



UNITED
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Advancing the independence of people with disabilities

UNITED CEREBRAL PALSY ASSOCIATIONS CHOICE ACCESS PROJECT

PARTICIPANT'S HANDBOOK

February, 1995

for additional information contact:

**UCPA Choice Access Project Office
4101 Gautier-Vancleave Rd. #102
Gautier, MS 39553
(601) 497-6999
FAX (601) 497-6966**

or your local Choice Coordinator



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Council**

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UCPA "CHOICE" DEMONSTRATION GRANT

In 1993 UCPA received a five year "choice" demonstration grant through the Rehabilitation Act of 1992. Choice was one of the primary authorities pushed by UCPA throughout the re-authorization. This exciting opportunity will allow us to demonstrate ways to assist people with physical disabilities into competitive employment through a customer approach that is driven by the individual with disability and completely circumvents the traditional rehabilitation system.

The UCPA demonstration is structured as a three-site national demonstration project. Project activities will be directed by Michael Callahan as Project Director, and will be implemented in the three UCP sites of Detroit, New Orleans and Pittsburgh. The goal is to implement a process for accessing choice for persons with physical disabilities which impact their lives in the functional areas of mobility, manipulation and communication. This targets persons with complex, challenging disabilities who have historically been unserved or under-served through state rehabilitation agencies.

The goal of the project is to facilitate a customer-driven process for choosing and purchasing services and supports which results in meaningful, paid, customer-selected employment for 45 people with significant disabilities each year, or an estimated 225 people over the five year span of the project. Through a customer choice approach to accessing services, each participant will personally design two individualized plans to facilitate their respective goals: A Choice Plan, to clarify individual interest and needs and identify natural supports; and an Employment Plan, based on the employment outcomes they personally desire, which describes the services and supports they view as necessary to achieve their employment goals. A local "Choice Coordinator", and individually selected "Employment Facilitators" will be available in each of the three implementation sites. Project customers (persons with significant disabilities), assisted by their Employment Facilitator, will choose from local individuals and services to assist them in achieving the desired employment goals. Services and supports will be purchased by project customers through use of a choice voucher.

The project has a value-based framework which is based on the precepts of the American With Disabilities Act, and is driven by the UCPA vision for choice which is embraced by all project sites. These beliefs are essential to achieving project goals.

If you have questions about the "Choice Demonstration Grant," contact Michael Callahan at 4101 Gautier-Vancleave Road #102; Gautier, MS 39553; phone (601) 497-6999 or fax (601) 497-6966.

At the core of the UCPA's approach to choice are the following beliefs, which will serve as standard to guide all project activities:

UCPA believes that the American dream rests at the foundation of the values we defend.

UCPA acknowledges that lives of people with disabilities have been limited by decisions made by other people, and by confining expectations, which have ignored, discounted, and underestimated their abilities.

UCPA envisions a system of supports and services which is built on the foundation of the Americans with Disabilities Act; which recognizes competence and choice; which affords individuals with disabilities access to the services and supports they choose and need to live, work, and meaningfully participate in community life; which values people for their gifts; and supports them for their needs.

UCPA believes that people with disabilities should be fully included in all aspects of life and areas of society, so that everyone may experience the benefits of and be enriched by opportunities with each other that move beyond obligation to friendship, and that through such association the continuation of discriminatory and stereotypic attitudes may be prevented.

As a function of the project's commitment to our customer-driven approach, we have developed a "Participants Bill of Rights" which entitles each project customer to:

- be treated as a customer rather than a client

- any information provided in alternative formats to make informed choices about employment goals, providers, vendors, selection of technology assistance, and performance and customer-service standards:

- assistance from a Choice Coordinator,

- the option of developing a Personal Futures Plan for identifying whole-life goals and strategies for achieving those goals;

- assistance from an Employment Facilitator personally selected by the customer;

- a customer-driven individualized Employment Plan, with specific objectives, timelines, and performance measures desired by the customer that focus on outcomes and that result in enhanced productivity, independence, integration, and satisfaction;

- identification of desired career goals and necessary services/supports to achieve those goals, as selected by the customer,

- selection of preferred providers to support the customer in meeting personal employment goals;

- selection if of preferred vendors/providers of technology devices and services;

- the ability to hire and fire all providers/vendors, based on customer satisfaction with performance;

- phone calls of all people involved in project activities returned with in 24 hours;

- employment enrichment credits based on efforts to control costs in achievement of customer-desired employment objectives; and

- approval of voucher service choices made within five working days.



