OVR SE 2

(rev. 08/2024)

Kentucky Office of Vocational Rehabilitation
Job Development Activity Note

Kentucky Career Center
Vocational Rehabilitation

BASIC INFORMATION

Individual Name	Counselor Name
Mark Wilson	Heath Towland
Provider Name	**Employment Specialist Name**
ABC Agency	Melinda Thomas
Vocational Goal	**Total Billable Hours for this activity**
Caregiver	3

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

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ACTIVITY

Date of Activity	Exact time activity took place
01/03/2025	9:30a - 12:00p

Activity Description

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Does this activity end with the Individual securing employment? (Choose one; Yes/No)

No

Is the Individual still satisfied with their vocational goal? (Choose one; Yes/No)
Yes
Does the vocational goal need to be amended? (Choose one; Yes/No)
No
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?
Actively apply for jobs listed on the job search plan. Horizon Healthcare is hiring and I will plan to visit them and learn more about the company for Mark.
When and where will the next activity take place?
01/07/25

Submit to the OVR Counselor by the 5th of each month.

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OVR SE 4
(rev. 08/2024)

Kentucky Office of Vocational Rehabilitation
Supported Employment Services Note

Kentucky Career Center
Vocational Rehabilitation

BASIC INFORMATION

Individual Name	Individual Date of Birth
Mark Wilson	03/15/1989
Counselor Name	**Provider Name**
Heath Towland	ABC Agency
Employment Specialist Name	**Total billable hours**
Melinda Thomas	2
Date	
02/05/2025	

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)
Onsite
What support services did you provide?
I met with Mark at Atria Senior Living arriving at 7:30 am. Mark shared he had practiced walking to Atria as well as taking the morning bus route and opted for the bus route as it put him at the closest bus stop at 7:00 am, allowing him ample time to arrive to Atria by 8:00 am on the days he worked. He stated that the afternoon bus routes are often longer so he will walk home as the weather permits. I went with Mark to ensure he completed the required forms properly and assist it he had any questions. Mark was given the Staff Handbook and Policies to review as well as his badge and uniforms. We then met with Mrs. Jones, who gave Mark, along with another new hire, a tour of the work areas and showed each how to use the time clock. Mark was happy to see that his badge was used to clock in and out with and he would not have to keep up with an app or learn a computer system for it. He was also instructed that his badge must be used to enter certain areas, go in and out of the building and rooms of the facility as a safety precaution. Mark was also introduced to the staff members he will be working directly, he will begin by job shadowing his co-worker, Ricky, who has been with the facility for two years. Mark is one of just five male CNAs and will be working with the male residents.

RESULTS

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

Mrs. Jones shared that that they are happy to have Mark as an employee and feels that that he will be a valued team member, stating that he and Ricky had already seemed to hit it off. Mrs. Jones stated that she would be checking in with Mark throughout his shift and would be happy to help if he has any questions. I encouraged Mrs. Jones to share that with Mark to ensure he feels comfortable in speaking with her and his co-workers.

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

Mark was very positive and prepared for his first day, even took notes when Mrs. Jones was reviewing how to use the badges and clocking in and out. Mark was respectful to everyone he met and was eager to begin job shadowing and meet the residents of the facility.

How is the individual achieving stability on the job?

Mark will begin by job shadowing his co-workers for at least two weeks; however training is often self-paced, they do not "rush" employees into the their role and want them to feel prepared and confident in working independently. He has received a task list outlining daily, weekly and monthly duties as well as specific items that pertain to each resident he will be providing care for.

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

Mark will continue to job shadow his co-workers for at least two weeks before working independently. Mark is eager and willing to obtain as much training needed for his role and wants to be sure he is given feedback from his co-workers and supervisors.

How are you reducing your presence on the job site?

I am reducing my presence on the job site by supporting Mark's training and task performance with his co-workers and supervisors. I will reduce my presence further by encouraging Mark to continue working directly with coworkers and managers in training. Mark has requested that I check in with him twice per week during his first month. I plan to meet him at Atria on Mondays at 10:00 am and Fridays at 1:00 pm. These times work well with his scheduled breaks and lunch so I do not interfere with his direct training and work. I will also be meeting with Mrs. Jones as well to obtain feedback on how Mark is progressing in his position.

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

Mark is communicating with his co-workers and supervisors, Mark is friendly and respectable and does not have any communication issues. He knows he can ask questions when needed and his co-workers and supervisors are experienced and helpful.

What additional information or insight was obtained?

Mark will start by job shadowing under working under the supervision of his coworkers, and they generally provide this for at least two weeks while he is learning his schedule and assigned tasks.

NEXT STEPS

When will you provide the next service?

Friday, 02/07/2025 at 10:00 am

Do you feel the individual has reached stability on the job? (Choose one; Yes/No)

No

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, type of disability, genetic information, marital status, sexual orientation, gender identity, citizenship, pregnancy, veteran status, or any other status protected by applicable law.

OVR SE 4
(rev. 08/2024)

Kentucky Office of Vocational Rehabilitation
Supported Employment Services Note

Kentucky Career Center
Vocational Rehabilitation

BASIC INFORMATION

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Counselor Name	**Provider Name**
Heath Towland	ABC Agency
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Melinda Thomas	2
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Kentucky Office of Vocational Rehabilitation
Supported Employment Services Note

Kentucky Career Center
Vocational Rehabilitation

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Date	
02/05/2025	

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SERVICE

Were services provided on this date performed onsite, offsite, or both? (Please choose)
Onsite
What support services did you provide?
I met with Mark at Atria Senior Living arriving at 7:30 am. Mark shared he had practiced walking to Atria as well as taking the morning bus route and opted for the bus route as it put him at the closest bus stop at 7:00 am, allowing him ample time to arrive to Atria by 8:00 am on the days he worked. He stated that the afternoon bus routes are often longer so he will walk home as the weather permits. I went with Mark to ensure he completed the required forms properly and assist it he had any questions. Mark was given the Staff Handbook and Policies to review as well as his badge and uniforms. We then met with Mrs. Jones, who gave Mark, along with another new hire, a tour of the work areas and showed each how to use the time clock. Mark was happy to see that his badge was used to clock in and out with and he would not have to keep up with an app or learn a computer system for it. He was also instructed that his badge must be used to enter certain areas, go in and out of the building and rooms of the facility as a safety precaution. Mark was also introduced to the staff members he will be working directly, he will begin by job shadowing his co-worker, Ricky, who has been with the facility for two years. Mark is one of just five male CNAs and will be working with the male residents.

RESULTS

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

Mrs. Jones shared that that they are happy to have Mark as an employee and feels that that he will be a valued team member, stating that he and Ricky had already seemed to hit it off. Mrs. Jones stated that she would be checking in with Mark throughout his shift and would be happy to help if he has any questions. I encouraged Mrs. Jones to share that with Mark to ensure he feels comfortable in speaking with her and his co-workers.

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

Mark was very positive and prepared for his first day, even took notes when Mrs. Jones was reviewing how to use the badges and clocking in and out. Mark was respectful to everyone he met and was eager to begin job shadowing and meet the residents of the facility.

How is the individual achieving stability on the job?

Mark will begin by job shadowing his co-workers for at least two weeks; however training is often self-paced, they do not "rush" employees into the their role and want them to feel prepared and confident in working independently. He has received a task list outlining daily, weekly and monthly duties as well as specific items that pertain to each resident he will be providing care for.

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

Mark will continue to job shadow his co-workers for at least two weeks before working independently. Mark is eager and willing to obtain as much training needed for his role and wants to be sure he is given feedback from his co-workers and supervisors.

How are you reducing your presence on the job site?

I am reducing my presence on the job site by supporting Mark's training and task performance with his co-workers and supervisors. I will reduce my presence further by encouraging Mark to continue working directly with coworkers and managers in training. Mark has requested that I check in with him twice per week during his first month. I plan to meet him at Atria on Mondays at 10:00 am and Fridays at 1:00 pm. These times work well with his scheduled breaks and lunch so I do not interfere with his direct training and work. I will also be meeting with Mrs. Jones as well to obtain feedback on how Mark is progressing in his position.

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

Mark is communicating with his co-workers and supervisors, Mark is friendly and respectable and does not have any communication issues. He knows he can ask questions when needed and his co-workers and supervisors are experienced and helpful.

What additional information or insight was obtained?

Mark will start by job shadowing under working under the supervision of his coworkers, and they generally provide this for at least two weeks while he is learning his schedule and assigned tasks.

NEXT STEPS

When will you provide the next service?

Friday, 02/07/2025 at 10:00 am

Do you feel the individual has reached stability on the job? (Choose one; Yes/No)

No

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:

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OVR SE 4 Kentucky Office of Vocational Rehabilitation

(rev. 10/2024) **Supported Employment Services Note**

Kentucky Career Center
Vocational Rehabilitation

BASIC INFORMATION

Individual Name	Individual Date of Birth
Mark Wilson	03/15/1989
Counselor Name	**Provider Name**
Heath Towland	ABC Agency
Employment Specialist Name	**Total billable hours**
Melinda Thomas	1
Date	
03/04/2025	

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SERVICE

Were services provided on this date performed onsite, offsite, or both? (Please choose)
Off-site
What support services did you provide?
I met with Mark at the Library at 10:00 am. Mark shared that Monday had gone well, with him working independently, receiving only observation and minimal assistance. He shared that he was still nervous at mealtimes, and when setting up the residents' plates, he had to refer to his flash cards several times. He shared that he had been thinking about why he gets overwhelmed at lunch, and he believes it is because all the residents come into the room at once, leaving him feeling rushed to serve their food. I reminded Mark to discuss some coping strategies to reduce his anxiety during mealtimes and to work through his feelings when faced with one of his residents going to the hospital with his therapist at their next appointment. Mark said he would, and his next therapy appointment is on March 20th.

RESULTS

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

I did not speak with Mark's employer today.

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

Mark said he liked his job, and he began working his entire shift independently, but he is still struggling with the dietary needs and restrictions of his residents. Mark stated that he met a new hire today and was able to answer some of his questions.

How is the individual achieving stability on the job?

Mark began working his entire shift independently today, and it has gone well. Mark stated that he still gets nervous at mealtimes because he is afraid he will mess up. Both his supervisor and lead are there to observe and help if needed.

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

Mark will continue to learn tasks and ask questions of his supervisor and co-workers when needed. He will discuss some coping strategies with his therapist at their next appointment to help reduce anxiety during mealtimes and to help him work through his feelings when faced with one of his residents going to the hospital.

How are you reducing your presence on the job site?

Mark and I are still meeting two days per week. But, beginning this week, we are meeting one day at the job site and one day at the library. This allows Mark more time to work alongside and learn from his co-workers.

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

Reducing my time at the job site will further encourage Mark to ask questions and speak with his co-workers and supervisor about any issues or concerns he may have.

What additional information or insight was obtained?

Mark shared that he loves his job and really enjoys having money to purchase personal items he needs. Mark said he hopes to hear about his SNAP benefits and his apartment soon.

NEXT STEPS

When will you provide the next service?

Friday, 03/07/25 at 10:00 at the worksite.

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

No

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.

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OVR SE 4 Kentucky Office of Vocational Rehabilitation

(rev. 10/2024) **Supported Employment Services Note**

Kentucky Career Center
Vocational Rehabilitation

BASIC INFORMATION

Individual Name	Individual Date of Birth
Mark Wilson	03/15/1989
Counselor Name	**Provider Name**
Heath Towland	ABC Agency
Employment Specialist Name	**Total billable hours**
Melinda Thomas	1
Date	
03/07/2025	

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SERVICE

Were services provided on this date performed onsite, offsite, or both? (Please choose)
Onsite
What support services did you provide?
I met with Mark at Atria Senior Living today during his morning break. He was upbeat and shared that the resident who recently went to the hospital is still doing well. He shared that he is continuing to work independently with observation by Ricky and Mrs. Jones. Reviewing his flash cards the night before work and prior to mealtime to learn about his residents' dietary needs and restrictions has reduced his anxiety, but he is still afraid of messing up.

