provide your employer with enough information to show that you have a disability. It is important to note that you are not required to provide your entire medical or mental health history to obtain an accommodation. You only need to provide pertinent information to request an accommodation.

## What happens next?

After the request is made, the employer may ask that you complete certain forms, or follow other procedures. **Any procedures you are asked to follow cannot be used to prevent a timely accommodation from being provided or addressed.**



### Examples include:

- Providing written materials in accessible formats (large print, Braille, or disc).
- Adjusting or modifying work schedules.
- Providing readers or sign language interpreters.
- Holding recruitment, interviews, tests, and other parts of the application process in accessible locations.
- Holding staff meetings in accessible locations.
- Providing or modifying equipment and devices.
- Adjusting or modifying policies and procedures.
- Changing the work environment in ways that improve accessibility.

## Your "reasonable accommodation" may be different from those provided to other employees or job applicants.

This is because the accommodation depends upon the nature of the disability and the type of job. The accommodation, no matter what it is, may not be unduly costly or disruptive for your employer. Your employer can choose the type of reasonable accommodation that will be made available; however, the accommodation must allow an employee or applicant with a disability to be successful.

## If you believe you have experienced discrimination, contact OFCCP:

**1-800-397-6251 | TTY 1-877-889-5627**  
**[www.dol.gov/ofccp](http://www.dol.gov/ofccp)**



## Discovery

### Career Profile

One time payment  
\$750.00

Job Search Plan  
accompanies the  
Career Profile  
No Fee

Advance to Job  
Development

## Job Development

### Job Development Activity Note

Monthly until job  
start  
(Max.30 hr.)  
\$80.00 hr.

### Job Acquisition Report

One time report  
\$800.00 (60 days)  
\$400.00 (61+ days)

Job Support Plan  
No Fee

Advance to  
Supported  
Employment  
Services

## Supported Employment Services

### Supported Employment Services Note

\$80.00 hr.

&

### Employment Stability Assessment

Monthly & with  
the Extended  
Service Plan  
Day 1

Max. 24  
Months

Advance to  
Extended  
Services

## Extended Services

### Extended Services Plan

Due at:

Day 1 \$500

Day 45 \$1,500

Day 90 \$3,000

### Extended Services Report

Monthly for 90  
days

### Extended Services Youth

Monthly for 90  
days

\$80.00

### **BONUS PAYMENTS**

OVR Closes

## After OVR Closure

**Extended  
Services continue  
from the CRP as  
required 2 times  
monthly  
throughout the  
employment  
term.**

**Exception:**  
Approved Step-  
Down Support  
Plan: Consumer  
must be in  
extended services  
phase and  
employed at the  
position for 12  
months

# CAREER PROFILE TIP SHEET

Designed to make completing the profile more appealing. (Perfect to stick to the desktop)



## GETTING STARTED



### Begin by listening, learning, and building trust.

You are just getting to know each other. Instead of focusing on paperwork, review and memorize important questions to ask *before* meeting. If needed, bring a small pad to take notes and offer to share these with person. Listen for subtle tidbits of information related to employment/education to keep conversation focused. [Meet outside the office to learn the most!](#)

- Start where person is at and go at their pace.
- Listen with openness & curiosity to *person's story*.
- Use open-ended questions to discover details
  - Ask who, what, where, when, how (not why.)
- Use questions to guide, but avoid interrupting.
- Be hospitable – help person feel comfortable.
- Ideas on where to meet (ask person first):
  - Library, café, laundromat, park, book store, university, hotel lobby.

## GATHERING INFORMATION

Be okay not knowing everything at once – the details will come in time.

"HELP!  
I'LL NEVER GET  
THIS DONE!"

- Use existing information to populate form.
- Ask care managers, therapists, psychiatrists, Vocational Rehabilitation counselors, peers, family members (with permission) for information.
  - If no team, then ask for permission to chat with people who know person.
- Schedule time each day to add information to profiles until complete – keep at it!
- Have a goal to learn at least three new things about person with each meeting.
- Keep profile alive by using it and adding new information as it's discovered over time.
  - Share additions with job seekers and put in clinical file.



## ADDITIONAL RESOURCES

⇒ [www.ipsworks.org](http://www.ipsworks.org)

### BENEFITS OF PROFILE

- ⇒ Discovers passions and interests and strengths
- ⇒ Guides job choices and educational goals
- ⇒ Identifies disclosure preferences
- ⇒ Identifies supportive people to involve
- ⇒ Shows employment history
- ⇒ Illuminates supports needed
- ⇒ Informs useful job search and follow-along plans
- ⇒ Facilitates brainstorming of ideas in supervision

## Career Profile – Roadmap to Job Development IPS Supported Employment/\*Education Referral

*\*Assisting people to advance their careers through additional schooling and technical training has always been considered part of the IPS intervention. The Career Profile intends to gather information through conversation, not in an interview style. Information can be gathered in different sections and is not necessarily chronological. For further information, consult your IPS Trainer. \**

### Referral Face Sheet

**Date of referral:** Click here to enter text.

**Date of birth:** Click here to enter text.

**Social Security#:** Click here to enter text.

**Name:** Click here to enter text.

**Preferred Pronouns:** Click or tap here to enter text.

**Address:** Click here to enter text.

**Email:** Click here to enter text.

**Phone number/s:** Click here to enter text.

**Best way to reach:** Click here to enter text.

**Case Manager:** Click here to enter text.

**Therapist:** Click here to enter text.

**Office of Vocational Rehabilitation Counselor:** Click here to enter text.

Referral sent to Office of Vocational Rehabilitation

**Other healthcare/social service providers:** Click here to enter text.

**Court-appointed guardian? If so, please list their name and contact information.**

Yes  No  N/A Click here to enter text.

**Has this consumer signed a release of information (ROI) allowing recent treatment records to be released to OVR with this referral form?**  Yes  No

**How long has the consumer been receiving services at this referring agency?** Click here to enter text.

**What is the person saying about work? Why does s/he want to work now? What type of job?**

Click here to enter text.

**Is this person interested in further education to advance his/her career goals?**

Click here to enter text.



**Please include information about the person’s illness (*diagnosis, symptoms, etc.*). For example, how might the person’s illness (and/or substance use) affect a job or return to school?** [Click here to enter text.](#)

**What are some of the person’s strengths? (*Experience, training, personality, support, etc.*)** [Click here to enter text.](#)

**What job (type of job, hours, etc.) would be a good match?** [Click here to enter text.](#)

<b>X</b>
Person Making Referral
Date

## IPS Career Profile

*\*This tool is to be completed by the IPS specialist, typically but not always, within the first few weeks of meeting someone. During this time, the IPS specialist uses this tool to elicit conversation and learn about a consumer's preferences.*

*Sources of information include the person, the mental health treatment team, consumer records, and, with permission, family members and previous employers. The profile should be updated with each new job and education experience using job start, job end, and/or education experience forms.*

*Additional updates can be included in progress notes and/or reports for Vocational Rehabilitation. \**

### Daily Routines

**What is your daily routine?** *(Include the person's sleep hours, self-care, responsibilities, etc.)*

[Click here to enter text.](#)

**What would be a perfect day for you—including work/school?** [Click here to enter text.](#)

**What time of day do you feel your best?** [Click here to enter text.](#)

**Are there places in your neighborhood that you like to go to?** [Click here to enter text.](#)

**Do you belong to clubs, groups, a church, etc.?** [Click here to enter text.](#)

**What hobbies or interests do you have?** [Click here to enter text.](#)

### Work Goal

**What are your strengths?** *(What do you enjoy doing? What compliments have you received? How do you interact with technology?)* [Click here to enter text.](#)

**What kind of work have you always wanted to do, and what about this work that interests you?** [Click here to enter text.](#)

**What are your Top 5 Jobs that interest you and why?** [Click here to enter text.](#)

**What type of job do you think you would like to have now?** *(What appeals to you about that type of work? What job would you not want? Is there anything that worries you about working a job? What do you hope to get out of working a job?)* [Click here to enter text.](#)

**What other preferences do you have for a job?** *(What careers would you like to learn more about?)* [Click here to enter text.](#)

**How many hours per week do you want to work?** [Click here to enter text.](#)

**How many hours each day do you want to work?** [Click here to enter text.](#)

**Could you work the First, Second, or Third Shift?** [Click here to enter text.](#)

**Could you work weekends if necessary?** [Click here to enter text.](#)

**Is it important to you whether your supervisor is male or female? Please discuss and describe any preferences or concerns regarding your supervisor or coworkers.** [Click here to enter text.](#)

**Do you have two forms of Identification? (Picture ID, Social Security Card, etc.?)** [Click here to enter text.](#)

## Supports

**Who can help us think about jobs you would enjoy?** [Click here to enter text.](#)

**An appointment was made with this person to discuss jobs. If not, why?** [Click here to enter text.](#)

**What types of jobs do your friends and family members hold? What do you think about those jobs?** [Click here to enter text.](#)

**Do you know anyone working in your desired field? If so, could this person(s) be helpful in your job search?** [Click here to enter text.](#)

**Once you are employed, who would be a good person to support you? Why have you chosen this person(s)?** [Click here to enter text.](#)

**If I have trouble getting a hold of you, who would be a good person to contact to ensure you are okay and let you know about employment opportunities?** [Click here to enter text.](#)

## Adult Education N/A

*Adult Age Range: 25+*

**Are you interested in attending school or vocational training to advance your work career?** [Click here to enter text.](#)

**Tell me about your education history: High School/College/Certificate/Community College/Vocational Training?** [Click here to enter text.](#)

**How do you learn best? (By reading, listening, trying things out yourself? What subjects did you like best/least? Were you in any advanced classes? Were you recognized for anything special?)** [Click here to enter text.](#)

Did you have any accommodations in school? Yes  No

If yes, please describe the accommodation(s) received. [Click here to enter text.](#)

Do you have copies of the degrees, licenses, and certificates you earned? Please also list the dates any degree, license, or certificate was obtained. [Click here to enter text.](#)

What training, such as certificates, licenses, or degrees, will support your work goal? [Click here to enter text.](#)

What other preferences do you have for additional education or job/vocational training? [Click or tap here to enter text.](#)

Would you like assistance learning about financial aid opportunities for education programs? [Click here to enter text.](#)

### Youth/Young Adult Education N/A

*Youth Age range: 16-24 years old*

Are you currently enrolled in school or training? If yes, please tell me about it. [Click here to enter text.](#)

While in High School, did you start or complete any vocational training relevant to your current career path? Please tell me about it. [Click here to enter text.](#)

In school, what different strategies helped you learn? [Click here to enter text.](#)

Were you in any advanced classes? Which ones? [Click here to enter text.](#)

What are your strengths related to being a student? [Click here to enter text.](#)

Would you be interested in visiting some local programs (Community College, Four-year College, Adult Vocational Training) to learn about different options for degrees and certificates? If so, when would you like to do this? [Click here to enter text.](#)

### Plans for School and Training N/A

*Adult/Youth*

What do you need to start school? (Access to a computer, Computer Literacy, Quiet place to study, Transit card, etc.) [Click here to enter text.](#)

Do you have any challenges with the following:

			Comments
Being called on in class	<input type="checkbox"/> Okay	<input type="checkbox"/> Problem	Click here to enter text.
Social situations	<input type="checkbox"/> Okay	<input type="checkbox"/> Problem	Click here to enter text.
Taking tests	<input type="checkbox"/> Okay	<input type="checkbox"/> Problem	Click here to enter text.
Learning from lecture	<input type="checkbox"/> Okay	<input type="checkbox"/> Problem	Click here to enter text.
Learning by reading	<input type="checkbox"/> Okay	<input type="checkbox"/> Problem	Click here to enter text.
Learning hands-on	<input type="checkbox"/> Okay	<input type="checkbox"/> Problem	Click here to enter text.
Concentration	<input type="checkbox"/> Okay	<input type="checkbox"/> Problem	Click here to enter text.
Memory	<input type="checkbox"/> Okay	<input type="checkbox"/> Problem	Click here to enter text.
Using computers	<input type="checkbox"/> Okay	<input type="checkbox"/> Problem	Click here to enter text.