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UCPA CHOICE ACCESS PROJECT
LETTER OF UNDERSTANDING REGARDING
STATE VOCATIONAL REHABILITATION SERVICES
IN PROJECT STATES

United Cerebral Palsy Associations (UCPA) was selected in October of 1993 as one of seven national demonstration sites to provide vouchers to persons with disabilities to be used for purchasing employment outcomes. The Rehabilitation Act of 1992 authorized this demonstration and requires that persons who receive "Choice" services not have a current IWRP from a state vocational rehabilitation agency. Furthermore, UCPA, in its grant application, targeted individuals who had been traditionally denied VR services due to the severity of their disability or who had not received a positive employment outcome from VR.

This demonstration is likely to cause some misunderstanding between the three UCPA project sites (see attached fact sheet for additional information) and the local VR counselors in the project cities. This Letter of Understanding is designed to inform UCPA project personnel, Local Referral Committee members, state and local VR personnel and project participants of the working relationship which should exist between this project and VR in relation to potential participants for the Choice Access project.

The Local Referral Committee in each site should approve for service those unemployed persons who experience a life impact of their disability in the areas of mobility, communication, and manipulation. Persons who have other disabilities, such as mental retardation, in addition to the above issues, may also be selected.

The following persons may be selected for project participation by the Local Referral Committee without reservation:

1. Applicants who have been denied VR services due to the severity of their disability. Often, these persons will have been deemed "non-feasible" for employment under the old VR regulations, prior to the 1992 Re-Authorization of the Rehab Act.
2. Applicants who have been former VR "clients", but who did not receive a positive employment outcome. These applicants will often have been given a VR service code which indicates that employment was not achieved.
3. Applicants who have never applied for VR services, but who meet the above characteristics for impact of disability. This may include students transitioning to adult life, persons new to the area or adults who never used VR services.

The following applicants may be considered for project status by the Local Referral Committee only with approval of the Project Director:

1. Applicants who are currently receiving VR services and who have not had a positive employment outcome. Depending upon the length of time the applicant has been served by VR, and upon other individual considerations, the Project Director will determine participation for each of these applicants.
2. Applicants who were formerly employed on competitive jobs through the services of VR, but who have lost their jobs. These persons should ideally contact VR first for re-employment services.

Choice Coordinators and the Local Referral Committees should not recruit applicants who are in these situations, but the project will accept their applications and their participation will be considered on a case-by-case basis by the project director. Applicants who currently are receiving VR services must inform their VR counselor of their intention to resign their case status by certified letter after they have been selected for project participation and before any funds can be drawn down for services.

The following applicants should not be considered for project status by the Local Referral Committee:

1. Persons who are currently employed, especially on jobs secured through the services of VR.
2. Applicants who are currently applying for VR services and who have not been notified of their eligibility.

Applicants in these situations may submit applications and should be advised to contact the project if their status changes.

It is the policy of the UCPA Choice Access Project to cooperate with local and state VR services throughout the term of this demonstration. The local Choice Coordinator will inform the Local Referral Committee and the project director of potential problems in relation to the above areas of concern. Communication will also be maintained with local VR counselors when working with persons who are common to both services.

It is also the policy of UCPA to honor the choices of individuals with disabilities. This document is designed to increase the ability of the UCPA Choice Access Project to work with local and state VR agencies, and should in no way limit those choices.