RESULTS

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

I spoke with Ricky today, as Mrs. Jones was in a meeting, and he shared positive feedback. Ricky shared that Mark continues to work well as a team member and seems to like his work. He is organized and more confident since working his shift independently. He did mention that Mark continues to use his flash cards and is doing better with the dietary needs and restrictions of his residents, but he still has some anxiety due to the fear of messing up. Ricky stated that Mark is no longer hesitant in assisting his residents with their hygiene needs. He said it usually takes most staff a month or so to get comfortable with doing this task.

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

Ricky began working his entire shift independently this week, with Ricky and Mrs. Jones providing observation. Ricky stated that Mark seems more confident since working independently and is an asset to the team. He continues to greet his coworkers by name.

How is the individual achieving stability on the job?

Since working his entire shift independently this week, Mark is exhibiting more confidence. Mark noted that his confidence has increased by answering questions from the new hire.

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

Mark will continue to utilize his training and job shadowing for the lunch tasks. Mark will continue to improve the lunch tasks as he works independently and in collaboration with his coworkers. He will continue studying the flash cards to learn his residents' dietary needs and restrictions.

How are you reducing your presence on the job site?

I will continue to work with Mark to increase his natural support on the job by meeting with him only one day per week onsite, allowing him time to work alone with his coworkers.

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

Reducing my time at the job site will further encourage Mark to ask questions and speak with his co-workers and supervisor about any issues or concerns he may have.

What additional information or insight was obtained?

Mark mentioned that he feels more confident since he has been working his shift independently. Ricky and Mrs. Jones frequently commend him on the great job he is doing and appreciate his willingness to be a team player by helping wherever needed.

NEXT STEPS

When will you provide the next service?

Tuesday, 3/11/25 at 10:00 am at the Library

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

No

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.

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OVR SE 4 Kentucky Office of Vocational Rehabilitation

(rev. 10/2024) **Supported Employment Services Note**

Kentucky Career Center
Vocational Rehabilitation

BASIC INFORMATION

Individual Name	Individual Date of Birth
Mark Wilson	03/15/1989
Counselor Name	**Provider Name**
Heath Towland	ABC Agency
Employment Specialist Name	**Total billable hours**
Melinda Thomas	1
Date	
03/11/2025	

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SERVICE

Were services provided on this date performed onsite, offsite, or both? (Please choose)
Off-site
What support services did you provide?
I met with Mark at the Library at 10:00 am. Mark said he still loved his job, but he is worried he will mess up at mealtimes, which causes him anxiety, even though he has been studying his flash cards to become more familiar with his residents' dietary needs and restrictions. Mark said he could not wait until he met with his therapist on March 20th to discuss with him some coping strategies to help reduce his anxiety during mealtime and work through his feelings when one of his residents goes to the hospital. We discussed Mark bringing his flash cards to our next meeting at the Library so we could brainstorm ways to help Mark memorize the dietary needs and restrictions of his residents.

RESULTS

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

I did not speak with Mark's employer today.

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

Mark said he enjoys his job and working independently, but still has anxiety due to fear of messing up during mealtimes, even though he has memorized some of his residents' dietary needs and restrictions. Mark said his favorite part of his job was interacting with the residents.

How is the individual achieving stability on the job?

Mark enjoys his job and has gained more confidence in himself since working independently. He knows that both his supervisor and lead are there to observe and help if needed.

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

Mark will continue to use his flash cards and ask questions of his supervisor and co-workers when needed. Mark will bring his flash cards to our next appointment at the library, and we will brainstorm ways to help him memorize each resident's dietary needs and restrictions.

How are you reducing your presence on the job site?

I have worked to increase natural support on the job by meeting with Mark only one day per week onsite, thus allowing him time to work alone with his coworkers.

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

Reducing my time at the job site will further encourage Mark to ask questions and speak with his co-workers and supervisor about any issues or concerns he may have.

What additional information or insight was obtained?

Mark shared that the resident who had gone to the hospital continues to do well. He still thinks about this day and how it brought up memories of his grandparents. He said Mrs. Jones was very understanding and allowed him to take a longer break that day. Mark said he was excited about getting paid this week, as he and a friend are going out to eat on Saturday.

NEXT STEPS

When will you provide the next service?

Friday, 03/14/25 at 10:00 at the worksite.

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

No

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.

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OVR SE 4 Kentucky Office of Vocational Rehabilitation

(rev. 10/2024) **Supported Employment Services Note**

Kentucky Career Center
Vocational Rehabilitation

BASIC INFORMATION

Individual Name	Individual Date of Birth
Mark Wilson	03/15/1989
Counselor Name	**Provider Name**
Heath Towland	ABC Agency
Employment Specialist Name	**Total billable hours**
Melinda Thomas	1
Date	
03/14/2025	

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SERVICE

Were services provided on this date performed onsite, offsite, or both? (Please choose)
On-site
What support services did you provide?
I met Mark at Atria Senior Living during his morning break. Mark said his confidence has grown significantly since working independently and hearing how well he is doing and how happy he is with his co-workers and supervisor. Mark stated he now greets all his co-workers by name. Mark said he has made friends with one of the co-workers, named Jim, and they are going out to lunch on Saturday as they got paid this week. He feels good about his job tasks, but he is still experiencing anxiety during mealtime. Mark said he knows Ricky and Mrs. Jones are always there to help him when needed.

RESULTS

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

I spoke with Mrs. Jones. Ricky was off today. She shared that Mark continues to work well with the staff, and she can tell he really enjoys interacting with the residents. He is still prompt in arriving at work each morning, and she can tell he is proud of working. She said that in observing Mark, she has noticed his anxiety has lessened, and his confidence has increased.

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

I learned that Mark has continued to reduce his anxiety during mealtimes by reviewing his flash cards beforehand. Mark stated he has memorized some of the residents' dietary needs and restrictions.

How is the individual achieving stability on the job?

Mark is achieving stability by continuing to build relationships with his co-workers. He continues to be willing to assist with tasks and training and to accept feedback when offered. He uses his flash cards each day during mealtimes and has memorized some residents' dietary needs and restrictions. Mark is much more confident in carrying out his work duties. Mark stated he led an activity for the residents this week, which he enjoyed.

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

Mark will continue to use his flash cards and ask questions of his supervisor and co-workers when needed. Mark will continue to memorize all his residents' dietary needs and restrictions.

How are you reducing your presence on the job site?

I have reduced my presence on the job site to one day per week, and I always encourage Mark to discuss any questions or concerns he has with Ricky or Mrs. Jones.

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

Reducing my time at the job site will further encourage Mark to ask questions and speak with his co-workers and supervisor about any issues or concerns he may have.

What additional information or insight was obtained?

Mark shared that he still enjoys working his shift independently, which continues to build his confidence. He is looking forward to lunch with Jim on Saturday, as he enjoys Jim's company and friendship.

NEXT STEPS

When will you provide the next service?

Tuesday 3/18/25 at the Library

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

No

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.

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OVR SE 4 **Kentucky Office of Vocational Rehabilitation**

(rev. 10/2024) **Supported Employment Services Note**

Kentucky Career Center
Vocational Rehabilitation

BASIC INFORMATION

Individual Name	Individual Date of Birth
Mark Wilson	03/15/1989
Counselor Name	**Provider Name**
Heath Towland	ABC Agency
Employment Specialist Name	**Total billable hours**
Melinda Thomas	2
Date	
03/18/2025	

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SERVICE

Were services provided on this date performed onsite, offsite, or both? (Please choose)
Off-site
What support services did you provide?
I met with Mark at the Library at 10:00 am. Mark said that he did not have much anxiety yesterday during mealtime, as he had been reviewing the flash cards the night before going to work and right before mealtime, but he was excited to be meeting with his therapist this week to discuss some coping strategies. He seemed excited to bring his flash cards with him so we could work on ways to help him memorize the dietary needs and restrictions of his residents. Mark and I discussed each resident's flash card and some ways to help him memorize their dietary needs and restrictions better. I asked him if his residents had a specific interest, and he said they did. Mark said that some of the specific interests his residents had were football, basketball, family, food, clothes, cars, travel, etc. We reviewed each flash card, and Mark stated the residents' interest. I suggested that he put on each resident's flash card their specific interest. He could write it on the flash card, draw a picture, or put a sticker of specific interest on it. For example, for the resident whose interest was football, write "football," draw a football, or put a football sticker on the flash card. Mark liked this suggestion as it would be a visual to help him better memorize each resident's dietary needs and restrictions. Mark wrote each resident's

specific interests on each flashcard. Mark and I left the library and went to the Dollar Tree to look for stickers. We found stickers representing each resident's specific interests and placed them on each flash card.

RESULTS

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

I did not speak with Mark's employer or coworker today.

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

I learned that Mark had reduced his anxiety this week by reviewing his flash cards the night before he goes to work and right before mealtime. Mark has an appointment with this therapist this week to discuss some coping strategies to help reduce his anxiety at mealtimes and work through his feelings when one of his residents goes to the hospital. Mark believes the pictures of each resident's interests will help him memorize their dietary needs and restrictions more effectively.

How is the individual achieving stability on the job?

Mark is achieving stability by consistently reviewing his flashcards the night before going to work and right before mealtime. This effort has boosted Mark's confidence by alleviating his fear of making mistakes.

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

Mark will continue to review his flash cards the night before he goes to work and right before mealtime. Mark will continue to memorize all of his residents' dietary needs and restrictions.

How are you reducing your presence on the job site?

Continuing to meet with Mark only one day per week at his worksite and encouraging him to continue working directly with co-workers and managers, seeking support from them when needed.

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

I encouraged Mark to continue asking questions and to ensure he speaks with his co-workers and supervisor when he has concerns.

What additional information or insight was obtained?

Mark shared that he enjoyed having lunch with his friend and coworker, Jim, at McDonald's on Saturday. He said he and Jim love sports, and they are both big fans of the University of KY basketball team. Mark stated his case manager called yesterday to inform him he was approved for SNAP benefits. He will receive $60.00 per week.

NEXT STEPS

When will you provide the next service?

Friday, 3/21/25 at 10:00 at the worksite.

Do you feel the individual has reached stability on the job? (Choose one)
No

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OVR SE 4 **Kentucky Office of Vocational Rehabilitation**

(rev. 10/2024) **Supported Employment Services Note**

Kentucky Career Center
Vocational Rehabilitation

BASIC INFORMATION

Individual Name	Individual Date of Birth
Mark Wilson	03/15/1989
Counselor Name	**Provider Name**
Heath Towland	ABC Agency
Employment Specialist Name	**Total billable hours**
Melinda Thomas	1
Date	
03/21/2025	

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SERVICE

Were services provided on this date performed onsite, offsite, or both? (Please choose)
On-site
What support services did you provide?
I met with Mark at Atria Senior Living today during his morning break. Mark said he really likes the stickers of his residents' interests on the flash cards, as they seemed to help reduce his anxiety at mealtime on Wednesday. He is still reviewing his flash cards the night before going to work and right before mealtime to help him memorize the dietary needs and restrictions of his residents. Mark stated he met with his therapist yesterday and discussed coping strategies to help reduce his anxiety during mealtimes and how to work through his feelings when faced with one of his residents going to the hospital. His therapist recommended the 4-7-8 breathing technique (inhale 4, hold 7, exhale 8) as a coping mechanism for anxiety. He recommended Mark do this breathing technique before mealtime and whenever he feels anxious. His therapist told Mark that using these breathing techniques, having a structured debrief with his supervisor, and taking a longer break will help him work through his feelings when one of his residents goes to the hospital.