**Do you have any student debt?** Click here to enter text.

-**How much?** Click here to enter text.

-**How are your payments on the debt going?** Click here to enter text.

**Have you ever received financial aid for school? Did you receive a grant? What type? Have you ever defaulted on a grant or student loan?** Click here to enter text.

**Work Experience**  N/A – The person has no work experience.

**Favorite job**

Job title: Click here to enter text.

Employer: Click here to enter text.

Job duties: Click here to enter text.

Start Date: Click here to enter text. End Date: Click here to enter text.

How many hours per week: Click here to enter text.

How did you find this job? Click here to enter text.

What did you like about job? Click here to enter text.

What did you dislike? Click here to enter text.

What was your supervisor like? Your co-workers? Click here to enter text.

Reason for leaving job? Click here to enter text.

Who supported you, or what supports did you have for this job: Click here to enter text.

**Second favorite job**  N/A

Job title: Click here to enter text.  
Employer: Click here to enter text.  
Job duties: Click here to enter text.  
Start Date: Click here to enter text. End Date: Click here to enter text.

How many hours per week: Click here to enter text.  
How did you find this job? Click here to enter text.  
What did you like about job? Click here to enter text.  
What did you dislike? Click here to enter text.  
What was your supervisor like? Your co-workers? Click here to enter text.  
Reason for leaving job? Click here to enter text.  
Who supported you, or what support did you have for this job: Click here to enter text.

**Least favorite job**  N/A

Job title: Click here to enter text.  
Employer: Click here to enter text.  
Job duties: Click here to enter text.  
Start Date: Click here to enter text. End Date: Click here to enter text.

How many hours per week: Click here to enter text.  
How did you find this job? Click here to enter text.  
What did you like about job? Click here to enter text.  
What did you dislike? Click here to enter text.  
What was your supervisor like? Your co-workers? Click here to enter text.  
Reason for leaving job? Click here to enter text.  
Who supported you, or what supports did you have for this job: Click here to enter text.

**Another job you did not like**  N/A

Job title: Click here to enter text.  
Employer: Click here to enter text.  
Job duties: Click here to enter text.  
Start Date: Click here to enter text. End Date: Click here to enter text.

How many hours per week: Click here to enter text.  
How did you find this job? Click here to enter text.  
What did you like about job? Click here to enter text.  
What did you dislike? Click here to enter text.  
What was your supervisor like? Your co-workers? Click here to enter text.

Reason for leaving job? [Click here to enter text.](#)  
Who supported you, or what supports did you have for this job: [Click here to enter text.](#)

### Military Experience N/A

Branch: [Click here to enter text.](#)  
Dates: [Click here to enter text.](#)  
Training or work experience: [Click here to enter text.](#)  
Certificate or license: [Click here to enter text.](#)

**Do you have your DD214 (Discharge from Active Duty)?** [Click here to enter text.](#)

**Do you have any concerns regarding employment due to your military service? Is there additional information to share?** [Click here to enter text.](#)

### Cultural Background

Use the following script to introduce the next set of questions to the person:  
*“Your cultural background and story are important to help learn who you are and how employment/education fits into your life.”*

**Describe what you think about when asked about your cultural background:** [Click here to enter text.](#)

**How do you identify yourself (*race, ethnicity, gender, color, economic status*)?** [Click here to enter text.](#)

**What is important to you in terms of your background and culture? (*i.e., race, ethnicity, color, gender, economic status, etc.*)** [Click here to enter text.](#)

**Are there any cultural norms that would assist you in feeling comfortable at work/school?** [Click here to enter text.](#)

**Which languages do you speak? Which language do you prefer?** [Click here to enter text.](#)

**What special events or holidays do you celebrate? Are there family traditions or holidays that would affect work?** [Click here to enter text.](#)

**If I meet your family members/supporters, what should I know about their culture when speaking with or visiting them at home? (Example: Second language, in-person meeting, shoes at the door or outside before entering the house, introductions, eye contact, personal space, etc.)** [Click or tap here to enter text.](#)

**Have you ever felt discriminated against regarding a job or at school? Could you tell me about that?** [Click here to enter text.](#)

## Health

**Please tell me about your mental health (Medications/Side effects/Diagnosis/Current treatment, if any).** [Click here to enter text.](#)

**What helps you manage symptoms? (What helps you manage symptoms on the job, or how have you handled this in the past? How can we work together to manage symptoms on the job?)** [Click here to enter text.](#)

**How does your physical health impact you? (Doctor Note/restrictions, accommodations needed, lifting, bending, standing, sitting, climbing, reaching, etc.)** [Click here to enter text.](#)

**Some employers use drug screens while hiring. Is this a concern for you?** [Click here to enter text.](#)

**What would help you manage your MH/substance use so that you can be productive and safe at work or school?**  No concern [Click here to enter text.](#)

**Do you have trouble remembering appointments? How do you overcome this, or how can I help?** [Click here to enter text.](#)

**Do you have any concerns with concentration, and if so, how might this affect your employment?** [Click here to enter text.](#)

## Social Strengths

**What are your social strengths? (How do you work with others on a job? What are your preferences for a social environment? Describe the personality of a supervisor/teacher whom you would enjoy. What helps you to have positive interactions with others?)** [Click here to enter text.](#)



**How do you feel when you communicate with others? Have you ever struggled to communicate with your supervisor/coworkers? If so, share what was challenging about communicating with them.** [Click here to enter text.](#)

**Who are your family/supporters, and how do they feel about you going to work? Who would you call first if you got offered a job tomorrow?** [Click here to enter text.](#)

**Describe your current living situation and any goals you may have for the future living situation. (*Alone, with family, supported housing?*)** [Click here to enter text.](#)

**Benefits  N/A**

**Do you receive any of the following benefits?**

- SSI       SSDI  Housing Subsidy     Food Stamps    K-TAP
- W-Comp
- Retirement from previous job    VA benefits (combat-related?  Yes)
- Spouse or dependent child receives benefits.     UI (Unemployment Insurance)
- Medicaid    Medicare    Other benefits: [Click here to enter text.](#)
- Unsure which benefits s/he receives       Michelle P, SCL, or other waivers.
- No benefits

[Click here to enter text.](#)

**If you do not manage your finances, who handles this for you, such as a power of attorney or state guardian?**  N/A

[Click here to enter text.](#)

**Referral made to certified work incentive benefits planner** (Receiving SSI, SSDI, or both).

**Would it help if I attended the appointment with you?** [Click here to enter text.](#)

**If no referral, why not? (*An example could include not receiving SSI/SSDI benefits, choosing to complete DB101 independently, etc.*)**

[Click here to enter text.](#)

**Document the name of the Certified Work Incentive Counselor (CWIC), agency affiliation, and date(s) of appointment(s): (*In some cases, this appointment may be scheduled later. Please revisit the career profile, if possible, and update this section when the meeting is scheduled. An IPS activity note could also be used.*)**

[Click here to enter text.](#)

If the consumer receives other state or federal subsidies (*excluding SSI and SSDI*), who other than the employment specialist discussed how working would affect these benefits? (*Examples can include a case manager assisting with visiting the food stamp office or a peer specialist exploring a housing subsidy or Medicaid.*) Please provide details.

[Click here to enter text.](#)

## Preference for Sharing Personal Information (Disclosure)

Please explain that each person using IPS services can decide if their specialist will contact employers or education programs on their behalf and that they can change their mind at any time. Give examples of how their information may be shared at the beginning of this discussion.

**What could be some advantages of having an IPS specialist contact employers or education programs on your behalf?** [Click here to enter text.](#)

**What could be some of the disadvantages?** [Click here to enter text.](#)

**What can I share with an employer as your advocate? Be specific (*Some examples include hospitalization, medications, diagnosis, and accommodations*)**

[Click here to enter text.](#)

**What can I not share with an employer as your advocate? Be Specific. (*Some examples include hospitalization, medications, diagnosis, and accommodations*)**[Click or tap here to enter text.](#)

**If you decided that the specialist should not contact employers, what things would you like him or her to do to help you find a job?**

- Help with job leads
- Help filling out applications
- Help writing a resume
- Rides to job interviews
- Practicing job interview questions and answers
- Help following up on applications
- Other: [Click here to enter text.](#)

## Legal History N/A

**Are you concerned about a pre-employment screening (*legal history, substance use test, suspended license...*)?** [Click here to enter text.](#)

**Do you have any restrictions regarding where you can work or go to school?** [Click or tap here to enter text.](#)

**Do you have any pending legal charges?** Yes  No

**If yes, please explain:** [Click or tap here to enter text.](#)

**If you have a probation officer, would it be helpful to let them know you are looking for work with our program?** [Click or tap here to enter text.](#)

**Would you like help learning what is on your legal record and obtaining a copy of your record from the OVR?** [Click here to enter text.](#)

### Transportation Plan

**What is your current plan to get to and from work?** [Click here to enter text.](#)

**Do you have a backup plan to get to and from work if your primary mode of transportation fails? Do you need assistance in developing a backup transportation plan?** [Click here to enter text.](#)

**Do you have any concerns about arriving at work on time? If so, what are your concerns, and has this been a barrier for you in the past?** [Click here to enter text.](#)

**How far are you willing to travel for work? (*20+ miles from home, only travel within your county*)** [Click here to enter text.](#)

### Additional Information

**Have you talked with treatment team members, family members, and supporters of the individual? Please provide any additional information regarding conversations with the consumer's support team.** [Click or tap here to enter text.](#)

**Have you conducted career exploration with the consumer in the community? Please describe these activities and your findings as they relate to the vocational goal identified in this report and on the job search plan.** [Click or tap here to enter text.](#)

**Suggested Employment Goal(s):** [Click here to enter text.](#)

\_\_\_\_\_ Date: \_\_\_\_\_

Staff Signature

\_\_\_\_\_ Date: \_\_\_\_\_  
Job seeker/student signature

# BASIC TIPS TO GET STARTED

## QUESTIONS TO ENGAGE JOB SEEKER

How did you get here today?

So tell me about your morning.

What jazzes you about going to work/school?

How might being employed change your life?

What do people say you are good at?

What activity have you noticed makes you lose track of time?

What do you want life to look like in 3 years?

When was the last time you felt good? What would it take to reach that again?

With whom do you like to spend time?

What would be the smallest or easiest 1<sup>st</sup> step for you?

Imagine that you are *truly confident* that others will support you. What might you do?

What do you think you are good at? What makes you unique?

If you could talk to your future self, what would you say?

When do you feel most like your true self?

- **Complete profile** within **first few weeks** of meeting with new person.
- **Explain that the various questions** being asked are helpful for understanding the person's interests, strengths, uniqueness, culture, and experiences. Answers **help with planning together** for the best job or educational pursuits.



- **DISCLOSURE:** **Remember to explain** that the person can decide whether or not the IPS specialist will contact employers on job seeker's behalf AND this **decision can be changed** at any time.

## Show Belief. Highlight Possibilities.

Develop your own creative questions that demonstrate belief in the person and in possibilities.



**Bring people into the future by asking questions that energize and inspire hope.**

Focusing on the past too much can hold people back and may get boring.



**Action steps increase hope, confidence, and engagement.**

Gather information while being active in the community.

Develop & review action steps at each meeting.

Meet as frequently as possible to keep momentum.

*Remember to record frequently and share with job seeker and team!*

# Job Search Plan

## Contact Information

Organization:

Date:

Employment Specialist:

Phone Number:

Consumer Name:

Case Number:

OVR Counselor:

---

## Consumer Goals

Consumer Career Goals, Job Preferences (*In Consumer's own words*):

Consumer Strengths Related to Career Goals:

---

### Objective #1:

Person Responsible:

Frequency:

Target Date:

### Objective #2:

Person Responsible:

Frequency:

Target Date:

### Objective #3:

Person Responsible:

Frequency:

Target Date:

### Objective #4:

Person Responsible:

Frequency:

Target Date:

---

Employment Specialist Signature/Date: \_\_\_\_\_

*By electronically signing this form, the Employment Specialist verifies that the Consumer has full knowledge and agrees with this plan.*

**BASIC INFORMATION**

Individual Name	Counselor Name
Provider Name	Employment Specialist Name
Vocational Goal	Total Billable Hours for this activity

Please Note: only direct service to the Individual is considered billable.

