

CASE REVIEW INSTRUMENT VOCATIONAL EVALUATION

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| Client Name: | VR Staff: |
| Reviewer: | Date: |

Impairment(s): _____

Referral Date: First Meeting Date: Date Completed:

| QUESTIONS | Y/N/NA | COMMENTS |
|--|--------|----------|
| 1. Is the referral form in casefile with reason for referral documented? | | |
| 2. Were the Assessment services for Vocational Evaluation and Career Planning added? If no, was there a task note explaining why? | | |
| 3. Was the time from referral to client's first scheduled appointment within 15 calendar days? | | |
| 4. Was an interest activity or assessment completed/documented, demonstrating the clients interests and preferences were acknowledged? | | |
| 5. Were assessment activities administered appropriately for the client's situation? Were results documented? | | |
| 6. Were any Progressive Employment activities recommended? | | |
| 7. Were job readiness/planning factors and work characteristics considered and addressed? | | |
| 8. Has the evaluator identified short-term or long-term activities or next-steps in the Summary and Recommendations section upon completion of the evaluation? | | |
| 9. If a job goal(s) was identified is it consistent with the client's impairment and restrictions? | | |
| 10. Was the Vocational Evaluation Report completed within ten calendar days from date evaluation was completed? If no, was there a task note justification? | | |
| 11. Were any assessments scanned and attached to the report as a pdf? | | |

Case Review Instructions-Vocational Evaluation

The Case Review Instrument for Vocational Evaluation should be utilized when reviewing Specialist casework completing vocational evaluation services.

- 1. Was the referral form in the case file and reason for referral clearly specified?**
- 2. Were the Assessment services for Vocational Evaluation, Career Planning, and Community Planning included in the Assessment Services screen?**
 - To ensure this standard was met, the assessment service for career planning and/or vocational evaluation should be selected under Assessment Services under the Assessment Tab in QE2. It should accurately report the current status of the service (i.e. proposed, scheduled, completed, etc.)
 - If not selected, is there a task note justification?
- 3. Was the time from referral to client's first scheduled appointment within 15 calendar days?**
 - The standard is the scheduled date for the client to attend evaluation within 15 calendar days from the date of referral. If the evaluation was started within 15 calendar days the standard is met. Also, if the originally scheduled start date was within 15 calendar days but the client did not keep the scheduled appointment, the standard was met. If the client chose to extend the start date past 15 calendar days indicate N/A. The date of referral for evaluation services should be identified on the Evaluation Referral Form.
- 4. Was an interest activity or assessment completed/documented, demonstrating the Client's interests and preferences were acknowledged?**
 - Client interest shall be the guiding factor for the entire evaluation process. Were other options revealed to the Client or previously identified occupations confirmed?
- 5. Were assessment activities administered appropriately for the client's situation?**
 - Were interests, disability factors, education level, criminal background, etc. considered for the client's unique situation?

6. Were Progressive Employment activities recommended?

- The Reviewer should consider if a REA would have been beneficial and if so, was one completed? It is critical to recognize every client is ready for some degree of work and should be observed in a community setting if at all possible.

7. Were job readiness/planning factors considered and addressed during the assessment?

- Is there evidence the Evaluator/client understood the client's job readiness/planning factors and work characteristics? After reviewing available case file information did the Evaluator address readiness and planning barriers with the client and make appropriate recommendations?

8. Has the Evaluator identified short-term or long-term activities or next steps in the Summary and Recommendation section?

- The Evaluator must identify a next-step action in the Vocational Evaluation Report. The recommendations may be observations regarding what was noted during the evaluation and how it will affect future VR services and placement.

9. If a job goal(s) was identified is it consistent with the client's impairment and restrictions?

- Review Client's restrictions documented in the case file. Ensure these restrictions are consistent with the job goal being recommended. If no job goal is recommended, were additional career activities suggested?

10. Was the Vocational Evaluation Report completed within 10 calendar days from Voc Eval appointment? If no, was there a task note justification?

- The evaluation report is expected to be completed within 10 calendar days from when the client finished evaluation.

11. All test scores and activities will be scanned in and attached as a pdf to the report if there is a print out or score sheet available. Other observations and/or notable information gathered throughout the assessment shall be summarized in the most appropriate section of the report.