RESULTS

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

I spoke with Mrs. Jones, and she shared positive feedback. Ricky was off today. Mrs. Jones shared that Mark continues to work well as a team member and gets along well with his co-workers. She shared that she observed Mark spending his breaks with another co-worker, Jim, and that Mark told her he and Jim had lunch this past Saturday. Mrs. Jones said she was glad to see Mark making friends at work, as this would provide him with more support. I discussed with Mrs. Jones that Mark was interested in any training he could do to advance within Atri Senior Living. Mrs. Jones said she would think about this, and we would discuss it later.

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

I learned that Mark is progressing very well in this position. Mark stated he used the breathing technique that his therapist had recommended yesterday, and it seemed to reduce his anxiety.

How is the individual achieving stability on the job?

Mark is still working two days per week without any on-site support from me. He is providing feedback to me about that day and is working well with co-workers and supervisors. Mark stated that the interest stickers on the flash cards are helping him memorize his residents' dietary needs and restrictions.

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

Mark will continue to review his flash cards the night before he goes to work and right before mealtime. Mark will continue to memorize all his residents' dietary needs and restrictions. Mark will continue to use his breathing technique when he feels anxious, especially before and during mealtime.

How are you reducing your presence on the job site?

I have continued to meet with Mark only once a week, during his morning break, on the job site, which allows him two days without an on-site visit. This gives him the opportunity to work alongside and learn from his co-workers.

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

I encouraged Mark to keep asking questions and to communicate with his co-workers and supervisor whenever he has concerns. Mark mentioned that he and his co-worker and friend, Jim, spend their breaks together discussing work and basketball.

What additional information or insight was obtained?

Mark shared that he really enjoys working at Atria Senior Living and is glad to have made a friend in Jim. I mentioned to Mark that I had discussed his interest in training programs to advance his position at Atria Senior Living with his supervisor, Mrs. Jones. She said she would think about this and get back to me later.

NEXT STEPS

When will you provide the next service?

Monday, 3/25/25 at 10:00 at the local library

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

No

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Kentucky Career Center
Vocational Rehabilitation

BASIC INFORMATION

Individual Name	Individual Date of Birth
Mark Wilson	03/15/1989
Counselor Name	**Provider Name**
Heath Towland	ABC Agency
Employment Specialist Name	**Total billable hours**
Melinda Thomas	1
Date	
03/25/2025	

For 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)
Off-site
What support services did you provide?
I met with Mark at the Library at 10:00 am. He shared that Monday went well and that he is enjoying working independently. He mentioned that Ricky and Mrs. Jones are available if he needs assistance. Mark said the breathing techniques he has been practicing have helped to reduce his anxiety during mealtime. Additionally, he remarked that the interest stickers on the flashcards are helping him memorize his residents' dietary needs and restrictions. Mark brought his flashcards so I could quiz him about the dietary needs and restrictions of each of his residents. I was impressed by how much he has improved since using the interest stickers; he has now memorized about two-thirds of his residents' dietary needs and restrictions.

RESULTS

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

I did not speak with Mark's employer today.

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

Mark stated that using the breathing technique that his therapist recommended is helping to reduce his anxiety at mealtimes. By using the interest sticker flash cards, he has memorized about two-thirds of his residents' dietary needs and restrictions. Mark stated he led an activity for the residents this week, which he enjoyed very much.

How is the individual achieving stability on the job?

Mark is still working two days per week without any on-site support from me. He is providing me with feedback on how things are going and is working well with co-workers and supervisors. Mark stated that the interest stickers on the flash cards are helping him remember his residents' dietary needs and restrictions.

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

Mark will continue to review his flash cards the night before he goes to work and right before mealtime. Mark will continue to memorize all his residents' dietary needs and restrictions. Mark will continue to use his breathing technique when he feels anxious, especially before and during mealtime.

How are you reducing your presence on the job site?

I will continue to increase natural support on the job by meeting with Mark on Fridays during his morning break, allowing him time to work alone with his coworkers.

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

I continue to encourage Mark to ask questions and to ensure he speaks with his co-workers and supervisor about any issues or concerns that may arise.

What additional information or insight was obtained?

Mark met with his case manager yesterday, and a one-bedroom apartment is becoming available; he is next on the list. His case manager will take him to the housing authority on Thursday to submit his paycheck stubs. Rent is income-based and includes all utilities. They have worked together to develop a budget, and Mark has money saved to cover both the first month's rent and the security deposit. Mark is excited about moving into an apartment near his work.

NEXT STEPS

When will you provide the next service?

Tuesday, 04/01/25 at 10:00 at the Library

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

No

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.

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.

OVR SE 6

(rev. 10/2024)

Kentucky Office of Vocational Rehabilitation
Supported Employment
Extended Services Plan

Kentucky Career Center
Vocational Rehabilitation

BASIC INFORMATION

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

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
ABC Agency	Mark Wilson
Employer	**Job Title or Function**
Atria Senior Living	Caregiver
Wage per hour	**Average hours per week**
$ 15.00	21
The consumer is 24 years old or younger (Choose one)	
No	

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?

I have transitioned to meeting monthly in person with Mark's supervisor, Samantha, to discuss Mark's progress at work and any feedback or recommendations she may have. She shared that Mark is doing a great job and continues to fit well in the Atria family. She has observed that his relationships with coworkers continue to flourish, and he has even hung out with some of them after work for pizza. She shared that Mark's performance review went very well. She feels that Mark demonstrates a solid understanding of care giving responsibilities, including assisting with daily living activities, ensuring client safety, communicating with his coworkers and her well. He does a fantastic job following care plans and can tell he has built confidence in following those plans for each person. Samantha said Ricky is still a natural support for Mark, but she has seen Mark problem-solve on his own more recently before utilizing Ricky if he does need something. She feels that Mark is becoming more confident and less stressed during meal times. She said Mark brought up the idea of increasing his weekly hours to 26, and she agreed and was open to increasing his hours. She is proud of Mark's progress and dedication, that increase in hours would take effect at the beginning of the next pay period. While I'm on-site speaking with Samantha, I will also take the opportunity to catch up with Mark at his job site. He mentioned that he feels it would be sufficient and helpful to drop in with him while touching base with Samantha.

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.

Mark and I have transitioned to meeting off-site twice a month, he feels that is sufficient. We met once at the library and once at Mark's new apartment. Mark has a nice apartment, he is all settled in, and his case manager has assisted him with obtaining things he needed for the apartment. She has also assisted him with reporting wages for Medicaid and his SNAP benefits, which are $60/week. Mark said he felt the performance review went well with Samantha. He said she provided him with good feedback on things he has improved, such as mealtime and tray dispersal, and on patient dietary restrictions. He said he felt nervous before he went in, but motivated and excited after the meeting. He expressed to her his desire to add 5 hours to his weekly schedule. Samantha agreed to this during the performance review. His current benefits analysis shows that he can work up to 26 hours a week at a rate of $15 per hour. Mark still has a long-term goal of being promoted to a trainer. He shared that goal with Samantha, and he said she felt positive about that goal and felt he could be helpful and supportive to others. Mark said he would like to revisit that goal in 6 months, he wants to be sure he adjust well to his new work hours. Mark said the bus route schedule is working out well. Sometimes he feels anxious about missing the bus, but he always revisits his flashcards, which list the correct times and locations. Mark will continue to meet with his therapist every month, where he is continuing to practice coping strategies and talk through situations that may arise that bring him anxiety.

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

Mark expressed that he feels increasingly confident at work each month and is grateful for the support he has received while transitioning into his role. He appreciates that Ricky is still available if he needs assistance, but he feels capable of handling more tasks on his own. Mark noted that even during meal times, when distributing trays, he feels more at ease. If he starts to feel anxious, he knows he can refer to his flashcards or use the coping strategies he developed during therapy. He also mentioned that the daily check-ins that Samantha conducts with each staff member help him feel "grounded" and prepared for the day, as she usually does this at the beginning of his shift.

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

Since Mark has been working for 90 days, he has been offered a 401k plan. Samantha has provided him with information about how much would be deducted from his paycheck, what the 401k account would look like, and how much they would match into the account. Mark expressed uncertainty during our meeting. Financially, he's unsure whether to proceed, particularly since he's still settling into his new apartment. He is going to take some time to read more about it and think it over. I discussed the pros and cons of having a 401 (k) and how it can be beneficial long-term. I suggested that Mark bring it up to his case manager as well; it helps to have multiple conversations and perspectives. Mark continues to have a clear transportation plan with the bus route, and can walk to work when needed. Once he has built up his savings account, he would still like to purchase a bike. I will follow back up with him on the 401(k) plan when we meet next month.

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?)
Marks will increase his hours by 5, which keeps him under any changes to his SSA benefits per his benefits analysis and meeting with the benefits counselor. This is one of his first goals since working, and in six months, he would like to revisit becoming a trainer to support new employees, which would be a career advancement. Mark and Samantha have both agreed to increase their hours, and the changes will be effective in the next pay period. Mark had been planning and saving for a get-together at his new apartment. Mark hosted the get-together over the weekend, and it was a great success. His friends, co-workers, and supervisor attended. He said having them over at his apartment made him feel even more like a "work family", and one of his friends ended up knowing Ricky, his co-worker, through church, which made the party a little sweeter. He felt like bonding with all the friends and support in his life, and having a job he loves in his own apartment has tremendously helped his mental health, mood, and motivation.

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.
Mark and I met at his apartment over coffee and discussed what supports and goals. I also spoke with his therapist, case manager, and supervisor, Samantha. They all were supportive of Mark increasing his hours weekly, and felt he would be ideal for a trainer role for new employees. "Mark is creative, thoughtful, and helpful. He has learned how to work through challenges and supports that worked for him on his new job. I think he would be a great trainer when he feels comfortable pursuing that role," shared Mark's therapist.

Number of Hours requested for extended services over the next 45 days.
Justification of hours requested
Mark is doing well and we feel that 3 hours would be an appropriate transition to give Mark to utilize his natural supports more frequently, but still have my support whenever he needs it.

Employment Specialist Signature

07/02/2025
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

OVR SE 3

(rev. 10/2024)

Kentucky Office of Vocational Rehabilitation
Job Acquisition Report

Kentucky Career Center
Vocational Rehabilitation

BASIC INFORMATION

Name of individual	Counselor Name
Mark Wilson	Heath Towland
Provider Name	**Employment Specialist Name**
ABC Agency	Melinda Thomas
Number of hours the Individual works monthly	**Estimated hours needed monthly for on and off site supports**
84.00	10.00

EMPLOYMENT INFORMATION

Employed/Start Date	Days working per week	Hours working per week
02/05/2025	3	21.00
Hourly Wages/Salary	**Does this wage qualify for a CRP Bonus Payment (Choose one)**	
$ 15.00	No	
Employer		
Atria Senior Living		
Employer Address		
300 E Market Street Louisville, KY 40202		
Supervisor/Contact Person		
Samantha Jones		
Job Description Attached (Choose one)		
No		
If no, please give a description of the job		
Mark will be responsible to support residents and individuals in the senior living facility through assisting them with daily living activities and ensure comfort, safety and well-being on everyday basis. He will be responsible for personal care of residents through assisting with personal hygiene care and routines of bathing, grooming, dressing, and using the restroom. He will perform housekeeping tasks such as changing bed linens. washing laundry, vacuuming/mopping room, and other tasks to maintain clean and healthy living environment. Mark will provide companionship to residents through engaging them in recreational activities, reducing feelings of loneliness, and offer emotional support. Additionally, he will help in monitoring health of residents through giving medication, assist in following specific dietary needs or restrictions, and provide CPR in emergencies. Lastly, Mark will communicate with family or visitors of the resident when present.		