Direct service is time spent with the Individual or on behalf of the Individual. Attempt to contact the Individual, transportation time to meet the Individual, etc., are not considered billable.

**ACTIVITY**

Date of Activity	Exact time activity took place
Activity Description	

## RESULTS

What was learned

Does this activity end with the Individual securing employment? (Choose one)

Is the Individual still satisfied with their vocational goal? (Choose one)

Does the vocational goal need to be amended? (Choose one)

If yes, provide an explanation as to why the vocational goal needs to be amended?



If the vocational goal needs to be amended, the counselor must be notified within 2 business days.

Other important information

## NEXT STEPS

What would you like to learn more about?
When and where will the next activity take place?

Submit to the OVR Counselor by the 5<sup>th</sup> of each month.

The Kentucky Office of Vocational Rehabilitation does not discriminate on the basis of race, color, national origin, sex, age, religion, disability, genetic information, marital status, sexual orientation, gender identity or expression, veteran status, pregnancy or affiliated medical condition, marital or familial status, or any other status protected by applicable law.

# Kentucky Office of Vocational Rehabilitation

## OVR SE 2-Job Development Activity Note

### Instructions

The purpose of this form is to record information about the individual's job development and the work that the employment specialist is doing in this area.

#### Basic Information

<b>Individual Name</b>	Enter the first and last name of the individual.
<b>Counselor Name</b>	Enter the first and last name of the counselor.
<b>Provider Name</b>	Enter the name of the CRP providing the services.
<b>Employment Specialist Name</b>	Enter the first and last name of the employment specialist from the CRP.
<b>Vocational Goal</b>	Enter the vocational goal for the individual.
<b>Total Billable Hours</b>	Enter the billable hours for this month.

Please note: Only direct service to the individual is considered billable. Direct service is time spent with the individual or on behalf of the individual. Attempt to contact the individual, transportation time to meet the individual, etc., are not considered billable.

#### Activity

<b>Date of Activity</b>	Select the month, day, and year or manually enter the date of the job development activity using MM/DD/YYYY format.
-------------------------	---------------------------------------------------------------------------------------------------------------------

**Exact time activity took place**

Enter the time the activity took place.  
Be as exact and specific as possible.

**Activity Description**

Enter a description of the activity. Be as detailed as possible.

**Results**

**What was learned**

Enter what was learned as a result of the activity above.

**Does this activity end with the individual securing employment? (Choose one)**

Select whether the activity ended with the individual securing employment.

**Is the individual still satisfied with their vocational goal? (Choose one)**

Select whether the individual is still satisfied with their vocational goal.

**Does the vocational goal need to be amended? (Choose one)**

Select whether or not the vocational goal needs to be amended or changed.

**If yes, provide an explanation as to why the vocational goal needs to be amended?**

Enter an explanation as to why the vocational goal needs be amended.

If the vocational goal needs to be amended, the counselor must be notified within 2 business days?

**Other important information**

Enter any other important information that is not already on the form.

## Next Steps

**What would you like to learn more about?** Enter what else you need to learn to assist in acquiring employment.

**When and where will the next activity take place?** Enter the time and place of the next activity. Be as specific as possible.

Submit this form to the OVR Counselor by the 5<sup>th</sup> of the month.

**BASIC INFORMATION**

Name of individual	Counselor Name
Provider Name	Employment Specialist Name
Number of hours the Individual works monthly	Estimated hours needed monthly for on and off site supports

**EMPLOYMENT INFORMATION**

Employed/Start Date	Days working per week	Hours working per week
Hourly Wages/Salary	Does this wage qualify for a CRP Bonus Payment (Choose one)	
Employer		
Employer Address		
Supervisor/Contact Person		
Job Description Attached (Choose one)		
If no, please give a description of the job		

Does the job match the Individual's IPE goal? (Choose one)

--

If no, contact the counselor to discuss an amendment.

Does this job match the individual's interests? (Choose one)

--

If no, explain why this job was acquired for the individual?

--

Employer Benefits (list all that apply)

--

Is the employer paying at least 51% of medical insurance? (Choose one)

--

## SUPPORT INFORMATION

What on-site supports do you plan to provide to the Individual?

--

What off-site supports do you plan to provide to the Individual?

--

How do you plan to identify natural supports?

--

Other important information

Submit to the OVR Counselor immediately upon completion. It is due no later than the close of business the same day. If there are extenuating circumstances, then it is due no later than close of business the next day.

The Kentucky Office of Vocational Rehabilitation does not discriminate on the basis of race, color, national origin, sex, age, religion, disability, genetic information, marital status, sexual orientation, gender identity or expression, veteran status, pregnancy or affiliated medical condition, marital or familial status, or any other status protected by applicable law.

# Kentucky Office of Vocational Rehabilitation

## OVR SE 3-Job Acquisition Report

### Instructions

The purpose of this form is to record information about the consumer's job once they obtain it.

#### Basic Information

<b>Consumer Name</b>	Enter the first and last name of the consumer.
<b>Counselor Name</b>	Enter the first and last name of the counselor.
<b>Provider Name</b>	Enter the name of the CRP providing the services.
<b>Employment Specialist Name</b>	Enter the first and last name of the employment specialist from the CRP.
<b>Number of hours the consumer works monthly</b>	Enter the number hours that the consumer works each month.
<b>Estimated hours needed monthly for on and off site supports</b>	Enter the estimated hours that the employment specialist needs each month for on and off site supports.

#### Employment Information

<b>Employed/Start Date</b>	Enter the month, day, and year or manually enter the date using MM/DD/YYYY format that the consumer was employed and/or started the job.
----------------------------	------------------------------------------------------------------------------------------------------------------------------------------



**Days working per week**

Enter the number of days the consumer is expected to work each week.

**Hours working per week**

Enter the number of hours the consumer is expected to work each week.

**Hourly Wages/Salary**

Enter the wages per hour or the salary per year for the consumer.

**Does this wage qualify for a CRP Bonus Payment? (Choose one)**

Select whether this wage qualifies for a CRP Bonus Payment.

**Employer**

Enter the name of the employer.

**Employer Address**

Enter the address of the employer.

**Supervisor/Contact Person**

Enter the name of the consumer's supervisor or a contact person with the employer.

**Job Description Attached (Choose one)**

Select whether the job description of the consumer is attached to this form.

**If no, please give a description of the job**

If the employment specialist doesn't have a job description, write a good description of the job.

**Does the job match the consumer's IPE goal? (Choose one)**

Select whether the job matches the consumer's IPE goal.

If no, contact the counselor to discuss an amendment.

**Does this job match the consumer's interests?**

Select whether the job matches what the consumer is interested in.

**If no, explain why this job was acquired for the consumer?**

If the job doesn't match what the consumer is interested in, explain why this job was pursued and acquired for the consumer.

**Employer Benefits (list all that apply)**

Enter all the employer benefits for the job.

**Is the employer paying at least 51% of medical insurance? (Choose one)**

Select whether the employer is paying at least 51% of the medical insurance for the consumer.

### **Support Information**

**What on-site supports do you plan to provide to the consumer?**

Enter the on-site supports that the employment specialist plans to provide to the consumer.

**What off-site supports do you plan to provide to the consumer?**

Enter the off-site supports that the employment specialist plans to provide to the consumer.

**How do you plan to identify natural supports?**

Enter how the employment specialist plans to identify natural supports on the job?

**Other important information**

Enter any other important information not covered on the form. Please do not be repetitive.

Submit this form to the OVR counselor when it is complete.

# Job Support Plan

## Contact Information

Organization:

Date:

Employment Specialist:

Phone Number:

Consumer Name:

Case Number:

OVR Counselor:

Employer:

---

## Job Information

Consumer's Job Title and Description of Duties:

Disclosure. Will the Employment Specialist have contact with Supervisor? If so, how often and what type:

---

## Job Support

Job Support Need #1:

Detailed plan:

Job Support Need #2:

Detailed plan:

Job Support Need #3:

Detailed Plan:

Job Support Need #4:

Detailed Plan:

---

## Additional Supports

List additional support such as Family Member or Case Manager and how they will help.

Person:

Role:

Person:

Role:

Person:

Role:

---

## Notes

Any notes not listed above, necessary for the continued employment of the Consumer:

---

Employment Specialist Signature/Date: \_\_\_\_\_

*By electronically signing this form, the Employment Specialist verifies that the Consumer has full knowledge and agrees with this plan.*

**BASIC INFORMATION**

Individual Name	Individual Date of Birth
Counselor Name	Provider Name
Employment Specialist Name	Total billable hours
Date	

For the purpose of this document, and in accordance with the Supported Employment (SE) Service Fee Memorandum (SFM), supported employment services are viewed as intensive, ongoing support services provided to an individual after they begin employment. These services are needed to assist the individual in performing their work, which leads to stable and sustainable competitive integrated employment. Examples of such supports include, but are not limited to, the following: job coaching or training, routine contacts (e.g., employer, consumer, supervisor, etc.), orientation, problem-solving (with transportation, clothing, hygiene, soft skills), crisis management, career advancement (e.g., increasing work hours, promotions, or additional trainings).

**SERVICE**

Were services provided on this date performed onsite, offsite, or both? (Please choose)

What support services did you provide?

## RESULTS

What feedback did you receive from the employer about the individual's work performance?

What did you learn about the individual's job performance, employer, employment site?

How is the individual achieving stability on the job?

What does the individual need to perform their work more independently?

How are you reducing your presence on the job site?

What steps were taken to increase natural supports on the job?

What additional information or insight was obtained?

## NEXT STEPS

When will you provide the next service?

Do you feel the **individual** has reached stability on the job? (Choose one)

If the individual has achieved stability, then complete the Extended Services Plan and update the Employment Stability Assessment form and submit to the OVR Counselor. Submit this form to the counselor by the 5th of each month.

**Non-Discrimination Statement:**

The Kentucky Office of Vocational Rehabilitation does not discriminate on the basis of race, color, national origin, sex, age, religion, disability, genetic information, marital status, sexual orientation, gender identity or expression, veteran status, pregnancy or affiliated medical condition, marital or familial status, or any other status protected by applicable law.

# Kentucky Office of Vocational Rehabilitation

## OVR SE 4-Supported Employment Services Note

### Instructions

For the purpose of this document, and in accordance with the Supported Employment (SE) Service Fee Memorandum (SFM), supported employment services are viewed as intensive, ongoing support services provided to an individual after they begin employment. These services are needed to assist the individual in performing their work, which leads to stable and sustainable competitive integrated employment. Examples of such supports include, but are not limited to, the following: job coaching or training, routine contacts (e.g., employer, individual, supervisor, etc.), orientation, problem-solving (with transportation, clothing, hygiene, soft skills), crisis management, career advancement (e.g., increasing work hours, promotions, or additional trainings).

#### Individual Name

Enter the first and last name of the individual.

#### Individual Date of Birth

Select the month, day, and year for the date of birth for the individual or manually enter the date using MM/DD/YYYY format

#### Counselor Name

Enter the first and last name of the Office of Vocational Rehabilitation (OVR) Counselor.

#### Provider Name

Enter the name of the Community Rehabilitation Provider (CRP) that is completing the supported employment note.

#### Employment Specialist

Enter the first and last name of the employment specialist who is completing the supported employment note.



**Total Billable Hours for this activity**

Enter the total billable hours for this activity. Enter the total billable hours that you provided for on-site and off-site support.

**Date**

Select the month, day, and year of the date the service was provided or manually enter the date the service was provided using MM/DD/YYYY format. There can only be one note for one date of service. Multiple dates of service cannot be included on one note.

**Service**

**Were services provided on this date performed onsite, offsite, or both? (Choose one)**

Select onsite, offsite, or both.

**What support services did you provide?**

Enter the support services that you provided.