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

If no, contact the counselor to discuss an amendment.

Does this job match the individual's interests? (Choose one)
Yes
If no, explain why this job was acquired for the individual?
Employer Benefits (list all that apply)
He will be offered to have a 401k after 90 days of employment upon completion of probationary period. He is not offered medical insurance as they only offer that to full time employees.
Is the employer paying at least 51% of medical insurance? (Choose one)
No

SUPPORT INFORMATION

What on-site supports do you plan to provide to the Individual?
I plan to meet with the supervisor twice a week during the first month of the job to assist Mark in adapting to work environment, learning layout of facility and where to clock in and out for shifts, creating online employee portal to see pay stubs and schedule, shadow him performing tasks during recreational activities or mealtime, and address any concerns during beginning work.
What off-site supports do you plan to provide to the Individual?
I plan to help Mark to open a bank account to receive his paychecks from work, budgeting, facilitating meetings with case manager to learn about food stamps and housing assistance, submit paystubs to DCBS office once starting work, practice bus routes, check in with him to monitor progress on the job, finding ongoing training for him to improve and refine skills for caregiving, and review coping skills if he faces triggers on the job.
How do you plan to identify natural supports?
I plan to have ongoing communication with his current natural support (his friend John) to ensure comfortability and satisfaction with the job and identify any needs that are not addressed. I will help Mark to find natural supports on the job through communication with his supervisor, Mrs. Jones and through check-ins with him to build community with co-workers.

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.

OVR SE 5

(rev. 10/2024)

Kentucky Office of Vocational Rehabilitation
Employment Stability Assessment Form

Kentucky Career Center
Vocational Rehabilitation

SUPPORTED EMPLOYMENT SERVICES PROVIDED

Purpose for this report		
Monthly Report during Supported Employment Services		
Hours on-site	**Hours off-site**	**Total hours of support**
8.00	2.00	10.00

BASIC INFORMATION

Individual Name	**Date**
Mark Wilson	02/28/2025
Job Title	**Employment Specialist**
Caregiver	Melinda Thomas
Date of Employment	**Provider Name**
02/05/2025	ABC Agency
Place of Employment	**OVR Counselor**
Atria Senior Living	Heath Towland
Average hours working per week	**Month of Assessment**
24.00	February 2025
Days Employed	**First Day of Employment Stability**
18.00	

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 EMPLOYMENT STABILITY

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

Yes

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)

Yes

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

No

If yes, provide information verifying your response.

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

Mark still struggles with remembering the dietary needs and restrictions of his residents at times

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

Yes

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

Natural supports on the job are Mrs. Jones, Mark's direct supervisor and shift lead Ricky. Mrs. Jones has provided feeback on Mark's progress and Ricky ahs provided on the job training, job shadowing and assistance as needed.

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

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

Yes

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)

No

If not, what specific services are required?

Mark continues to struggles with remembering the dietary needs and restrictions, he will need to study his flash cards and has required I still do on-site follow ups with him and his supervisor weekly during the next month of employment.

ADDITIONAL QUESTIONS

Please answer the following questions.

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

Yes

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)

Yes

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

No

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)
Yes
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)
Yes
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)
8
If the rating is 9 or below, what keeps it form being a higher rating and what is the plan for achieving employment stability?
Mark is still working with observation and needs additional supports in learning the dietary needs and restrictions of his residents. He uses his flash cards but can get overwhelmed and feel rushed during lunch. He has accepted assistance and may need to explore other methods of keeping track with myself, his supervisor as well as speak with this therapist about coping skills when he feels overwhelmed or anxious about the task.
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 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.

OVR SE 5

(rev. 10/2024)

Kentucky Office of Vocational Rehabilitation
Employment Stability Assessment Form

Kentucky Career Center
Vocational Rehabilitation

SUPPORTED EMPLOYMENT SERVICES PROVIDED

Purpose for this report		
Monthly Report during Supported Employment Services		
Hours on-site	**Hours off-site**	**Total hours of support**
8.00	2.00	10.00

BASIC INFORMATION

Individual Name	**Date**
Mark Wilson	02/28/2025
Job Title	**Employment Specialist**
Caregiver	Melinda Thomas
Date of Employment	**Provider Name**
02/05/2025	ABC Agency
Place of Employment	**OVR Counselor**
Atria Senior Living	Heath Towland
Average hours working per week	**Month of Assessment**
24.00	February 2025
Days Employed	**First Day of Employment Stability**
18.00	

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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)
Yes
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)
Yes
3. Does the individual's job performance meet the expectations of the employer? (Choose one)
No
If yes, provide information verifying your response.
If not, what is/are the specific concern(s) and how will this be resolved?
Mark still struggles with remembering the dietary needs and restrictions of his residents at times
4. Are natural supports appropriate and in place? (Choose one)
Yes
If yes, what are the specific natural supports that are in place?
Natural supports on the job are Mrs. Jones, Mark's direct supervisor and shift lead Ricky. Mrs. Jones has provided feeback on Mark's progress and Ricky ahs provided on the job training, job shadowing and assistance as needed.
If not, what are your next steps to establish appropriate natural supports?
5. Are all necessary accommodations appropriate and in place? (Choose one)
Yes

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)
No

If not, what specific services are required?
Mark continues to struggles with remembering the dietary needs and restrictions, he will need to study his flash cards and has required I still do on-site follow ups with him and his supervisor weekly during the next month of employment.

ADDITIONAL QUESTIONS

Please answer the following questions.

Is the job consistent with the Person-Centered Employment Plan (PCEP)/Career Profile/Vocational Profile? (Choose one)
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Has competitive integrated employment been achieved? (Choose one)
Yes
Have any existing conflicts or concerns with benefits (i.e., SSI/SSDI) due to employment been resolved? (Choose one)
No

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)
Yes
If not, what is/are the issue(s)? How will this be resolved?
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If hours have decreased, what is/are the reason(s) for this?

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OVR SE 6

(rev. 10/2024)

Kentucky Office of Vocational Rehabilitation
Supported Employment
Extended Services Plan

Kentucky Career Center
Vocational Rehabilitation

BASIC INFORMATION

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

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Provider Name	Name of individual
ABC Agency	Mark Wilson
Employer	**Job Title or Function**
Atria Senior Living	Caregiver
Wage per hour	**Average hours per week**
$ 15.00	21
The consumer is 24 years old or younger (Choose one)	
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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?

I have transitioned to meeting monthly in person with Mark's supervisor, Samantha, to discuss Mark's progress at work and any feedback or recommendations she may have. She shared that Mark is doing a great job and continues to fit well in the Atria family. She has observed that his relationships with coworkers continue to flourish, and he has even hung out with some of them after work for pizza. She shared that Mark's performance review went very well. She feels that Mark demonstrates a solid understanding of care giving responsibilities, including assisting with daily living activities, ensuring client safety, communicating with his coworkers and her well. He does a fantastic job following care plans and can tell he has built confidence in following those plans for each person. Samantha said Ricky is still a natural support for Mark, but she has seen Mark problem-solve on his own more recently before utilizing Ricky if he does need something. She feels that Mark is becoming more confident and less stressed during meal times. She said Mark brought up the idea of increasing his weekly hours to 26, and she agreed and was open to increasing his hours. She is proud of Mark's progress and dedication, that increase in hours would take effect at the beginning of the next pay period. While I'm on-site speaking with Samantha, I will also take the opportunity to catch up with Mark at his job site. He mentioned that he feels it would be sufficient and helpful to drop in with him while touching base with Samantha.

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.

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Mark expressed that he feels increasingly confident at work each month and is grateful for the support he has received while transitioning into his role. He appreciates that Ricky is still available if he needs assistance, but he feels capable of handling more tasks on his own. Mark noted that even during meal times, when distributing trays, he feels more at ease. If he starts to feel anxious, he knows he can refer to his flashcards or use the coping strategies he developed during therapy. He also mentioned that the daily check-ins that Samantha conducts with each staff member help him feel "grounded" and prepared for the day, as she usually does this at the beginning of his shift.

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

Since Mark has been working for 90 days, he has been offered a 401k plan. Samantha has provided him with information about how much would be deducted from his paycheck, what the 401k account would look like, and how much they would match into the account. Mark expressed uncertainty during our meeting. Financially, he's unsure whether to proceed, particularly since he's still settling into his new apartment. He is going to take some time to read more about it and think it over. I discussed the pros and cons of having a 401 (k) and how it can be beneficial long-term. I suggested that Mark bring it up to his case manager as well; it helps to have multiple conversations and perspectives. Mark continues to have a clear transportation plan with the bus route, and can walk to work when needed. Once he has built up his savings account, he would still like to purchase a bike. I will follow back up with him on the 401(k) plan when we meet next month.

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?)
Marks will increase his hours by 5, which keeps him under any changes to his SSA benefits per his benefits analysis and meeting with the benefits counselor. This is one of his first goals since working, and in six months, he would like to revisit becoming a trainer to support new employees, which would be a career advancement. Mark and Samantha have both agreed to increase their hours, and the changes will be effective in the next pay period. Mark had been planning and saving for a get-together at his new apartment. Mark hosted the get-together over the weekend, and it was a great success. His friends, co-workers, and supervisor attended. He said having them over at his apartment made him feel even more like a "work family", and one of his friends ended up knowing Ricky, his co-worker, through church, which made the party a little sweeter. He felt like bonding with all the friends and support in his life, and having a job he loves in his own apartment has tremendously helped his mental health, mood, and motivation.

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.
Mark and I met at his apartment over coffee and discussed what supports and goals. I also spoke with his therapist, case manager, and supervisor, Samantha. They all were supportive of Mark increasing his hours weekly, and felt he would be ideal for a trainer role for new employees. "Mark is creative, thoughtful, and helpful. He has learned how to work through challenges and supports that worked for him on his new job. I think he would be a great trainer when he feels comfortable pursuing that role," shared Mark's therapist.

Number of Hours requested for extended services over the next 45 days.
Justification of hours requested
Mark is doing well and we feel that 3 hours would be an appropriate transition to give Mark to utilize his natural supports more frequently, but still have my support whenever he needs it.

07/02/2025

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

OVR SE 6

(rev. 10/2024)

Kentucky Office of Vocational Rehabilitation
Supported Employment
Extended Services Plan

Kentucky Career Center
Vocational Rehabilitation

BASIC INFORMATION

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

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
ABC Agency	Mark Wilson
Employer	**Job Title or Function**
Atria Senior Living	Caregiver
Wage per hour	**Average hours per week**
$ 15.00	21
The consumer is 24 years old or younger (Choose one)	
No	

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?

I have transitioned to meeting monthly in person with Mark's supervisor, Samantha, to discuss Mark's progress at work and any feedback or recommendations she may have. She shared that Mark is doing a great job and continues to fit well in the Atria family. She has observed that his relationships with coworkers continue to flourish, and he has even hung out with some of them after work for pizza. She shared that Mark's performance review went very well. She feels that Mark demonstrates a solid understanding of care giving responsibilities, including assisting with daily living activities, ensuring client safety, communicating with his coworkers and her well. He does a fantastic job following care plans and can tell he has built confidence in following those plans for each person. Samantha said Ricky is still a natural support for Mark, but she has seen Mark problem-solve on his own more recently before utilizing Ricky if he does need something. She feels that Mark is becoming more confident and less stressed during meal times. She said Mark brought up the idea of increasing his weekly hours to 26, and she agreed and was open to increasing his hours. She is proud of Mark's progress and dedication, that increase in hours would take effect at the beginning of the next pay period. While I'm on-site speaking with Samantha, I will also take the opportunity to catch up with Mark at his job site. He mentioned that he feels it would be sufficient and helpful to drop in with him while touching base with Samantha.

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.

Mark and I have transitioned to meeting off-site twice a month, he feels that is sufficient. We met once at the library and once at Mark's new apartment. Mark has a nice apartment, he is all settled in, and his case manager has assisted him with obtaining things he needed for the apartment. She has also assisted him with reporting wages for Medicaid and his SNAP benefits, which are $60/week. Mark said he felt the performance review went well with Samantha. He said she provided him with good feedback on things he has improved, such as mealtime and tray dispersal, and on patient dietary restrictions. He said he felt nervous before he went in, but motivated and excited after the meeting. He expressed to her his desire to add 5 hours to his weekly schedule. Samantha agreed to this during the performance review. His current benefits analysis shows that he can work up to 26 hours a week at a rate of $15 per hour. Mark still has a long-term goal of being promoted to a trainer. He shared that goal with Samantha, and he said she felt positive about that goal and felt he could be helpful and supportive to others. Mark said he would like to revisit that goal in 6 months, he wants to be sure he adjust well to his new work hours. Mark said the bus route schedule is working out well. Sometimes he feels anxious about missing the bus, but he always revisits his flashcards, which list the correct times and locations. Mark will continue to meet with his therapist every month, where he is continuing to practice coping strategies and talk through situations that may arise that bring him anxiety.

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

Mark expressed that he feels increasingly confident at work each month and is grateful for the support he has received while transitioning into his role. He appreciates that Ricky is still available if he needs assistance, but he feels capable of handling more tasks on his own. Mark noted that even during meal times, when distributing trays, he feels more at ease. If he starts to feel anxious, he knows he can refer to his flashcards or use the coping strategies he developed during therapy. He also mentioned that the daily check-ins that Samantha conducts with each staff member help him feel "grounded" and prepared for the day, as she usually does this at the beginning of his shift.

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

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Marks will increase his hours by 5, which keeps him under any changes to his SSA benefits per his benefits analysis and meeting with the benefits counselor. This is one of his first goals since working, and in six months, he would like to revisit becoming a trainer to support new employees, which would be a career advancement. Mark and Samantha have both agreed to increase their hours, and the changes will be effective in the next pay period. Mark had been planning and saving for a get-together at his new apartment. Mark hosted the get-together over the weekend, and it was a great success. His friends, co-workers, and supervisor attended. He said having them over at his apartment made him feel even more like a "work family", and one of his friends ended up knowing Ricky, his co-worker, through church, which made the party a little sweeter. He felt like bonding with all the friends and support in his life, and having a job he loves in his own apartment has tremendously helped his mental health, mood, and motivation.

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.
Mark and I met at his apartment over coffee and discussed what supports and goals. I also spoke with his therapist, case manager, and supervisor, Samantha. They all were supportive of Mark increasing his hours weekly, and felt he would be ideal for a trainer role for new employees. "Mark is creative, thoughtful, and helpful. He has learned how to work through challenges and supports that worked for him on his new job. I think he would be a great trainer when he feels comfortable pursuing that role," shared Mark's therapist.

Number of Hours requested for extended services over the next 45 days.
Justification of hours requested
Mark is doing well and we feel that 3 hours would be an appropriate transition to give Mark to utilize his natural supports more frequently, but still have my support whenever he needs it.

07/02/2025

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

OVR SE 7

(rev. 10/2024)

Kentucky Office of Vocational Rehabilitation
Extended Services Report

Kentucky Career Center
Vocational Rehabilitation

1. BASIC INFORMATION

Individual Name	Counselor Name
Mark Wilson	Heath Towland
Provider Name	**Employment Specialist Name**
ABC Agency	Melinda Thomas
Is this consumer between the ages of 14 and 24? (Choose one)	**If yes, have you requested an authorization for Extended Services for youth? (Choose one)**
No	No

Is the individual's employment stable? (Choose one)
Yes
If no, how will you assist the individual in obtaining employment stability?

If no, contact the counselor.

Ongoing supports will be provided (Choose one)	Total Billable Hours for Extended Services for youth
Both	6.0

Reminder

If the consumer 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 consumer 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 below a description of the services provided and the date and time spent for each extended service you provided for the month.

Date	Hours	Activity
04/01/2025	1.00	Building rapport with coworkers and communication with supervisor

Result

Mark and I met at the library to talk about his comfort level with me starting to transition to seeing him once a week, onsite, and us meeting at the library to talk through his day at work. Mark shared that he felt a bit nervous not having me there, because it "is just something different." We discussed his natural supports at work and his coping strategies. Mark stated that he felt better. We also discussed possible ways he could build rapport with coworkers by asking one of them to join him for lunch.

Date	Hours	Activity
04/03/2025	0.50	Support on-site

Result

Mark and I met at his job during his lunch break, where he was joined by his coworkers, Ricky and Josh. I noticed that Mark mentioned that they started having lunch together yesterday and were discussing their mutual enjoyment of being outdoors. Josh shared that there was a hiking group that he participates in on the weekend and invited both Ricky and Mark to join him if they wanted. Mark looked excited and looked at me for reassurance, and he agreed.

Date	Hours	Activity
04/04/2025	1.00	Building rapport with coworkers

Result

Mark and I met at the library to talk about the invitation to the hiking club that Josh invited him and Ricky to. Mark was feeling a little nervous, but was very excited to have something more to do on the weekends and get him out. We talked through transportation, essentials for the hike, and discussed polite ways to leave if he wanted to end the hike early or even to decline in the future if he ends up not enjoying himself, as these were things he felt anxious about.

Date	Hours	Activity
04/07/2025	0.50	Support On-site

Result

Mark and I met at his job during his lunch break, and he was once again joined by his coworkers, Ricky and Josh. Ricky wasn't able to join the hike over the weekend due to other commitments, so Josh and Mark will share how the hike went and the trails. Mark smiled and was animated, retelling his fall into the passing stream, where Josh went to pull him up and fell next to him. Josh and Mark laughed, reminiscing about the moment. Ricky plans to join them on their next hike. On my way to leave, I stopped by Samantha's office to check in on how Mark is adjusting since I have been transitioning. Samantha stated that Mark is continuing to do a good job and no concerns.

Date	Hours	Activity
04/11/2025	0.50	Housing, Transportation, and supports

Result

Mark and I met at his new apartment. Mark gave me a tour of his place and showed me a list he made of things he needed to buy, such as a coffee maker, a welcome mat, etc. We talked about his transportation, and Mark felt confident in his transportation plan along with his apartment. Mark shared that he meets with his case manager in a couple of weeks. He shared that he and his therapist are still continuing to meet weekly to check in. He stated that he feels less anxious and happier.

Date	Hours	Activity
04/14/2025	0.50	Rapport and Work Goals

Result

Mark and I met at the library, where he shared that things are going well with his coworkers and he looks forward to work and his weekends. I asked Mark if he has had any trouble with his stamina since the increased activity of hiking on the weekends. Mark shared that he was a little sore from the first hiking trail since he fell, but since he hasn't had any trouble. He feels the hiking club has been the opposite and has been an energy boost for him. I asked him about his performance review in May and his goals. Mark felt more confident and expressed that he was nervous at first, but he had spoken to Samantha about it and what to expect. He wanted us to prepare, once it is a little closer to practice, what to say and also support filling out his portion of the performance evaluation.

Date	Hours	Activity
04/18/2025	0.50	Support On-site

Result

Today, I observed Mark on the job with his patients and providing care. He was confident and empathetic, and the patients seemed to enjoy his company. Mark has given nicknames to the patients, and they have their own "handshake" they do to greet one another. Before I left, Samantha stopped me and said that she was glad I was able to see Mark with his residents today and the relationship he has built with them. She said that the families and residents have given high remarks about Mark and his care, along with his positive nature.

Date	Hours	Activity
04/21/2025	1.0	Job Satisfaction and continue step down support

Result

Mark and I met at his apartment so we could chat while he put away his clothes. Mark admitted that he got a little behind unpacking his things since joining the hiking club on the weekends. Mark stated that he hasn't "felt this happy and calm in a long time." Mark continued to share that he feels close to his patients, coworkers, and supervisor. We talked about step-down supports for May and what that could look like. Mark shared that he was sad to see me less, but at the same time, was proud of himself. We talked through all his natural supports and what they could support him with, and what he felt comfortable with for our next steps to transition.

Date	Hours	Activity
04/28/2025	0.50	Continued Step Down Support

Result
Mark and I met at the library to talk through a plan of support and what that would look like from his natural supports and from me for May. We discussed once-a-week meetings to check in here at the library or at his apartment, along with support preparing for his performance evaluation, and once on-site for his performance evaluation. We discussed on-site support for his performance evaluation and what that would possibly look like, and Mark stated for moral support. I will be reaching out to Samantha to see if this is a possibility.

Date	Hours	Activity

Result

Use this space if additional dates, times, activities, and results have been provided.
Mark shared that support for step-down supports would be mainly moral support and reminders of who could additionally support him, and to help prepare him for his performance evaluation. We will meet on May 9th to discuss his long-term support plan and schedule a day to solely focus on his performance evaluation.

Number of hours	Date Completed
6	04/28/2025

Submit to OVR by the 5th day of the subsequent month to the OVR Counselor.

OVR SE 7

(rev. 10/2024)

Kentucky Office of Vocational Rehabilitation
Extended Services Report

Kentucky Career Center
Vocational Rehabilitation

1. BASIC INFORMATION

Individual Name	Counselor Name
Mark Wilson	Heath Towland
Provider Name	**Employment Specialist Name**
ABC Agency	Melinda Thomas
Is this consumer between the ages of 14 and 24? (Choose one)	**If yes, have you requested an authorization for Extended Services for youth? (Choose one)**
No	No

Is the individual's employment stable? (Choose one)
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If no, how will you assist the individual in obtaining employment stability?

If no, contact the counselor.

Ongoing supports will be provided (Choose one)	Total Billable Hours for Extended Services for youth
Both	6.00

Reminder

If the consumer 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 consumer in supported employment.

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

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DESCRIPTION AND SCHEDULE OF EXTENDED SERVICES PROVIDED FOR THE MONTH

Please enter below a description of the services provided and the date and time spent for each extended service you provided for the month.

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Number of hours	Date Completed
6	04/28/2025

Submit to OVR by the 5th day of the subsequent month to the OVR Counselor.

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: 11/08/24
Date of birth: 03/15/89
Social Security#: 123-456-7890

Name: Mark J. Wilson

Preferred Pronouns: He/Him

Address: 123 Pleasant Way, Louisville, KY 40980

Email: marksinthehouse@gmail.com

Phone number/s: 773-123-4567

Best way to reach: Cell phone

Case Manager: Referral made - pending

Therapist: Keith Hall

Office of Vocational Rehabilitation Counselor: N/A – referral given to IPS

☐ Referral sent to Office of Vocational Rehabilitation

Other healthcare/social service providers: Unknown

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? Mark has been in therapy at Horizon Healthcare since June of 2023 when he moved here from Chicago, IL.

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

Mark did not want to return to work when he moved to Kentucky to help family members needing eldercare. Unfortunately, his grandparents have passed, and he is ready to return to work. Mark says he has worked lots of jobs, unknown what he really wants to do now.

Is this person interested in further education to advance his/her career goals? No

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? Mark states he uses alcohol and marijuana socially, while I suspect he uses them more frequently than reported to me. He has a diagnosis of bipolar disorder with psychotic features.