**Results**

**What feedback did you receive from the employer about the individual's work performance?**

Enter the feedback received from the employer about how the individual performed on the job. Be as detailed and specific as possible and make this section a priority.

**What did you learn about the individual's job performance, employer, employment site?**

Enter what you learned about the individual's job performance, the employer, and the site itself. Be as specific and detailed as possible.

**How is the individual achieving stability on the job?**

Enter how the individual is becoming more stable on the job. Be specific.

**What does the individual need to perform their work more independently?**

Enter what the individual needs to be more independent on the job. Be specific.

**How are you reducing your presence on the job site?**

Enter how you are reducing or phasing out your presence on the job site?

**What steps were taken to increase natural supports on the job?**

Enter what you are doing to create those natural or built-in supports on the job.

**What additional insight or information was obtained?**

Enter any more information that was obtained. Please be specific and not repetitive.

### **Next Steps**

**When will you provide the next service?**

Enter the timetable for the next service.

**Do you feel the individual has reached stability on the job? (Choose one)**

Select whether the individual has reached stability on the job.

If the individual has achieved stability, then complete the Extended Services Plan and update the Employment Stability Assessment form and submit to the OVR Counselor. Submit this form to the counselor by the 5<sup>th</sup> of each month.

**SUPPORTED EMPLOYMENT SERVICES PROVIDED**

Purpose for this report		
Hours on-site	Hours off-site	Total hours of support

**BASIC INFORMATION**

Individual Name	Date
Job Title	Employment Specialist
Date of Employment	Provider Name
Place of Employment	OVR Counselor
Average hours working per week	Month of Assessment
Days Employed	First Day of Employment Stability

Ongoing support services as provided during supported employment is to include an assessment of employment stability. Please complete and submit this form to the OVR Counselor by the 5<sup>th</sup> of each month after the individual starts work until transitioned to Extended Services. 34 CFR 361.5(c)(37)(iv)

Employment stability can be characterized by one’s independence in successfully performing job duties either with or without natural supports, but without continuing to need intensive support from the Employment Specialist. Questions 1-6 assist in making this determination.

## QUESTIONS RELATED TO EMPLOYMENT STABILITY

1. Is the individual satisfied with employment (e.g., job tasks, number of hours)? (Choose one)

If not, what are the specific concerns and how can the situation be resolved?

2. Is the acquired job consistent with the individual's strengths, abilities, interests, and informed choice? (Choose one)

3. Does the individual's job performance meet the expectations of the employer? (Choose one)

If yes, provide information verifying your response.

If not, what is/are the specific concern(s) and how will this be resolved?

4. Are natural supports appropriate and in place? (Choose one)

If yes, what are the specific natural supports that are in place?

If not, what are your next steps to establish appropriate natural supports?

5. Are all necessary accommodations appropriate and in place? (Choose one)

If not, what accommodations does the individual need in order to maintain employment?

6. Is the individual at the point of not requiring any further intensive supported employment services in order to perform their work? (Choose one)

If not, what specific services are required?

## ADDITIONAL QUESTIONS

Please answer the following questions.

Is the job consistent with the Person-Centered Employment Plan (PCEP)/Career Profile/Vocational Profile? (Choose one)

If the job is not consistent with the Person-Centered Employment Plan (PCEP)/Career Profile/Vocational Profile, the counselor must be contacted immediately to resolve the discrepancy and make certain the IPE or IPE amendment reflects the current type of employment, as appropriate.

Has competitive integrated employment been achieved? (Choose one)

Have any existing conflicts or concerns with benefits (i.e., SSI/SSDI) due to employment been resolved? (Choose one)

If not, what is/are the issue(s)? How will this be resolved?

Since employed, has the level of support you have provided decreased? (Choose one)

If not, what is/are the issue(s)? How will this be resolved?

Since employed, has the individual's hours on the job remained stable or increased? (Choose one)

If hours have decreased, what is/are the reason(s) for this?

## STABILITY RATING SCALE

Scale of 1 to 10 with 1 indicating the Individual has been dismissed from the job due to performance and 10 indicating the Individual is stable on the job and can transition to Extended Services after demonstrating sustained stability.

Directions: Considering the information recorded above in questions 1-6, please make a rating as to the individual's current stability on the job. If all six questions are answered yes, select the number 10.

Select the number that best reflects the individual's current level of stability. (Choose one)

If the rating is 9 or below, what keeps it from being a higher rating and what is the plan for achieving employment stability?

If the rating is lower than last month's rating, please provide reason(s) for the change.

During the Supported Employment Services period this form is to be completed monthly and submitted by the 5<sup>th</sup> of each month. It should accompany Supported Employment Services notes when sent to the OVR Counselor.

This form is to be completed and submitted to the OVR Counselor along with the Extended Services Plan at the time the consumer has achieved **sustained** stability on the job. Sustained stability refers to consistent successful job performance over time, with or without natural supports, but without continuing to need intensive supported employment services from the employment specialist. The timeframe for determining whether an individual has consistently performed job duties successfully will vary from individual to individual. An individual working full time might require a couple of weeks to make this determination whereas an individual working 5 to 10 hours weekly would likely require more time to make this judgment.

The Kentucky Office of Vocational Rehabilitation does not discriminate on the basis of race, color, national origin, sex, age, religion, disability, genetic information, marital status, sexual orientation, gender identity or expression, veteran status, pregnancy or affiliated medical condition, marital or familial status, or any other status protected by applicable law.

# Kentucky Office of Vocational Rehabilitation

## OVR SE 5-Employment Stability Assessment Form

### Instructions

The purpose of this form is to assess the stability of the individual on the job.

### Supported Employment Services Provided

#### Purpose of this Report

Select why this report is being done.

What was the amount of time spent providing supported employment services either on-site and/or off-site this past month?

If you put in the hours on-site and off-site, the form should automatically add up the total hours.

#### Hours On-site

Enter the number of hours spent on-site providing support.

#### Hours Off-site

Enter the number of hours spent off-site providing support.

#### Total Hours of Support

Enter the total hours of support that were spent this month.

#### Days Employed

Enter the days the individual works.

#### First Day of Employment Stability

Select the month, day, and year or manually enter the first day of employment stability using the MM/DD/YYYY format. This date represents the date that the individual should be transitioned to extended employment.



## Basic Information

<b>Individual Name</b>	Enter the first and last name of the Individual.
<b>Date</b>	Select the month, day, and year of the assessment or manually enter the date of the assessment using MM/DD/YYYY format.
<b>Job Title</b>	Enter the individual's job title.
<b>Employment Specialist Name</b>	Enter the first and last name of the employment specialist from the CRP.
<b>Date of Employment</b>	Select the month, day, and year or manually enter the date of the individual's employment using MM/DD/YYYY format.
<b>Provider Name</b>	Enter the name of the provider of supported employment services or CRP.
<b>Place of Employment</b>	Enter the place that the individual works or their place of employment.
<b>OVR Counselor</b>	Enter the first and last name of the OVR Counselor.
<b>Average hours working per week</b>	Enter the average number of hours the individual works each week.
<b>Month of Assessment</b>	Enter the month of this assessment.

Ongoing support services as provided during supported employment is to include an assessment of employment stability. Please complete and submit this form to the OVR Counselor by the 5th of each month after the individual starts work until transitioned to Extended Services. 34 CFR 361.5(c)(37)(iv)

Employment stability can be characterized by one's independence in successfully performing job duties either with or without natural supports, but without continuing to need intensive support from the Employment Specialist. Questions 1-6 assist in making this determination.

## **Questions related to Supported Employment Services/Individual Employment**

Please answer the following questions.

**Is the individual satisfied with the work (e.g., job tasks, number of hours) (Choose one)**

Select whether the individual is satisfied with the work.

**If not, what are the specific concerns, and how can they be resolved?**

If no is selected above, what are the specific concerns of the individual with the job, and how can they be resolved?

**Is the acquired job consistent with the individual's strengths, abilities, interests, and informed choice? (Choose one)**

Select whether the job acquired is consistent with the individual's strengths, abilities, interests, and informed choice.

**Is the job consistent with the Person-Centered Employment Plan (PCEP)/Career Profile/Vocational Profile?**

Select whether the job is consistent with the assessments given.

If the job is not consistent with the Person-Centered Employment Plan (PCEP)/Career Profile/Vocational Profile, the counselor must be contacted immediately to resolve the discrepancy and make certain the IPE or IPE amendment reflects the current type of employment, as appropriate.

**Has competitive integrated employment been achieved? (Choose one)**

Select whether competitive integrated employment has been achieved.

**Have any existing conflicts or concerns with benefits (i.e., SSI/SSDI) due to employment been resolved? (Choose one)**

Select whether any conflicts or concerns with the individual's benefits due to their employment have been resolved. For example, the benefits could be SSI or SSDI.

**If not, what is/are the issues? How will this be resolved?**

Please discuss how these conflicts or concerns with benefits will be addressed and dealt with if the haven't already.

**Since employed, has the level of support decreased?**

State whether the individual's support has gone down since they started working.

**If not, what is/are the issue(s)? How will this be resolved?**

State the issues if support hasn't decreased and how this issue will be resolved.

**Since employed, has the individual's hours on the job remained stable or increased? (Choose one)**

State if the individual's hours on the job remained stable or increased since the individual starting working.

**If hours have decreased, what is/are the reason(s) for this?**

If hours of work per week have gone down, what is/are the reason(s) for this decrease?

### **Rate Change**

Directions: Scale of 1 to 10 with 1 indicating the individual has been dismissed from the job due to performance and 10 indicating the individual is stable on the job and can transition to Extended Services after demonstrating sustained

stability. Considering the information recorded above in questions 1-6, please make a rating as to the individual's current stability on the job. If all six questions are answered yes, select the number 10.

**Select the number that best reflects the individual's current level of stability? (Choose one)**

Select a number 1 through 10 that best reflects the individual's current level of stability.

**If the rating is 9 or below, what keeps it from being a higher rating and what is the plan for achieving employment stability?**

State what keeps the rating from being 10 and the plan for getting it to this level.

**If the rating is lower than last month's rating, please provide reason(s) for the change?**

State reason for the change if the rating is lower than last month.

During the Supported Employment Services period this form is to be completed monthly and submitted by the 5th of each month. It should accompany Supported Employment Services notes when sent to the OVR Counselor.

This form is to be completed and submitted to the OVR Counselor along with the Extended Services Plan at the time the consumer has achieved **sustained** stability on the job. Sustained stability refers to consistent successful job performance over time, with or without natural supports, but without continuing to need intensive supported employment services from the employment specialist. The timeframe for determining whether an individual has consistently performed job duties successfully will vary from individual to individual. An individual working full time might require a couple of weeks to make this determination whereas an individual working 5 to 10 hours weekly would likely require more time to make this judgment.

**BASIC INFORMATION**

Please choose if this is an authorization for Day 1, Day 45, or Day 90. (Choose one)

--

If this person will receive extended services funded by a Medicaid waiver, this plan needs to be developed by the individual’s team.

All Extended Services Plans must be reviewed, approved, and signed by the OVR Counselor. The plan is due by the close of business the same day of its completion. If there are extenuating circumstances, then it is due no later than the close of business the next day.

Provider Name	Name of individual
Employer	Job Title or Function
Wage per hour	Average hours per week
The consumer is 24 years old or younger (Choose one)	

**QUESTIONS RELATED TO EXTENDED SERVICES**

Answer the questions with as much detail as you can obtain. Be as specific as you can with your answers.

Frequency and Description of On-Site Extended Services-What if anything, do you do with or for the employee regarding job tasks? (For example, is job coaching still being provided? If so, provide details.) How have you shifted these tasks to the employee and/or natural supports? How often, and in what way, will you follow-up with employee and employer?

Frequency and Description of Off-Site Extended Services-Provide the name, title/role, frequency, and detailed description of the type of support being provided. For example: transportation assistance at home, medication management, benefits analysis, SSA reporting, therapies, offsite follow-up by the Employment Specialist.

Description of Natural Supports on the job-Provide the name, title/role, frequency, and detailed description of the type of support being provided.



Other Important Information-Anything else that may be needed to support the employee, for example: safety concerns, criminal history expungement, special medication considerations, etc.