What are some of the person's strengths? (*Experience, training, personality, support, etc.*)
Mark is willing to work with IPS to help him return to work and find a job. He has never held a job in the past a year and seems to job hop. He plans to remain in KY and has always been on time for his appointments with me.

What job (type of job, hours, etc.) would be a good match? Not sure.

Recoverable Signature

X Keith Hall

Person Making
Referral Date
Signed by: b4ff29cd-0b6e-47f8-bfab-4c8073589469

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.*) Mark has been a caregiver for his grandparents who recently passed away. Mark moved from Chicago, IL to assist with their care and was living with them in their apartment in downtown Louisville, KY. Mark will need to find a new apartment in the next two months and his therapist has made a referral to case management to help him in this area. Mark admits that he has been lost without his grandparents, as they are the ones who raised him, and he does not have any contact with his birth parents. Mark states he is not sleeping well at night, but he would prefer to have a day shift or second shift job. He states now that he walks around the neighborhood and talks with people and is just "hanging out" most days. He does not have a car and relies on public transportation. Mark admits he has a laid-back lifestyle right now, with not many responsibilities but has stated, "Yeah, I really need to get my act together and get a job so I can have some money and a girlfriend."

What would be a perfect day for you — including work/school? Mark states that this is hard for him to answer, but he always goes back to the same answer that he really wants to have a girlfriend and his own place. He talks a lot about missing being in Chicago, but states he is liking Louisville and has met some guys in the neighborhood that he likes to spend time with. Mark also states that it is less expensive to live in Louisville than Chicago. He does not rule out, returning there at some point, but not right now. Mark does want to work during the day and wants to be able to get to work on the bus line that will not take all day, as he has stated the bus lines are not reliable sometimes.

What time of day do you feel your best? Mid-afternoon – Mark is enjoying his time with friends right now since he is not working and has been sleeping in. Mark does say that he can adjust to this if he gets a job that is in the morning. I met Mark after 1:00 and he is always upbeat and alert and talkative with me.

Are there places in your neighborhood that you like to go to? Mark states he likes "hitting the

streets" with the guys and they will hang out in his (grandparents) apartment, or he will hang at their places. Mark is not afraid of walking long distances, sometimes, walking several miles daily. He will walk to stores for food or convenience stores for things he needs. Mark states he likes knowing where he is and is still exploring the Louisville area.

Do you belong to clubs, groups, a church, etc.? He does not and states he is not interested in joining any group "stuff."

What hobbies or interests do you have? Mark loves being outside, no matter what the weather. Most of our conversations have taken place with me walking around with Mark. The more we walk, the more he talks! He is very observant of people, knowing when stores open and who works there, etc. Mark is also very sociable and is interested in what people are doing. He is also brutally honest with people; he has introduced me as "the lady that's going to get me a good job." Overall, Mark loves physical activity, hanging out with friends, watches very little TV and enjoys cooking simple meals for himself. Mark walks to the grocery store regularly to get supplies for various meals he cooks for himself. Mark is on food stamps and receives food from local shelters.

Work Goal

What are your strengths? (*What do you enjoy doing? What compliments have you received? How do you interact with technology?)* Mark is personable, friendly, caring, considerate, dependable and interacts well with others. Mark said he is organized and likes everything neat and orderly. Mark's therapist, Keith, said Mark is pleasant to be around and has always been on time with his appointments. Mark said he can use a computer doing emails but that is about it.

What kind of work have you always wanted to do, and what about this work that interests you? Mark has done a variety of jobs such as fast food, janitorial and caring for his grandparents. Mark wants a job where he can interact with others and use his organizational skills.

What are your Top 5 Jobs that interest you and why? Mark said his top five jobs would be a caregiver at an assisted living facility as he enjoyed caring for his grandparents and making them smile. He said he would prefer to work at Atria Senior Living, but would consider working at Hillcrest Village, Riverview Village, Treyton Oak Towers and Eastern Star Home in KY. I do plan to explore multiple businesses, with Mark, within the range he wants to work, just to ensure that this is the field that he wants to work in. We will be exploring these locations during career profile development.

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?)*** Mark expressed a strong desire to work as a caregiver at Atria Senior Living, which is conveniently located near his friend John's apartment complex. This proximity allows him to walk to work, alleviating concerns about relying on public transportation, which he finds to be unreliable at times. Mark believes that working at an assisted living facility would be a perfect fit for him, as he enjoys interacting with others and strives to bring smiles to their faces. He believes that this role would provide him with both personal satisfaction and the opportunity to connect with residents. He is not interested in fast food jobs, citing the stress associated with that kind of work. Instead, Mark is motivated to find a job that will not only help him pay for rent but also allow him to build new friendships and potentially meet someone special. This job is essential to him for both financial reasons and personal growth.

Mark expressed interest in visiting Atria Senior Living to explore its facilities and job opportunities. Mark and I visited Atria Senior Living and spoke to the facility director, Mrs. Jones. We found it to be a beautiful facility built in 2020, featuring 85 beds. Mark noted how clean the facility was. Mrs. Jones mentioned that they needed two caregivers and an activities coordinator. One of the caregiver positions was for the daytime, while the other was for the evening. The activities coordinator position was also a daytime role. The hours for the daytime positions are from 9:00 AM to 3:00 PM, and the evening caregiver position is from 3:00 PM to 8:00 PM.

Mrs. Jones informed us that we can find more details about these positions on the Atria Senior Living website. If Mark is interested, she encouraged him to go ahead and apply, as she plans to start interviews for these positions in a couple of weeks. Mark thanked Mrs. Jones and said that he would check out the daytime caregiver position and apply if he thought it was a good fit for him.

Mark told me that he could see himself working at Atria Senior Living, as Mrs. Jones seemed caring and friendly.

What other preferences do you have for a job? (*What careers would you like to learn more about)?* Mark wants to work for an employer that cares for their employees and understands when he needs to take off for his therapy appointments. Mark expressed an interest in becoming a Certified Nursing Assistant (CAN) and enjoys working with people.

How many hours per week do you want to work? Mark wants to work 6 hours per day; 5 days per week then go full-time once he feels comfortable in his job.

How many hours each day do you want to work? 30 hours per week.

Could you work the First, Second, or Third Shift? Mark wants to work the first shift, preferably 10:00 am to 5:00 pm.

Could you work weekends if necessary? Mark said he is willing to work weekends.

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. Mark said it did not matter to him whether his supervisor was male or female.

Do you have two forms of Identification? (Picture ID, Social Security Card, etc.? Mark has a birth certificate and a Social Security card. Mark does not have an ID, so I will assist him in obtaining one or finding him a resource person at our agency to help him.

Supports

Who can help us think about jobs you would enjoy? Mark said his therapist, Keith, and his best friend, John, could help us think about jobs he would enjoy.

☒ **An appointment was made with this person to discuss jobs. If not, why?** Mark has an appointment with his therapist, Keith, at 1:30 pm on Tuesday, November 25th, and has invited me to attend this session. Mark signed a release permitting me to talk with his best friend, John. I will call John tomorrow to set up an appointment to meet and document my conversations in this report.

What types of jobs do your friends and family members hold? What do you think about those jobs? Mark said his friend, John, works at Walmart as a stocker. Mark said John was his best friend and they get along well as they both like things to be orderly and organized. John always stays and helps Mark tidy up when having friends over.

Do you know anyone working in your desired field? If so, could this person(s) be helpful in your job search? Mark said his best friend, John, works as a stocker at Walmart and loves it because he enjoys organizing things too. Mark feels John would be helpful in his job search so I plan to call John tomorrow to set up a time to meet with him.

Once you are employed, who would be a good person to support you? Why have you chosen this person(s)? Mark said his best friend, John, would be a good person to support him. John is one of the first people Mark met when moving to Kentucky. They have been best friends ever since and visit at least twice weekly. Mark and John usually walk around the neighborhood and then play a card game called “Monopoly Deal.” Mark said his therapist, would also be a good person to support him as he sees him monthly. Mark went on to say that his therapist has provided him with much-needed life coping skills and moral support since moving to Kentucky.

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? Mark said his best friend, John, would be a good person to contact to ensure he is okay as they see each other at least twice a week.

Adult Education ☐ N/A

Adult Age Range: 25+

Are you interested in attending school or vocational training to advance your work career? Mark states that he is interested in attending school to become a CNA or SRNA, with the goal of working as a caregiver in a local nursing home or hospital. He thinks that this would be a good option for him due to his medical experience in the military as a Navy Corpsman and says that he "does not drink or smoke when he knows he is taking care of someone else". He is open to becoming a CNA because it reminds him of taking care of his grandparents, and he wants to help other families in the same way he helped his own. He would like to speak with someone at Jefferson Community and Technical College to determine if they offer any programs that align with his interests and if his Navy medical training could be applied to these courses. After exploring programs at JCTC, we found that they offer a medical assisting program. We plan to arrange a meeting with them to learn more and determine the completion time. The school offers a mix of online and in-person classes and is conveniently located on a bus route.

Tell me about your education history: High School/College/Certificate/Community College/Vocational Training? He attended High School at Lincoln Park High School where he graduated in May 2007. He received a few certificates during his time in the military between 2012-2016 but has a hard time remembering all of them. He mentioned a certificate in CPR/BLS and medical assistant training.

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?)* Mark states that he learns best by hands-on or doing the activity directly. He wants to be able to try things out once he is taught them or having someone show him exactly what he needs to do and how to do it. While he was in high school, he said he was an "average" student and passed his classes but did not complete advanced classes nor was recognized for anything special. He said that his time in JROTC was what prepared him for school and why he chose to go into the Navy years after high school and trying out some jobs.

Did you have any accommodations in school? Yes ☐ No ☒

If yes, please describe the accommodation(s) received. ☐ N/A

Do you have copies of the degrees, licenses, and certificates you earned? Please also list the dates any degree, license, or certificate was obtained. Mark initially thought he did not have any of his degrees and certificates. But he does have his DD214 and together, we were able to obtain a copy of his high school diploma and certificates from the Navy. He said he had thought he lost these while moving and was thrilled to know he had this information.

What training, such as certificates, licenses, or degrees, will support your work goal? If he decides to become a CNA/SRNA, he said that the certificates from the Navy about CPR and medical assistant training would support that goal.

What other preferences do you have for additional education or job/vocational training? Mark stated that he does not have any other preferences at the time for any other education or job/vocational training but is open to talking about it at a later date once he is working.

Would you like assistance learning about financial aid opportunities for education programs? Mark would like assistance in learning about financial aid opportunities if he chooses to go the CNA/SRNA training route and makes the decision of what school to look at.

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.

Plans for School and Training ☐ N/A

Adult/Youth

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.

What do you need to start school? (Access to a computer, Computer Literacy, Quiet place to study, Transit card, etc.) If he returns to school to become a CNA/SRNA, he said he would need someone to help him with "learning how to get to my classes on time and where the buildings are", a laptop for homework and online classes, help in "understanding how to work a computer", and finding places to study at or someone to study with.

Do you have any challenges with the following:			
			Comments
Being called on in class	☒ Okay	☐ Problem	Click here to enter text.
Social situations	☒ Okay	☐Problem	Click here to enter text.
Taking tests	☐ Okay	☒ Problem	He gets anxiety when taking tests and gets worried that he may not remember the material at that moment and does not want to fail a class.
Learning from lecture	☒ Okay	☐ Problem	Click here to enter text.
Learning by reading	☒ Okay	☐ Problem	Click here to enter text.
Learning hands-on	☒ Okay	☐ Problem	Click here to enter text.
Concentration	☒ Okay	☐ Problem	Click here to enter text.
Memory	☐ Okay	☒ Problem	He said he has a hard time remembering new information, especially if it's something that he learned on a computer or had to read on his own. He prefers hands-on activities or study tips, such as flashcards, when it involves a lot of information. He can get overwhelmed easily and would not want to take many classes at the same time.
Using computers	☐Okay	☒ Problem	He is unfamiliar with many computer functions, as his work and military experience did not involve computer use. He said he remembers a few things on the computer from high school, but that was "a long time ago, and computers have changed a lot since then".

Do you have any student debt? He does not have any student debt.

-**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? He has not received any financial aid nor grants before where he has not pursued education beyond high school. He claims that he does not "understand that stuff" but if he goes to classes for an SRNA/CNA license, he would like to have help in applying for it and understanding it for the future.

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

Favorite job

Job title:	Caregiver
Employer:	His Grandparents
Job duties:	Scheduling medical appointments and transporting grandparents to places to meet their needs, providing direct support and care for older people based on specific dietary needs, physical health restrictions, and mobility, and daily routine assistance. Plan and prepare meals and maintain a safe and sanitary environment. Assist with community activities.
Start Date: December 2016	End Date: May 2023
How many hours per week:	40 + hours a week
How did you find this job?	He became the caregiver for his grandparents when their health was declining.
What did you like about the job?	He enjoyed seeing smiles on their faces and helping them with their daily needs so that they wouldn't be alone. He enjoyed being there with them and bringing joy when they were having a hard time or when their health was not at its best.
What did you dislike?	He disliked that, even in family situations, he felt like he didn't get a break from it. He was constantly there, providing support, and lived with them, so every day was busy, and he didn't get much time for himself.
What was your supervisor like? Your co-workers?	N/A. He did not have co-workers or a supervisor, as he was taking care of his family. He did say that he got along well with home health nurses and hospice care when they were

	involved in the later stages of his caregiving. He said they were very helpful in understanding the health needs, and when there was something, he did not know how to do.
Reason for leaving job?	His grandparents passed away, and he was the caregiver.
Who supported you, or what supports did you have for this job:	He did not have any supports for this job where it was taking care of family. He had a therapist at the time who he said was encouraging, but he did not get to meet with him very often due to needing to be at home all the time.

Second favorite job ☐ N/A

Job title:	Janitor
Employer:	City Wide Janitorial Inc
Job duties:	Maintain and upkeep office spaces according to set standards and safety requirements, utilize janitorial equipment such as vacuums, floor scrubbers, mops, cleaning solutions, and brooms to sanitize and clean commercial spaces and businesses promptly, dusted, swept, wiped down surfaces, and organized rooms to prepare for daily activities and provide welcoming environment for customers, and collaborated with a small cleaning crew to complete custodial tasks.
Start Date: October 2010	End Date: May 2011
How many hours per week:	35-40 hours
How did you find this job?	He found out about this job from his friend, Matthew, whose Dad owned the company.
What did you like about job?	He enjoyed interacting with the same people every day on the job and was able to balance working independently within a group. He also appreciated that the job was consistent, and he knew exactly what he had to do every day when he arrived.
What did you dislike?	He disliked the lack of growth opportunities and the limited avenues for advancement, as well as the relatively low pay. He felt that he was not being paid enough for his work.
What was your supervisor like? Your co-workers?	He said his co-workers and supervisor were all great. Everyone worked together and all completed their tasks. He appreciated that his friend worked with him, and he knew someone there before he started.
Reason for leaving job?	He decided he wanted to join the military and was accepted into training for the Navy.
Who supported you, or what support did you have for this job:	His friend, Matthew, supported him on the job when he needed it, as did his girlfriend, Julie. He said if he needed something, he would also ask his coworkers and supervisor, and they would help out too. He felt very comfortable here and supported.

Least favorite job ☐ N/A

Job title:	Cook
Employer:	McDonalds
Job duties:	Prepare menu items for customers in the drive-thru and in-store at a fast pace, stock inventory and food items according to proper food safety methods and temperatures, sanitize and clean the workstation and grill, repair and replace kitchen equipment to ensure proper working order and function, and cut and slice meat and vegetables.
Start Date: October 2010	End Date: March 2008
How many hours per week:	40 hours a week
How did you find this job?	He went in to ask for an application since it was close to where he lived.
What did you like about job?	He appreciated the opportunity to learn something new and earn money to help with his bills.
What did you dislike?	He did not like the fast-paced nature of it, the speed required to complete tasks, and the smell of grease.
What was your supervisor like? Your co-workers?	He said his co-workers were not very friendly, and the supervisor was very strict. He felt like they all put a lot of pressure on him and were “mean”. He stated that his coworkers would often pull pranks on each other, which were sometimes hurtful to him and other coworkers.
Reason for leaving job?	He did not enjoy being a cook and disliked his coworkers. He said the environment was too stressful. The stress came from having to deal with coworkers and the fast-paced environment of the fast-food industry. It was just too much for him to handle.
Who supported you, or what support did you have for this job:	He did not have anyone to support him on this job.

Another job you did not like ☐ N/A

Job title:	Maintenance Technician/Janitor
Employer:	Wendy's
Job duties:	Clean and sanitize restrooms, floors, drink stations, counters, lobby area, and machines. Replenish custodial equipment in the stockroom and organize cleaning materials by date and proper order. Clean out the grease trap using appropriate measures to prevent hazards and ensure that all necessary precautions are taken. Attend to urgent cleaning needs, such as cleaning up after spills or trash leaks.
Start Date: August 2009	End Date: July 2010
How many hours per week:	25-35 hours a week
How did you find this job?	He found out about this job by visiting in person and filling out an application, as it was also conveniently located near his house.
What did you like about job?	He appreciated having the ability to work independently and not frequently interact with customers or coworkers. He liked that he did not have to work at a super-fast pace and could accomplish his tasks without high pressure, unlike at McDonald's.
What did you dislike?	He disliked the fast-food environment and some of his coworkers. He also did not like that he wasn't getting as many hours as promised.
What was your supervisor like? Your co-workers?	He said his supervisor was inconsistent and would sometimes be nice and other times rude. He liked some of his coworkers and others with whom he did not get along. He felt like they had "cliques" and he didn't want to deal with "drama".
Reason for leaving job?	He was not earning enough hours or money to pay his bills. He also said he was tired of being in a fast food setting.
Who supported you, or what supports did you have for this job:	His supervisor would sometimes provide support for him and his grandparents, with whom he kept in regular contact.

Military Experience ☐ N/A

Branch:	Navy
Dates:	May 2012-December 2016
Training or work experience:	Medical assistant training and basic Corpsman training. Mark stated that the training he received was geared toward work "in the field". He said that he worked in what he would consider to be war zones to provide triage care to soldiers. However, he did spend time on military vessels and bases, providing what he called "ordinary" medical services, such as vaccinations and basic medical care, to assist physicians.
Certificate or license:	CPR/BLS (Basic Life Support) Certificate. He would need to renew both, as they have just recently expired.

Do you have your DD214 (Discharge from Active Duty)? Yes

Do you have any concerns regarding employment due to your military service? Is there additional information to share? He does not have any concerns regarding employment from his military service. He says that it would be helpful if he decides to go into caregiving or in the medical field but does recognize some of it could be triggering due to the things he has witnessed while overseas and serving.

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: Mark shares that growing up with his grandparents, they went to church on Sundays and would celebrate the "typical" Thanksgiving and Christmas festivities with Food and card games. Mark expressed his gratitude towards his grandparents for spending time as a family and making time for friends. Mark shared that an ideal job would have time off for the holidays to spend with his friends, but it isn't required, as working through the holidays this year may be easier for him, as he is still struggling with the loss of his grandparents. Mark is also a veteran, having served in the Navy. He stated that one day, when he gets a car and driver's license, he wants to get a Veteran's license plate. He is proud of his service and has shared with me multiple times that his time in the military

helped define him today. He states that he "grew up" in the military, learned how to take direction, work as part of a team, and appreciate life and his family.

How do you identify yourself (*race, ethnicity, gender, color, economic status*)? Mark stated that he identifies himself as a white, male. As for his economic status he feels that it has been difficult feeling secure financially in his adult life due to not having consistent work. When he moved to Chicago, IL he had hoped to pursue some form of Education or Training to find something that he loved and could commit to long-term. However, when his grandparent's health conditions grew worse and received a call from the Home Aid, he knew he had to move from Chicago to Louisville to help. Growing up with his grandparents they were financially stable, and his grandparents had their own home. Mark shared that growing up there was plenty of food due to his grandmother's garden. Mark shared that once he gets a secure job that he hopes he can find an apartment that has space for a small, raised garden as he feels that there is nothing better than fresh fruits and vegetables.

What is important to you in terms of your background and culture? (*i.e., race, ethnicity, color, gender, economic status, etc.*) Mark shared that gaining his sense of independence and being able to take care of himself without the use of government assistance is very important to him. He also shared that with "getting his act together" that he would be able to take a woman out on dates as he can't afford that right now.

Are there any cultural norms that would assist you in feeling comfortable at work/school? Mark shared that he enjoys interacting with others and getting to know people; therefore, the social component of a job would be an important factor. However, in some of Mark's previous jobs, he has had issues socially with co-workers. Mark believes it was because of the jobs. In one instance, at the fast-food job he just couldn't relate to the co-workers not doing their job and just wanting to "goof off" all the time. It is important to Mark to have co-workers who take their job seriously and he feels like moving toward caregiving, so that he will find that balance.

Which languages do you speak? Which language do you prefer? Mark's primary language is only English.

What special events or holidays do you celebrate? Are there family traditions or holidays that would affect work? Mark shared that he celebrates Thanksgiving and Christmas. With the recent change in family dynamics, Mark's goal is to celebrate these holidays with friends in Louisville. Alternatively, if he can save enough money, he plans to take a weekend trip to Chicago to celebrate Christmas with his friends.

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.) Mark shared that he doesn't have family members now to meet with but as for his friends he shared that, "You have met my buddy, John. He is there for me more than anyone right now." Mark shared that as for his friends or anyone that comes over to his home that they must take their shoes off and wash their hands before going to the living room as this is something that his grandmother was very adamant about, "and now just feels it is the right thing to do, I mean it's still her home." Mark expressed the importance of a clean and organized space. After "hanging out" with friends, Mark and John tidy up the living room to make sure everything is put back into place. Mark stated that it makes his anxiety better knowing that everything has a place. Mark shared that his friend, Chris in Chicago talk on a weekly basis and will facetime while they smoke.

Have you ever felt discriminated against regarding a job or at school? Could you tell me about that? Mark stated that he never felt discriminated against with work. He feels that he just hasn't found the right job for him.

Health

Please tell me about your mental health (*Medications/Side effects/Diagnosis/Current treatment, if any*). Mark shared that he has been diagnosed with Bipolar disorder with psychosis features. His symptoms include depression, feeling restless, not feeling tired at all, phobias and disassociation. Mark shared that he is taking medications such as Lithium and Seroquel. Mark also shared, that his friendships and "talking times" with Keith, really help him with his goal planning, such as this step to obtain work and maybe look at education in the future.

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?*) Mark shared that each time he wakes up, he takes notes on a notepad to track his moods and the number of hours he slept, which he then shares with his therapist. Mark also shared that he walks a lot as a way to get where he needs to go and connect to his thoughts. When he finds himself in a bad place or experiences early signs of an episode, he likes to utilize the Spotify playlist he put together to help him reconnect with reality. Mark shared that his therapist and his friend, Chris, are great supports to talk to him through an episode. Of course, his good friend John is always a good person to contact as well. If he has symptoms on the job, it would be ideal for the employer to allow him to use his headphones.

How does your physical health impact you? (*Doctor Note/restrictions, accommodations needed, lifting, bending, standing, sitting, climbing, reaching, etc*.) Mark stated that he has no concerns with his physical health and doesn't need any accommodations.