Consumer's Future Employment Goals-These should be person-centered and will change over time. Examples include developing relationships at work, increasing efficiency, taking on new tasks, increasing hours, career advancement, etc. (What strategies have you used, and will you continue to use to address the examples listed?)

How was input obtained for this plan? (Provide detailed information pertaining to those involved. This should include any information provided by others and how it was used in the completion of this plan.)  
Name of role of those involved-employee, employment specialists, guardian, other support people, team members, etc.

Number of Hours requested for extended services over the next 45 days.
Justification of hours requested

Employment Specialist Signature

Date

**OVR USE ONLY-COUNSELOR REVIEW**

Verified that the employment is consistent with the individual’s strengths, abilities, interests, and informed choice, and stable employment in a competitive integrated setting has been achieved? (Choose one)
Verified that supported employment services documentation has been provided by the CRP and support the transition to extended services? (Choose one)
Reviewed and approve the Extended Services Plan? (Choose one)
Expected Start Date for Extended Services

OVR Counselor

Date

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# Kentucky Office of Vocational Rehabilitation

## OVR SE 7-Extended Services Report

### Instructions

The purpose of this form is to record information related to extended services for the Individual. Please pay attention to the important reminders on the form and in the instructions.

**Individual Name**

Enter the first and last name of the Individual.

**Counselor Name**

Enter the first and last name of the counselor.

**Provider Name**

Enter the name of the CRP providing the services.

**Employment Specialist Name**

Enter the first and last name of the employment specialist from the CRP.

**Is this Individual between the ages of 14 and 24? (Choose one)**

Select whether the Individual is between the ages of 14 and 24.

**If yes, have you requested an authorization for Extended Services for youth? (Choose one)**

Select whether an authorization has been requested for Extended Services for youth? Please answer no if the answer to the previous question was no.

**Is the individual's employment stable? (Choose one)**

Select whether the individual's employment is stable.

**If no, how will you assist the individual in obtaining employment stability.**

State how the individual will be assisting in obtaining employment stability if answer above is no. Also, contact the counselor.

**Ongoing supports will be provided (Choose one)**

Select whether ongoing supports will be provided.

**Total billable hours for Extended Services for youth.**

Enter the total billable hours for Extended Services for youth for the month if the Individual is a youth, ages 14-24.

Reminder

If the Individual is a youth (ages 14-24), then enter the total billable hours.

Extended services are to be provided throughout the duration of the individual's employment.

Extended services are required, at a minimum, 2 times per month for each Individual in supported employment.

The twice a month mandate must be conducted at the worksite with the individual.

Exceptions to extended services requirements must be reflected in the Step-Down Support Plan and submitted to and approved by the OVR CRP Branch.

## **Description and Schedule of Extended Services provided for the month**

Please enter the date, hours, activity, and result for each service that was provided for the month. Give as much detail as possible for the result.

**Use this space if additional dates, times, activities, and results have been provided**

Enter any additional dates, times, activities, and results that have been provided that were not mentioned above.

**Number of hours**

Enter the number of hours for the month.

**Date Completed**

Enter the date that the report was completed.

Submit to OVR by the 5<sup>th</sup> day of the subsequent month to the OVR Counselor.

## Step Down Support Instructions and Guidelines

Step Down Support is a process that is designed to reflect the independence, skills and natural supports obtained by the individual while in a competitive and integrated job, by providing long-term supports in a manner that is specific to the needs of the individual.

For approval of Step Down Supports, submit the below form to your area consultant. Contacts are listed below.

- Only supported employees who have been employed at the same job for 12 months will be eligible for Step Down Supports.
- Submittal of the form does not guarantee approval of Step Down Supports. All forms must be filled out in their entirety, complete with summary of progress and required signatures. Once a form is signed by the consultant and returned to the agency, the person has been approved for step down supports.
- You need to keep the signed approval form as well as documentation supporting your timed commitment in your agency files. OVR may request documentation, preform chart audits, and contact supported employees and/or employers participating in Step Down Support at any time.
- Long-Term Support notes must include: Name, Date, Frequency of (SDS date, length of time to follow up) Ex: Ashley Taylor SDS 11/1/17: Every other month)

If an individual in Step Down Supports experiences issues and needs assistance, you must provide the service immediately and remove the person from step down supports until the consumer is stable at the job site for a minimum of 6 months. At that time, you may submit a new Step Down Support Agreement.

Ron O'Hair, Branch Manager  
1225 US 60W, Suite 106, Morehead, KY 40351  
606-780-2287  
606-783-8620 FAX  
606-207-7233 CELL  
[RonnieL.O'Hair@ky.gov](mailto:RonnieL.O'Hair@ky.gov)

Gloria Gibson, Consultant  
Daniel Boone Community Action  
1535 Shamrock Road, Manchester, KY 40962  
606-595-4330 FAX  
606-280-1070 CELL  
[Gloria.Gibson@ky.gov](mailto:Gloria.Gibson@ky.gov)

Ashley Taylor, Consultant  
92 Chestnut Street, Murray, KY 42071  
502-292-8390 CELL  
[AshleyD.Taylor@ky.gov](mailto:AshleyD.Taylor@ky.gov)



## Office of Vocational Rehabilitation Step Down Support Agreement

Supported Employment Provider		Date
Employee	Employer	
Guardian (if applicable)		Hire Date

Supported Employment Provider is requesting to place the above named Employee in Step Down Supports. The employee has been on their current job site with minimal issues for \_\_\_\_\_ year(s) \_\_\_\_\_ month (s).

Supporting documentation for the above requirements are maintain in agency files. With approval from OVR, the provider will continue to follow up with employee and employer at a minimum of every \_\_\_\_\_. The employee and employer agree to this change and have been given a copy of this agreement with the contact information of the Employment Specialist below. All parties have been informed that if an issue or need should arise that they can contact the Employment Specialist at any time. If the employee needs assistance during the step down support time they will be removed from Step Down Supports and worked with immediately. At any time, anyone below can request assistance on the job site and the provider is required to assist however is needed.

\_\_\_\_\_  
Employee Signature, Date

\_\_\_\_\_  
Guardian Signature (if applicable), Date

\_\_\_\_\_  
Employment Specialist Signature, Date

\_\_\_\_\_  
Employment Specialist Contact Number

\*Approved for Step Down Supports: \_\_\_\_\_  
OVR SE Consultant Signature, Date

**REQUIRED: Summary of Supported Employee's Progress (see Page 3)**

## Summary of Supported Employee's Progress

Date placed in Step Down Supports: \_\_\_\_\_

Frequency of Support: \_\_\_\_\_

Describe how employment is independent and stable:

## IPS Services Transition Plan

You have decided to discontinue IPS services. But remember that you are welcome to return to IPS if you think you would benefit from job supports or career development in the future. This guide is meant to support your decision and help you to plan ongoing supports.

**What are your future plans? What is your short-term goal? What is your long-term goal?**

**If you had to make a big decision today who would you call? Who have you called in the past?**

**Who can help with your career goals?**

	Y or N	Name of Support(s) Preferred	Contact Information
My case manager			
My therapist			
My family			
My friend			
My significant other			
Clergy			
Benefits Planner			
Other			

**Should we schedule a meeting with any of your supports to discuss the transition?**

**If you are employed, how often do you want someone to check in with you about your job? Who should check in with you?**

**If you are leaving IPS unemployed, when would be a good time to ask you about returning to IPS for help with employment or education? Who should contact you?**

**How would you like to be contacted?**

- |                                             |                                            |                                          |
|---------------------------------------------|--------------------------------------------|------------------------------------------|
| <input type="radio"/> In-person (community) | <input type="radio"/> In-person (job site) | <input type="radio"/> In-person (agency) |
| <input type="radio"/> Phone call            | <input type="radio"/> Text                 | <input type="radio"/> Email              |

**What are some tools/coping strategies you use or have used in the past on the job to manage stress?**

**How would you know if you started to feel dissatisfied with your job or that you were having other problems?**

**What are some reasons to re-connect to IPS in the future?** (Help leaving current job, help finding a new job, help advocating for a promotion or raise, assistance with training or education, benefits planning, etc.)

*Remember, that increases in pay/work hours may affect your benefits. And if you quit working that can also affect your entitlements. If you experience a change in wages, contact a benefits planner to learn more.*

**Benefits planner contact information:** \_\_\_\_\_

Your signature/date: \_\_\_\_\_

IPS specialist signature/date: \_\_\_\_\_ Other signature/date: \_\_\_\_\_

## Job End Report

### Information about the Job:

Job Title: \_\_\_\_\_ Employer: \_\_\_\_\_

Job Start Date: \_\_\_\_\_ Job End Date: \_\_\_\_\_

Changes in job duties, work schedule, supervision, or other changes since job start:

\_\_\_\_\_  
\_\_\_\_\_

### Reason for job end:

Quit for a better job  Quit—illness related  Quit for another reason  Terminated

Client's perspective regarding job end: \_\_\_\_\_

\_\_\_\_\_

Staff comments regarding job end: \_\_\_\_\_

\_\_\_\_\_

Employer comments: \_\_\_\_\_

\_\_\_\_\_

Type of support provided: \_\_\_\_\_

\_\_\_\_\_

Does person wish to look for another job/what kind? \_\_\_\_\_

\_\_\_\_\_

Client's preferences regarding disclosure on next job: \_\_\_\_\_

\_\_\_\_\_

Who will report the first pay check to Social Security Administration? \_\_\_\_\_

N/A—the person does not receive Social Security benefits

\_\_\_\_\_  
Employment specialist signature

\_\_\_\_\_  
Date

The IPS Employment Center

Rockville Institute, Westat

June 2010, Revised March 2014, Revised April 2017, Revised January 2018

**「SAMPLE」**

*Refer to the IPS state trainers for sample documentation for each IPS documentation form.*

### Sample Education Plan

Person's goal: "I'm interested in something in the medical field, but I don't want to spend more than a year in school. I am thinking about becoming a dental hygienist but am not sure if there are other options I would like."

Goal	Objectives	Person(s) responsible:	Frequency:	Target date:
Julio will decide upon a program that matches his interests and will apply to a school.	Julio and IPS specialist will meet with Vocational Rehabilitation counselor to learn about jobs in the medical field that require no more than a year of training.	Julio Lisa Sabin John Edwards	1-2 times	January 2025
	Julio and IPS specialist will visit the community college to meet with an academic advisor to learn about the short-term medical degrees/certifications offered.	Julio Lisa Sabin	Once	February 2025
	Julio and IPS specialist to meet with at least two people working in in different jobs that interest Julio.	Julio Lisa Sabin	At least twice	March 2025
	Julio will apply to the Lakeland Community College.	Julio Lisa Sabin	Once	April 2025
	Julio and IPS specialist will complete the Free Application for Federal Student Aid.	Julio Lisa Sabin	Once	April 2025
	Julio will take placement tests at the community college. IPS specialist will help Julio learn about workshops to prepare for tests and how to register for the tests.	Julio Lisa Sabin	Once	June 2025

\_\_\_\_\_  
IPS specialist signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Student signature

\_\_\_\_\_  
Date

Tips for Employer Relationship Building:  
A Guide for IPS Supported Employment Specialists



*Developed by:*

*Sarah Swanson, Dartmouth PRC; Jerry Wood, Division of Vocational Rehabilitation Vermont;  
Laura Flint, Vermont Department of Mental Health*



## Sample Employer Contact Log

Date of Contact: \_\_\_\_\_

Name of Contact: \_\_\_\_\_  has hiring responsibility

For Client: \_\_\_\_\_

Purpose of the Contacts:  To secure an appointment

To learn about the employer

Talk about a candidate

Ongoing relationship

Other: \_\_\_\_\_

Information learned about the employer's business and hiring preferences (or other notes):

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Next step (include date):

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Employment specialist signature: \_\_\_\_\_

Supervisor signature \_\_\_\_\_

## Follow Along Support- Menu of Possibilities

Work day supports	Transportation	Benefit Counseling
Keeping track of work schedule/calendar Plan for clean work clothes/uniform Waking up on time- alarm clock/phone call Meals/snacks /medications during work Timecards- Punching in and out New employee orientation Grooming	Rides to and from work first few weeks on the job Auto repairs Purchasing vehicle Plan to approach co-workers for rides Bus pass/ travel training Help with Bicycle or Gas Voucher Obtaining Driver’s license	Explanation of how benefits will be affected Explore incentive programs Monthly wage reporting SSA letters Plan for savings Becoming own payee Address raises or changes in pay/hours
Co-worker and Boss Relations	Staying Sober	Managing symptoms
Strategy to disclose/not disclose Plan to get performance feedback from boss Topics of conversation with co-workers Plan to increase-decrease interactions coworkers When to accept offers for more hours Someone to listen to workplace issues	Plan to include sponsor/mentor in work issues Address potential substance use in workplace Address co-workers offer to use Plan for support on paydays Meet with A&D team to plan supports	Plan for managing stress- self care How to recognize symptoms Plan for what to do if symptoms arise at work How to call in sick if necessary Ask for medication adjustment
Next steps- Career wise	Support Network	On the Job Supports
How to ask for promotion or raise Increasing skills in workplace Managing evaluations/feedback Looking for the next job How to give notice Supported education	Involve family and friends Facilitate meetings with VR counselor Talk to treatment team about supports Involve Peer Supports Coworkers/Boss	Give employer incentive information Job coaching-demonstrate tasks Meet briefly w/ employer and client regularly Make list of job duties Ask for accommodation Use clock/alarms See page 103-104 IPS manual

## IPS and Education

Education is developmentally appropriate for adolescents and young adults. And some middle aged and older adults are also interested in school or vocational training. Educational attainment predicts employment rate among people with serious mental illnesses. And lifetime earnings are strongly associated with educational attainment in the general population.

Some people assume that supported education is not part of IPS, but that is not the case. IPS specialists have always helped some people with career development, including education and training programs. When education is related to a career goal, and a person needs a significant level of assistance getting started in school, or throughout an educational program, then an IPS specialist may be selected as the best person to provide support.

IPS specialists focus on mainstream programs for which eligibility is based on academic performance, age, or previous educational attainment. They do not promote programs that are developed for people who have disabilities. Examples of the types of institutions that have mainstream education programs include the following:

- High schools
- GED (General Educational Development) classes
- Community colleges
- Joint vocational schools
- Other schools with certificate bearing programs. Examples include dog grooming, cosmetology, culinary, and truck driving schools.
- Four-year colleges and universities

Practice principles for education, are similar to IPS practice principles for employment. A list of supported education principles is below.

1. Zero exclusion for eligibility: Any person who is interested in pursuing education or job training related to a career goal is eligible for supported education services, regardless of symptoms, substance abuse, homelessness, or other factors.
2. Focus on mainstream education and job training programs: IPS specialists help people investigate mainstream education and training programs, which are programs that are open to all community members and award degrees or certificates for successful completion of coursework. Requirements for enrolling in these education programs are related to prior educational achievement and knowledge, not disability status.

3. Supported education services use a team approach: IPS specialists have frequent contact with mental health treatment practitioners, housing specialists, school counselors, and others who have a role in helping youth achieve their education goals. They meet weekly to discuss strategies to support students. IPS specialists also meet at least monthly with state vocational rehabilitation counselors who may provide information about careers, certification and degree programs, and possible accommodations. IPS specialists also ask each student which family members or other support people they would like to involve in their education plan.
4. Supported education and employment services are integrated in the IPS vocational unit. Many young people are interested in pursuing both work and education at the same time, or switch between work and school goals. Therefore, one team provides both services to ensure continuity.
5. IPS specialists help people access information about the financial impact of their career plans: Youth are offered accurate and individualized information about how their benefits will be affected by the projected wages they will receive after earning a certificate or degree. Benefits planners also provide information about work incentives for students. And IPS specialists help students learn about options for financial aid to pay for school.
6. Rapid engagement and expeditious enrollment in educational programs: In most cases, IPS specialists facilitate participant visits to educational institutions, or assist with career exploration in the community, for example, meeting with working people to learn about careers, within 30 days after program entry.
7. IPS specialists build partnerships with school and training program staff: IPS specialists and the supervisor visit college offices for students with disabilities (the name of the office varies) to learn how students can ask for accommodations and to build relationships with the counselors. They also meet with academic advisors to learn about different education and training programs, and with financial aid counselors to learn about different ways that students receive help paying for school.
8. Education supports are continuous: IPS specialists provide support and advocacy in the application, financial planning, and enrollment process. After enrollment, IPS specialists directly provide individualized support (e.g., arranging accommodations, managing time, organizing homework, and so on). This support may involve the treatment team, peer support, and natural supports such as family and friends if desired by each student.
9. IPS supported education is individualized: IPS specialists help young people explore careers and educational programs related to their interests, academic abilities, and educational prerequisites. They ask students about their preferences for supports, for example, whether they want to request accommodations, where to meet the IPS specialist, which family members to include in the education plan, and what supports the IPS specialist should provide.

# Certification Benefits

Get Certified Today!



### For Professionals

Certifies competency in the full array of skill areas necessary to assist individuals to succeed in employment.

### For Service Providers & Funding Agencies

Provides confidence that staff have the necessary skills to perform high quality work and are committed to best practice.

### For Individuals with Disabilities

Assures job seekers that staff providing assistance are knowledgeable, highly skilled, and competent.



### CESP™ Opens the Door

- Certification opens the door to:
- Improved professional advancement & job opportunities
  - Increased income opportunities
  - Enhanced credibility with employers

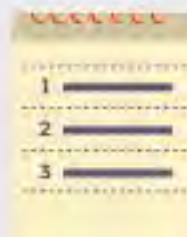
### Join a Rapidly Growing & Elite Group of Professionals

- LinkedIn Group
- CESP Meet-ups
- National networking opportunities
- Name recognition as a leader in your field
- Your name listed on the APSE website

### National and Portable



CESP™ certification is a national, portable individual credential



### Special CESP™ Benefits

- Reduced APSE membership fee
- Stay ahead of the curve
- Exclusive access to CESP™ publications, webinars & networking
- Earn a professional credential - not just a certificate of completion





# Supported Employment Training Project

a project of the Human Development Institute at the University of Kentucky

## Training

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### Events and Registration

#### Registration Shortcuts

- [Location and other info for events](#)
- [Core Training Registration Link](#)

#### Other SE Training Opportunities:

- [2022 SE Leadership Series](#)
- [HDI Online Learning System, Employment course catalog](#)
- [HDI Seminar Series, recorded](#)

#### Other Relevant Training Opportunities:

- [CWIC Training – Work Incentives Counseling Initial Training Program](#)



# Benefits Planning

## Tips on Reporting earned income to Social Security

1. Type of disability payments: 2 types (SSI or Title 16/SSDI or Title 2)
  2. Each benefit has its own rules and work incentives around how earned income affects it.
  3. In the social security office there are workers who only handle one benefit typically
  4. There are also two computer systems that house the information for a beneficiary in either of those two systems. The two computer systems do not share information.
  5. Really important to make sure you know what type of the benefit the person receives.
  6. Report any earned income MONTHLY to SSA, despite what they tell you otherwise.
- 
7. REPORTING FOR SSI:
    1. Report new employment to Social Security office once paycheck is received. Best to go into the local office to report the new employment. Provide employer, wage, hours, etc...
    2. Turn in any receipts for IRWE's or BWE's or discuss any other work incentives that may apply.
    3. Proceed to report gross earned income MONTHLY to social security. SSI beneficiaries can use the telephone wage reporting line, mobile application, face to face, or fax. Mail and drop box is not preferred which we will talk about in a moment. Mobile app must be set up at the local SSA office.
    4. If using the telephone wage line, cannot report new IRWE's or BWE's, would need to turn receipts in monthly to SSA. SSA will provide beneficiary with worksheets and phone number.
    5. Rule of thumb, REPORT by the 6<sup>th</sup> day of the following month.
    6. SSI uses a calculation to configure the SSI cash payment, so there is a 2-month delay from when someone reports the income and how it will affect the SSI cash payment-Retrospective reporting-SSA estimates the future earned income to calculate SSI payment from trends of previous months. EX: someone reports income for the month of July by Aug 6<sup>th</sup>, the reported earnings will affect the SSI check that is issued in September.
    7. If reporting by face to face-provide copies of paystubs to SSA with client name, SSN number and "SSI" clearly marked on the top. Ask for a receipt from the SSA representative that shows you were there and what you turned in. THIS IS EXTREMELY IMPORTANT TO AVOID OVERPAYMENTS!
    8. If faxing the paystubs be sure to mark the paystubs the same way as mentioned and keep a copy of the fax transmittal sheet.
    9. Mail is only recommended if sending certified, return, receipt so that beneficiary has something they can have as proof that the paystubs were received by someone!
    10. Drop boxes and regular mail are not recommended as there is no paper trail.
  8. REPORTING FOR SSDI:
    1. Earned income affects SSDI differently than SSI. This is an all or nothing type of benefit.
    2. Work reviews are conducted at random times (sometimes many years) where earned income is evaluated and SSA decides if someone should receive a check that month. This method can lead to BIG overpayments.
    3. Important to report earnings to SSA even if not evaluated monthly so that when a work review is conducted they have the information. Important for beneficiaries and payees



to track this info and if suspect they should not get the check NOT SPEND the monies or report this to SSA and return the monies to avoid an overpayment in the future.

4. Ways to report: In person, Fax, and a new feature thru the online MY SOCIAL SECURITY ACCT. Mail and drop box still not recommended. Mobile app and telephone reporting NOT an option. BE sure to mark paystubs with name, SSN #, and "SSDI or CDB".
- 
9. CONCURRENT BENEFICIARIES:
    1. Special category because the information has to go to both computer systems.
    2. To ensure proper reporting in person or via fax is preferred. Mark paystubs with name, SSN, and "SSDI and SSI". Get receipt OR HAVE A PAPER TRAIL!
    3. No mobile apps, or telephone reporting lines for this situation!
  
  10. Overpayments:
    1. For SSI, max someone pays is 10% of the FBR per month. Deducted from the SSI cash payment.
    2. Can request a payment plan or hardship to lower the payback amount.
  
  11. Payees:
    1. Many do batch reporting: large fax with all beneficiary paystub info. Need to send a fax or identify for each beneficiary what type of benefit they receive to avoid overpayment/underpayments!
    2. If payee fails to do their reporting responsibility and this result in an overpayment, person can file a waiver of reconsideration and stating not person's fault for overpayment and sometimes payee can be responsible for repayment!

12. OTHER:

There are now email and text reminders that beneficiaries can sign up for to remind them to report monthly to Social Security. Can be set up thru the MYSOCIAL SECURITY account on [www.ssa.gov](http://www.ssa.gov)

Remind beneficiaries to report increases or decreases in hours or pay rate.

Also remind beneficiaries to report when a job ends to Social Security. (if not done can lead to underpayments)



# FIND HOW WORKING CAN IMPACT YOUR BENEFITS

## CONTACT YOUR KENTUCKY WIPA PROGRAMS

### WHAT IS A WIPA PROGRAM?

Work Incentives Planning and Assistance (WIPA) programs help people with disabilities understand how working can impact their Social Security Disability Insurance (SSDI) or Supplemental Security Income (SSI) benefits.

### WHO IS ELIGIBLE?

People from 14 years old to full retirement age who have a disability and currently receive SSI and/or Title II (or another Title II case benefit) and who are working, or interested in going to work, or increasing their work hours.

### WHO PROVIDES THE HELP?

Community Work Incentives Coordinators (CWICs) are trained to help people with disabilities who receive Social Security benefits learn how work can impact their benefits and find resources to help reach their employment goals.