Some employers use drug screens while hiring. Is this a concern for you? Mark shared that he does smoke Marijuana regularly, as he feels it helps him with his Bipolar disorder. Mark discussed that he knew that a drug screen might be necessary for work and that he was willing to work on

this to obtain work. I suggested he talk more with his therapist about this moving forward.

What would help you manage your MH/substance use so that you can be productive and safe at work or school? ☒ No concern Mark shared that he would smoke marijuana, "after work in the evenings."

Do you have trouble remembering appointments? How do you overcome this, or how can I help? Mark shared that he doesn't have trouble remembering his appointments as he puts them into his phone calendar with reminders and checks the night before, so he knows when he needs to start his walking route to get to appointments on time.

Do you have any concerns with concentration, and if so, how might this affect your employment? Mark stated that the only concern he has is if he is having an episode and is dissociating. As his boss or coworkers may be trying to communicate with him and he isn't responsive and may need support with grounding.

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?)*** Mark stated that he enjoys the balance of working independently and with others. He appreciates knowing what is expected of him and this clarity helps him to stay focused. He enjoys the social component of a job, so having an environment where he can work closely with others and being able to build connections with coworkers would be ideal. Mark would enjoy learning from a supervisor who provides a stable and respectful environment. For Mark, having clear communication, support and a calm atmosphere would help him feel confident in his interactions with his coworkers. Having an environment that minimizes conflict and does not have" cliques", Mark would thrive both socially and professionally.

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. Mark feels comfortable and personable when communicating with others. He interacts well with people, and those around him, including his therapist Keith, have described him as friendly, caring, dependable, and considerate. Mark has experienced dissociating while working and feels he will need to be upfront with his supervisor about his needs to have time to gather his thoughts or other appropriate accommodations to be made. Mark has some difficulty retaining and processing new information, particularly when it comes to computers or reading independently. If he were to face communication challenges with supervisors or coworkers, it might be related to information overload or difficulty remembering new processes, particularly

if they require technological skills that are unfamiliar to him. Mark also admits that he does need to communicate with supervisors more at work if problems arise. In the past, he has just quit. Again, he does state that he was never fully happy with some of his past jobs and didn't want to put the time in to make it work.

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? Mark's primary family supporters were his grandparents, who recently passed away. He does not have contact with his birth parents. His main social support now comes from his friend John, who has been there for him more than anyone. Mark also maintains a connection with his friend Chris in Chicago, whom he talks to weekly. If Mark were offered a job tomorrow, he would likely call John first to share the news and seek his input or emotional support. Mark may feel that John would be the most supportive, as he has been a consistent presence in his life, especially following his grandparents' passing.

Describe your current living situation and any goals you may have for the future living situation. (*Alone, with family, supported housing?*) Mark currently lives in his grandparents' apartment in downtown Louisville, KY, but he will need to find a new place within the next two months since his grandparents have passed. Mark expressed that he values an organized and clean space, which is something his grandmother emphasized in their home. He wants to continue living in a structured environment, potentially on his own, as he appreciates the peace that comes from knowing everything has a place. Mark's future goal is to obtain housing where he can entertain his friends and have a sense of independence. He has been referred to Case Management to receive assistance.

Benefits ☐ N/A

Do you receive any of the following benefits?

☒ SSI ☐ SSDI ☐ Housing Subsidy ☒ Food Stamps ☐ K-TAP
☐ W-Comp
☐ Retirement from the previous job ☐ VA benefits (combat-related? ☐ Yes)

☐ Spouse or dependent child receives benefits. ☐ UI (Unemployment Insurance)
☒ Medicaid ☐ Medicare ☐ Other benefits: N/A
☐ Unsure which benefits s/he receives ☐ Michelle P, SCL, or other waivers.
☐ No benefits

Mark currently receives Food Stamps and participates in Medicaid Insurance Coverage.

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? ☐ N/A

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

Mark is not receiving SSI/SSDI benefits and does not require a referral to a benefits planner.

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.)*
N/A

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.
Mark receives Food Stamps and Medicaid insurance. I provided Mark with the necessary phone numbers to contact the food stamp office and The Department of Medicaid services to see how work would impact these benefits. Mark stated he felt comfortable completing this task independently. A referral for Case Management has been submitted to assist him with his housing needs. Once assigned, Mark agreed for me to meet with him and his case manager to discuss his needs and how working could affect his current benefits.

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? Having a specialist advocate for me with employers and communicating with managers, Mark feels it will be a great asset in the job search. He shared he is not always confident at first with approaching people he does not know. He feels the specialist can share his skills and experience in a marketable way. He is not opposed to visiting employers with the specialist, as long as the specialist is taking the lead on the conversation with hiring managers.

What could be some of the disadvantages? If the specialist is involved with hiring managers, it could be interpreted to the managers or other employees that I am not capable of independently finding a job on my own, and that I am involved with a local mental health center. Mark also does not an employer to know anything about his diagnosis, he feels he can do the caregiver role and would not need any accommodations.

What can I share with an employer as your advocate? Be specific (*Some examples include hospitalization, medications, diagnosis, and accommodations)*
Mark feels comfortable allowing the specialist to share information about his previous work history, skills, and supports he may need. Examples of those include: Mark states that he learns best by doing hands-on activities or working directly with the material. He wants to be able to try things out once he is trained, or have someone show him exactly what he needs to do and how to do it. He wants the employer to be aware of his learning style to help aid when training when he starts a job. One of his coping strategies includes using headphones while working if needed. Once the job is offered, he would like his specialist to discuss this with the employer. If an episode of dissociation arises, he may need natural support on the job to help him with grounding. Mark would like me to describe him to employers as follows: Mark is a social, personable, and prompt individual who has experience and skills in fast food, janitorial, and caregiving for older adults*. He is organized and consistently punctual in all our professional interactions. He is willing to work 1st or 2nd shift with part-time hours. He will walk or utilize public transportation.*

What can I not share with an employer as your advocate? Be Specific. (*Some examples include hospitalization, medications, diagnosis, and accommodations)* Mark does not want me to share any information about his social use of marijuana or therapy appointments. If he needs time off

for a therapy appointment, he would like it to be referred to as a "medical appointment."

If you decided that the specialist should <u>not</u> 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…*)? Does use substances socially, the specialist will be mindful of those business who require drug testing.

Do you have any restrictions regarding where you can work or go to school? No

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

If yes, please explain: Public Intoxication – Marijuana / Alcohol and Marijuana Possession. I was fined and did some minimal jail time in 2024. I was out with a group of friends; we were leaving a friend's house and walking to another during our local towns festival and were approached by the police.

If you have a probation officer, would it be helpful to let them know you are looking for work with our program?

Would you like help learning what is on your legal record and obtaining a copy of your record from the OVR? Yes, Mark would like to be sure exactly what will show up.

Transportation Plan

What is your current plan to get to and from work? For Mark, Public Transpiration has been unreliable. He would prefer a job within walking distance of his home. This will relieve anxiety on his part as he will have control of how he gets to and from work.

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? Mark would utilize public transportation if necessary. He also has the option of Uber, Lyft and taxi.

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? If Mark can walk to work, he is confident that he can get to work on time. He has been late in the past when relying on bus service. By walking to work, Mark has control over his time. The walk itself gives him time to prepare and process his day.

How far are you willing to travel for work? (*20+ miles from home, only travel within your county*) ½ mile from home would be ideal, but he is willing to go as far as 1 mile.

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.

I have talked with his therapist and Mark has a good handle on how his illness affects him. If he becomes symptomatic, he will put on headphones to keep voices at bay. He will also call his therapist or his friends Chris or John to assist him through this period. Both Chris and John have regular conversations with Mark, both verbally and via text. These friendships help Mark from day to day to stay connected to his friends and help keep him grounded. I believe this report also fully outlines the support system that Mark has in place. As his employment specialist, I will also work with Mark once he obtains work, to expand upon his support system, by helping to identify natural supports in the workplace.

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.

We visited several nursing homes and senior centers, including the one previously discussed in the report, Atria Senior Living. At this time, Mark would like to concentrate on businesses within a mile (preferably half a mile) of the apartment complex he hopes to move to. Mark is situated in a desirable part of town, with numerous businesses, and several senior care centers are within a one-mile radius.

Mark, as well as Mark and I have walked from the apartment complex to several businesses in the area, to include, Poor Richards Books, Fine Brothers, Alexander Shoe Store, Lott Furniture, Authur's Men's Store, Arabian Theater, Riser's Cleaners and Laundry, Care Centers, and the Pinehurst Hotel, to determine, which ones would be compatible with his interests. During this time, we discussed the different jobs (stocking, store clerk/retail associate, cashier, inventory clerk, janitor, maintenance, off-loading trucks, front desk clerk, housekeeping, hotel restaurant host, bellman and his favorite, caregiver.) in each business that would coincide with Mark's

interest in caregiving and helping people. Mark is interested in working directly with people and would prefer not to be a cashier. Jobs in the customer service and caregiving parts of the businesses interested him the most. He enjoys the positions of caregiving and customer service, where he can assist people with their needs. Several stores had an older clientele, which aligns with his interests. Mark enjoys helping people, and the jobs mentioned above would enable him to provide that assistance. Ultimately, after all of our investigation and exploration, we decided that the Atria Senior Living center was the most desired business and working within the caregiver role to help seniors.

Suggested Employment Goal(s): Caregiver, with an emphasis in customer service

Melinda Thomas Date: 12/18/24

Staff Signature

Mark Wilson Date: 12/18/24

Job seeker/student signature

Job Search Plan

Client Information

Organization: ABC Agency
Employment Specialist: Melinda Thomas
Consumer Name: Mark Wilson
OVR Counselor: Heath Towland

Date: 12/18/24
Phone Number: 123-456-7890
Case Number: 896750

Consumer Goals

Consumer Career Goals, Job Preferences (In Consumer's own words): Mark states, "I want to find a job helping seniors that involves customer service, so being able to help care for older folks and also be able to do other things as well, like take them out into the community." Mark has chosen the career goal of: Caregiver, specifically with a focus on eldercare and customer service.

Consumer Strengths Related to Career Goals: Mark is personable, friendly, caring, considerate, dependable, and interacts well with others. Mark said he is organized and likes everything neat and orderly. Mark also has experience, since he was a caregiver for his grandparents.

Objective #1: Apply for jobs within the caregiving sector that focus on eldercare. A specific focus will be on Atria Senior Living Center. Other possibilities include Horizon Healthcare, Care.com for independent work with the elderly, and Parkview Assisted Living.

Person Responsible: Mark and myself

Frequency: We will aim to further explore a minimum of three businesses a week and apply for all jobs of interest to Mark.

Target Date: Ongoing until work is obtained.

Objective #2: Ensure that Mark understands how employment will impact his other state/federal subsidies (food stamps and Medicaid). Mark prefers to complete this task independently.

Person Responsible: Mark and perhaps myself if Mark decides he needs assistance

Frequency: Within the next month - a few phone calls and perhaps an in-person visit if needed

Target Date: Ongoing until answers and understanding are achieved

Objective #3: Solidify his support system and ensure this is in place before starting work. Identify specific supports needed with those responsible.

Person Responsible: Mark, myself, Chris, John and Keith.

Frequency: Weekly

Target Date: Ongoing to ensure support system is in place during the job search and after employment begins

Objective #4: Develop a functional resume to highlight his experience for this career path, this will be helpful since he has experience but not formal education.

Person Responsible: Mark and myself

Frequency: Weekly

Target Date: January 2025

Employment Specialist Signature / Date: *Melinda Thomas*/ 12/18/24

(by signing this form, the Employment Specialist verifies that the consumer has full knowledge and agrees with this plan.)