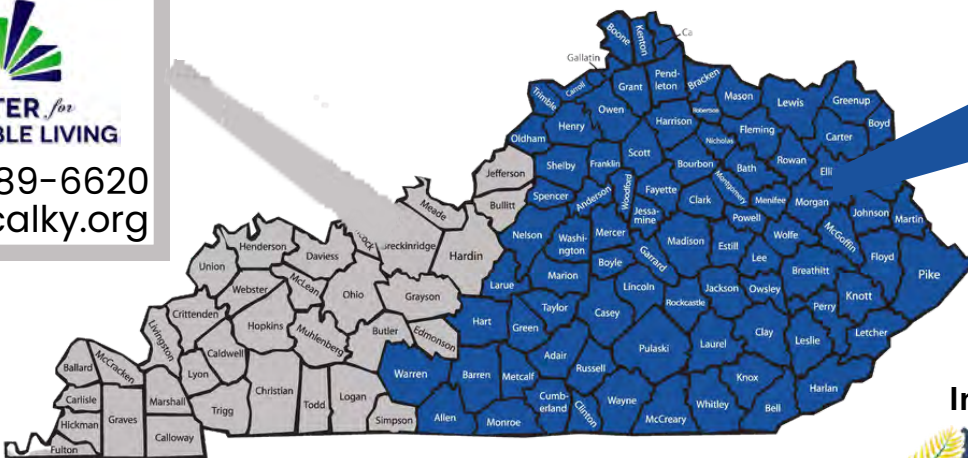
### WHAT KIND OF HELP?

- Personal counseling on how work can impact benefits.
  - Information on federal or state Work Incentives Programs.
  - Working together with federal, state, private agencies, and non-profit organizations that serve SSI and SSDI recipients.
  - Contacting a WIPA is a first step for those who choose to work.
- \*NOTE: WIPAs cannot help you apply for benefits.**



**CENTER for ACCESSIBLE LIVING**

(844) 689-6620  
wipa@calky.org



(866) 336-3316  
workincentives  
@goodwillky.org

Information Provided by:



Kentucky Financial Empowerment Commission



Southeast ADA Center



# Fact Sheet

## SOCIAL SECURITY

### 2025 SOCIAL SECURITY CHANGES

#### Cost-of-Living Adjustment (COLA):

Based on the increase in the Consumer Price Index (CPI-W) from the third quarter of 2023 through the third quarter of 2024, Social Security and Supplemental Security Income (SSI) beneficiaries will receive a 2.5 percent COLA for 2025. Other important 2025 Social Security information is as follows:

<b>Tax Rate</b>	<b>2024</b>	<b>2025</b>
Employee	7.65%	7.65%
Self-Employed	15.30%	15.30%

**NOTE:** The 7.65% tax rate is the combined rate for Social Security and Medicare. The Social Security portion (OASDI) is 6.20% on earnings up to the applicable taxable maximum amount (see below). The Medicare portion (HI) is 1.45% on all earnings. Also, as of January 2013, individuals with earned income of more than \$200,000 (\$250,000 for married couples filing jointly) pay an additional 0.9 percent in Medicare taxes. The tax rates shown above do not include the 0.9 percent.

	<b>2024</b>	<b>2025</b>
<b>Maximum Taxable Earnings</b>		
Social Security (OASDI only)	\$168,600	\$176,100
Medicare (HI only)	No Limit	
<b>Quarter of Coverage</b>		
	\$1,730	\$1,810
<b>Retirement Earnings Test Exempt Amounts</b>		
Under full retirement age	\$22,320/yr. (\$1,860/mo.)	\$23,400/yr. (\$1,950/mo.)
NOTE: One dollar in benefits will be withheld for every \$2 in earnings above the limit.		

	2024	2025
The year an individual reaches full retirement age	\$59,520/yr. (\$4,960/mo.)	\$62,160/yr. (\$5,180/mo.)
NOTE: Applies only to earnings for months prior to attaining full retirement age. One dollar in benefits will be withheld for every \$3 in earnings above the limit.		
Beginning the month an individual attains full retirement age	None	

	2024	2025
<b>Social Security Disability Thresholds</b>		
Substantial Gainful Activity (SGA)		
Non-Blind	\$1,550/mo.	\$1,620/mo.
Blind	\$2,590/mo.	\$2,700/mo.
Trial Work Period (TWP)	\$1,110/mo.	\$1,160/mo.
<b>Maximum Social Security Benefit: Worker Retiring at Full Retirement Age</b>		
	\$3,822/mo.	\$4,018/mo.
<b>SSI Federal Payment Standard</b>		
Individual	\$ 943/mo.	\$ 967/mo.
Couple	\$1,415/mo.	\$1,450/mo.
<b>SSI Resource Limits</b>		
Individual	\$2,000	\$2,000
Couple	\$3,000	\$3,000
<b>SSI Student Exclusion</b>		
Monthly limit	\$2,290	\$2,350
Annual limit	\$9,230	\$9,460
<b>Estimated Average Monthly Social Security Benefits Payable in January 2025</b>		
	Before 2.5% COLA	After 2.5% COLA
All Retired Workers	\$1,927	\$1,976
Aged Couple, Both Receiving Benefits	\$3,014	\$3,089
Widowed Mother and Two Children	\$3,669	\$3,761
Aged Widow(er) Alone	\$1,788	\$1,832
Disabled Worker, Spouse and One or More Children	\$2,757	\$2,826
All Disabled Workers	\$1,542	\$1,580

This press release was produced and disseminated at U.S. taxpayer expense.

# Self-Employment and SSDI

## 2024 Fact Sheet on Work Incentives



### What it is:

- For Social Security Disability Insurance (SSDI) beneficiaries who engage in self-employment, the Social Security Administration (SSA) offers some work incentives that can be useful in starting and maintaining a business.
- This fact sheet briefly overviews Self-Employment and Work Incentives for SSDI. You should contact your local SSA office and trained Benefits Counselor to help you understand the specifics of self-employment and work incentives and how they apply to you.

### How it helps:

When calculating your earnings from self-employment, the SSA counts Net Earnings from Self Employment (NESE). This is your gross receipts minus your business expenses multiplied by .9235 (92.35%). This way, a portion of your net earnings are counted in determining your income from self-employment. SSDI beneficiaries need to be aware of several important work incentives. These include:

- **Trial Work Period (TWP):** For self-employment, TWP months count when NESE is over \$1,110 (in 2024) or when you work for 80 hours or more in the self-employment venture. It is important to report your earnings and your monthly work hours to SSA when you are self-employed.
- **Extended Period of Eligibility (EPE):** SSA will average your NESE over a period of work activity, determining whether you are earning Substantial Gainful Activity (SGA). This amount is \$1,550 (in 2024). SSA will consider your activities in your business and the value of these activities to your business. They also consider market conditions, investments, and services of others who help you and your profit distribution in determining SGA.
- **Impairment-Related Work Expenses (IRWE):** If you have reasonable expenses for items and services that are related to your disability, that are necessary for you to work, that you pay out of pocket in the months you are working and are not reimbursed by another source, an IRWE may help you during self-employment in keeping your NESE below the SGA level. This work incentive may apply to you in some limited circumstances if you cannot claim these items as a business expense.
- **Unincurred Business Expenses:** If business support is given to you at no cost, for example, Vocational Rehabilitation pays for services or equipment you need in self-employment, this support is deducted from your net earnings when determining if you have reached SGA.
- **Unpaid Help:** If you receive help from friends, relatives, professionals, or others in performing business-related tasks, and they are not paid for this assistance, the fair labor cost of this assistance is deducted from your net earnings in determining whether you have engaged in SGA.

### How to find more information and help:

#### Disability Benefits 101

[Ky.db101.org](http://Ky.db101.org)

#### Ticket to Work Helpline

1-866-968-7842

#### Work Incentives Planning & Assistance (WIPA)

#### Center for Accessible Living

844-689-6620 (voice)

888-813-8652 (TTY)

[wipa@calky.org](mailto:wipa@calky.org)

#### Work Incentives Planning & Assistance (WIPA)

#### Goodwill Industries of KY

866-336-3316 (voice)

866-833-2976 (TTY)

[workincentives@goodwillky.org](mailto:workincentives@goodwillky.org)

This fact sheet has been prepared under the guidance of a certified Community Partner Work Incentives Counselor through training authorized by the Social Security Administration. This is not a Social Security Administration document.

# How Your SSI Payment Changes with Your Earnings

2024 Fact Sheet on Work Incentives



## What it is:

- Supplemental Security Income (SSI) recipients can continue to be eligible to receive SSI payments when working if they still have a disability and meet other requirements, such as income and resource limits.
- When working, SSI cash will gradually decrease as earnings increase by approximately \$1 for every \$2 earned.

## How it helps:

If you are working, continue to have a disability, have resources under \$2,000, and are receiving SSI, the Social Security Administration (SSA) will allow you to continue to be eligible for SSI and will gradually reduce your SSI cash payment with earnings.

The amount of your adjusted SSI payment will depend on your total countable income (earned and unearned). Whenever your earnings increase or decrease, your SSI payment will be adjusted.

## How it works:

SSA will gradually reduce your SSI payment as your earnings from work increase. This is done by applying some exclusions to your income and earnings.

SSA will first deduct a \$20 General Income Exclusion from your earnings and then deduct a \$65 Earned Income Exclusion from your earnings. After applying these exclusions, SSA will count half of the remainder of your earnings in calculating your new SSI payment.

In addition, other work incentives may be applied to your situation and deducted from your earnings in calculating your new SSI payment. Eventually, with increased earnings, your total countable income may reach the Break Even Point. This amount is reached when your total countable income reduces your SSI payment to zero.

When SSI recipients with disabilities work, they usually have more money available because of the countable income formula.

A trained Community Work Incentives Coordinator can help you understand how total countable income is applied and explore additional work incentives that may apply.

## How to find more information and help:

### Disability Benefits 101

[Ky.db101.org](http://Ky.db101.org)

### Ticket to Work Helpline

1-866-968-7842

### Work Incentives Planning & Assistance (WIPA)

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# Trial Work Period (TWP)

## 2024 Fact Sheet on Work Incentives



### What it is:

- For Social Security Disability Insurance (SSDI) beneficiaries, work incentives are available to plan for future benefit needs.
- These work incentives occur sequentially along a timeline, allowing people to test their earning capacity.
- The Trial Work Period (TWP) will help SSDI beneficiaries in their efforts toward employment by allowing them to test their ability to work to their fullest potential while still receiving their SSDI cash benefit.

### How it helps:

The Trial Work Period (TWP) allows you nine months during which you can initially test your ability to work to your fullest potential without restrictions on how much you can earn. During these nine months, you can work and receive your full SSDI benefit payment no matter how much you earn.

### How it works:

The TWP months (also called service months) are nine months, not necessarily in a row, during a 60-month (5-year) rolling period. In 2024, each month you earn gross wages of \$1,110, you have used a TWP month. The amount of earnings for TPW changes each year. Prior to 2024, the amount was less.

It is important to consult with a Community Work Incentives Coordinator and the Social Security Administration (SSA) to understand if you are using TWP months or may have used them in the past few years. After the nine months of TWP are used, the SSA will also contact you to review your work activity. This is called a Continuing Disability Review. When you have used all the TWP months, an Extended Period of Eligibility (EPE) begins, and other work incentives are available during the EPE.

A Community Work Incentives Coordinator can help you understand the TWP, how to track your TWP months, and other work incentives that apply to you.

### How to find more information and help:

#### Disability Benefits 101

[Ky.db101.org](http://Ky.db101.org)

#### Ticket to Work Helpline

1-866-968-7842

#### Work Incentives Planning & Assistance (WIPA)

#### Center for Accessible Living

844-689-6620 (voice)

888-813-8652 (TTY)

[wipa@calky.org](mailto:wipa@calky.org)

#### Work Incentives Planning & Assistance (WIPA)

#### Goodwill Industries of KY

866-336-3316 (voice)

866-833-2976 (TTY)

[workincentives@goodwillky.org](mailto:workincentives@goodwillky.org)

# Approved Work Incentive Coordinators for Kentucky Office of Vocational Rehabilitation

**WIPA'S - Community Work Incentive Coordinators - No Authorization needed**

**For referrals: Use #encrypt when sending any referral by email**

## Center for Accessible Living

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501 S. 2nd Street, Ste. 200

Louisville, KY 40202

### Counties served:

Ballard	Breckinridge	Bullitt	Butler	Caldwell
Calloway	Carlisle	Christian	Crittenden	Daviess
Edmonson	Fulton	Graves	Grayson	Hancock
Hardin	Henderson	Hickman	Hopkins	Jefferson
Livingston	Logan	Lyon	Marshall	McCracken
McLean	Meade	Muhlenberg	Ohio	Simpson
Todd	Trigg	Union	Webster	

### For initial referrals

Email using #encrypt to [WIPA@calky.org](mailto:WIPA@calky.org) or call David Edwards at 859-638-2155;  
[dedwards@calky.org](mailto:dedwards@calky.org); 859-687-9474 (fax).

### For follow-up questions

Donna Mundy (WIPA Program Manager); [dmundy@calky.org](mailto:dmundy@calky.org); 812-389-1050; 502-438-6319  
(cell); 812-389-1332 (fax)

## Goodwill Industries of Kentucky

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130 W. New Circle Rd., Ste. 100

Lexington, KY 40505

### Counties served

Adair	Allen	Anderson	Barren	Bath
Bell	Boone	Bourbon	Boyd	Boyle
Bracken	Breathitt	Campbell	Carroll	Carter
Casey	Clark	Clay	Clinton	Cumberland
Elliott	Estill	Fayette	Fleming	Floyd
Franklin	Gallatin	Garrard	Grant	Green
Greenup	Harlan	Harrison	Hart	Henry
Jackson	Jessamine	Johnson	Kenton	Knott
Knox	Larue	Laurel	Lawrence	Lee
Leslie	Letcher	Lewis	Lincoln	Madison
Magoffin	Mason	Marion	Martin	McCreary
Menifee	Mercer	Metcalfe	Monroe	Montgomery
Morgan	Nelson	Nicholas	Oldham	Owen
Owsley	Pendleton	Perry	Pike	Powell
Pulaski	Robertson	Rockcastle	Rowan	Russell
Scott	Shelby	Spencer	Taylor	Trimble
Warren	Washington	Wayne	Whitley	Wolfe
Woodford				



### **For initial referrals**

866-336-3316; 502-371-8949(fax); [workincentives@goodwillky.org](mailto:workincentives@goodwillky.org)

### **For follow-up questions**

Emily James (WIPA Program Manager) 859-277-3661; [emily.james@goodwillky.org](mailto:emily.james@goodwillky.org); or

Cecilia Machado; 859-806-5112; [cecilia.machado@goodwillky.org](mailto:cecilia.machado@goodwillky.org)

### **OVR (In-house) KWIC Services**

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\*\*No authorization needed

\*\* FOR REFERRALS: Please send encrypted email to [ovrkwic@ky.gov](mailto:ovrkwic@ky.gov) with case number and a request for needed services. Application and recent BPQY must already be uploaded to CMS.

<b>KWIC</b>	<b>Service area</b>	<b>Phone</b>	<b>Email</b>
<b>Ashleigh Hesler</b>	<b>(West Region)</b> Paducah, Owensboro, and West Blind districts; <b>(South Region)</b> Bowling Green and Somerset districts; <b>(West Central Region)</b> Louisville, Elizabethtown, East Jefferson, and Central Blind districts	(502)963-2206	Referrals: <a href="mailto:ovrkwic@ky.gov">ovrkwic@ky.gov</a> ; <a href="mailto:Ashleigh.Hesler@ky.gov">Ashleigh.Hesler@ky.gov</a>
<b>Evangeline Johnson</b>	<b>(East Central and East regions)</b> Danville, Florence, Lexington, Prestonsburg, Ashland, Hazard, Bluegrass, Covington, and East Blind districts	(859)246-2537	Referrals: <a href="mailto:ovrkwic@ky.gov">ovrkwic@ky.gov</a> ; <a href="mailto:Evangeline.Johnson@ky.gov">Evangeline.Johnson@ky.gov</a>
<b>Sarah Richardson</b>	Consumers who will meet at Georgetown and Frankfort OVR offices	(502)782-3423	Referrals: <a href="mailto:ovrkwic@ky.gov">ovrkwic@ky.gov</a> ; <a href="mailto:SarahF.Richardson@ky.gov">SarahF.Richardson@ky.gov</a>

## Community Partner Work Incentive Coordinators (CPWIC)

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**\*\*\*Please see Benefits Analysis Service Fee Memo for authorization instructions**

Vendor	Agency/Address	Phone	Email
<b>Carol Dupin</b>	<b>Communicare</b> Supported Employment 1311 N. Dixie, Bldg. B Elizabethtown KY, 42701	270-769-5301, ext. 1325	<a href="mailto:JCDupin@communicare.org">JCDupin@communicare.org</a>
<b>Mindy Grimberg</b>	<b>Path Forward of Kentucky</b> 11807 Brinley Avenue Louisville, KY 40243	502-451-2565	<a href="mailto:mindy.grimberg@pathforwardky.com">mindy.grimberg@pathforwardky.com</a>
<b>Larry Hensley</b>	170 Hwy 337 N Corydon, IN 47112	(812) 572-1760	<a href="mailto:Larryhensley1947@yahoo.com">Larryhensley1947@yahoo.com</a>
<b>Sherri Lutz</b>	<b>Communicare</b> 320 Ring Road Elizabethtown, KY 42701	270-735-1803, ext. 2113 270-668-5580 (cell)	<a href="mailto:SALutz@communicare.org">SALutz@communicare.org</a>
<b>Holly O'Mary (RCD referrals)</b>			<a href="mailto:Hollyomary23@gmail.com">Hollyomary23@gmail.com</a>
<b>Terri Ross</b>		513-340-6181	<a href="mailto:Rossterri59@yahoo.com">Rossterri59@yahoo.com</a>
<b>Tim Sloan</b>	<b>Benefits Counseling Services</b> P.O. Box 6332, Elizabethtown, KY 42702.	270-234-6404	<a href="mailto:timsloanbcs@yahoo.com">timsloanbcs@yahoo.com</a>
<b>Hamri Tsegaye</b>	4010 Dupont Circle, #518 Louisville, KY 40207	502-893-2006	<a href="mailto:hamrawitt@gmail.com">hamrawitt@gmail.com</a>
<b>Carolyn Wheeler</b>	1041 Heather Hill Lane Lexington, KY 40511	859-492-7971	<a href="mailto:carolynwheeler1210@gmail.com">carolynwheeler1210@gmail.com</a>

## Benefits Worksheet

<b><u>Benefit</u></b>		<b><u>Amount</u></b>
SSI	<input type="checkbox"/>	Click here to enter text.
SSDI	<input type="checkbox"/>	Click here to enter text.
TANF	<input type="checkbox"/>	Click here to enter text.
SNAP (Food Stamps)	<input type="checkbox"/>	Click here to enter text.
Unemployment	<input type="checkbox"/>	Click here to enter text.
Spouse or dependent child receives benefits	<input type="checkbox"/>	Click here to enter text.
Medicaid	<input type="checkbox"/>	Click here to enter text.
Medicare	<input type="checkbox"/>	Click here to enter text.
Housing Subsidy	<input type="checkbox"/>	Click here to enter text.
Other:	<input type="checkbox"/>	Click here to enter text.

### **What was discussed?**



# WIPA NTDC



[Introduction](#)

[Upcoming Trainings](#)

[Archived Trainings](#)

## UPCOMING TRAININGS

### Supplemental Trainings

#### Registration Process for Live Supplemental Trainings

In order to register for a supplemental training session, you must:

1. [Create a myNTC account](#) (if you do not already have one).
2. Log into your [myNTC account](#).
3. Click on Training Registrations.
4. Click on the Supplemental Trainings tab and follow the instructions provided.

You may also register through your myNTC account by clicking on the training registration link in the calendar below for the dates you would like to attend, and then follow the instructions to complete your registration request.

**Please note:** Submitting your online registration for a supplemental training session does not confirm your participation. Once registration closes for a supplemental training, we will prioritize the registration requests and email notifications of participation to all individuals who are registered.

If you are confirmed to participate, we will email you with training logistics and materials required to participate in the training session.

If you have any questions or support needs regarding registration for supplemental training sessions, please contact Julie Schall at [jaschall@vcu.edu](mailto:jaschall@vcu.edu) or 804-827-0741.

Title

[Information Gathering, Verification, and Analysis of Healthcare C](#)

Format of Training: Webinar

[Providing Effective Work Incentives Supports on Other Federal I](#)

# Have a smartphone?

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You can now use it to report wages for the SSI program!



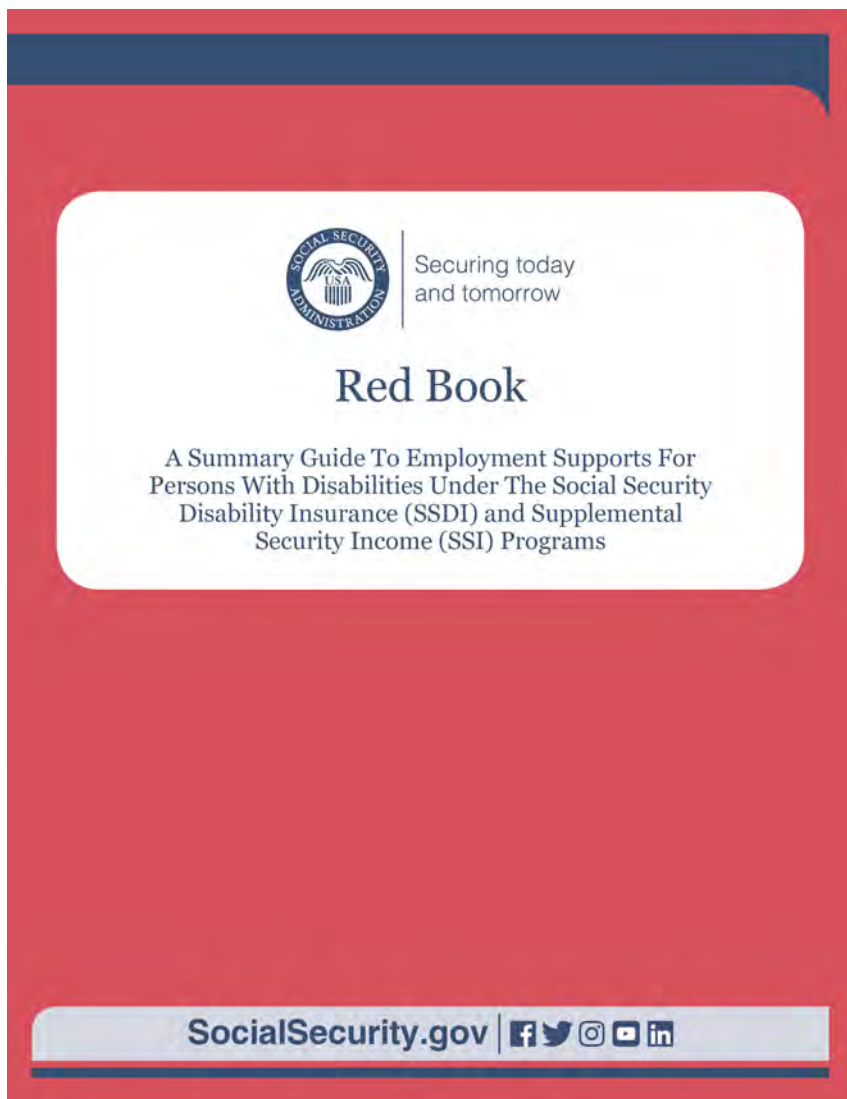
## You will need:

- The Social Security number of the person who is reporting the wages (the caller)
- The Social Security number of the person who earns the wages (the worker)
- The total amount of **gross** wages received by the worker (gross wages are the amount of wages before taxes and other deductions are taken out)
- The caller's name as it appears on their Social Security card

If you want to report your wages with the **new** smartphone application or by using your phone, contact your local Social Security office for additional instructions.

Scan the QR code below to download the **free** SSI mobile wage reporting app from the Apple iTunes store or the Android Google Play Store.





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