Approved by Michael Callahan
July 25, 1994

Table of Contents

L	Project Design	
	Choice Coordinator.....	2
	Local Referral Committee.....	3
	Employment Facilitators.....	4
	Service Providers.....	4
n.	Your Money	
	Your Personal Account.....	6
	Cost of Services.....	6
	Can I Purchase Equipment with My Money?.....	7
	Can I Still Get Money From Vocational Rehabilitation?.....	7
	What Happens if My Money Runs Out?.....	8
	Employment Enhancement Credits.....	9
	Closed Status.....	10
m.	The UCPA Employment Process	
	The Vocational Profile.....	11
	The Profile Meeting.....	12
	Job Development.....	13
	Job/Technology Analysis.....	14
	Employer-Directed Support Plan.....	14
	Employer Handout for Job Facilitation Plan.....	17
	Transportation.....	21
	Personal Assistance Services.....	21
	Therapies.....	21
	Rehabilitation Technology.....	22
	Equipment.....	22
	Other Related Services.....	23
IV.	Project Financial Forms	
	Voucher Contract for Employment Facilitators.....	24
	Voucher Contract for Service Providers.....	27
	Request for Payment Form for Employment Facilitators.....	31
	Request for Payment Form for Service Providers.....	35
V.	Service Product Forms Directory.....	37

UCPA CHOICE PROJECT PARTICIPANT HANDBOOK

Welcome to United Cerebral Palsy Association's Choice Access Project. As a participant of this project you will have access to funding and choices concerning your search for a job which are not typically offered to persons with disabilities. This represents a significant change in the way in which rehabilitation services are offered. You are no longer a "client". Your new status is now that of a "customer" in every sense of the word.

Rather than requesting services from a provider agency or a vocational rehab counselor, you can now shop around among many potential service providers and choose the best one to meet your needs. Our job at UCPA is to help you make informed choices and get the satisfaction and value which all true customers deserve. However, like all programs which involve federal money, there are some "strings" and conditions to the money available to you through this project. This handbook will provide you with information on your rights under the project, an overview of the design, and the conditions which are necessary to utilize the money available to purchase services.

L PROJECT DESIGN

Please read the project overview attached to this handbook. It will provide you an overview of the scope of this national project. UCPA is one of seven agencies nationally which were chosen to conduct this five year national demonstration. Metropolitan areas surrounding the cities of New Orleans, Pittsburgh and Detroit were selected because of the willingness of the local UCP affiliates to cooperate with the national organization, UCPA.

The basic concept of the project is to offer improved choice in employment services by offering vouchers for participants to hire their own service providers. UCPA acts as a fiscal agent for the project in that we maintain an individual account for each participant. The amount of money set aside for you will be described later in the section on **Your Money**.

Choice Coordinator

Each site has a Choice Coordinator, who provides project oversight and information in your local area. The Choice Coordinator for your area is _____. The phone number for your Choice Coordinator is _____. Please feel free to call this person at any time. The Choice Coordinator's job is to insure that each participant gets the kind of employment outcomes that he or she wants. The Coordinator is also responsible for recruiting new applicants, coordinating the Local Referral Committee, assisting participants to develop a Choice Plan (described later in this handbook), approving contracts and requests for payment and collecting data on the project.

Your choice coordinator provides you with a number of direct services as well as general project duties:

1. Taking your application for project services;
2. Describing the project in general terms during the application process;
3. Assisting you to develop a Choice Plan, in which you describe the relationship and importance of work in your life;
4. Informing you of the local list of approved employment facilitators;
5. Assuring that you are satisfied with the services your employment facilitator provides;
6. Approving all voucher contracts and requests for payment regarding your service providers;
7. Collecting data and coordinating project training for providers and facilitators; and,
8. Maintaining contact with the project office regarding all project activities.

Your choice coordinator may or may not be employed by the local UCP affiliate — each site is different. However, regardless of who the choice coordinator is paid by, they work for you and your family. We are committed in this project to insure that each participant feels that they are truly "satisfied customers". Our job is to make that happen for you.

Local Referral Committee

The Local Referral Committee is responsible for deciding who will, and who will not, receive project services. After you submitted your application form, the Choice Coordinator presented it to the Local Referral Committee for consideration. This committee, composed of a person with a physical disability, a family member of a person with a disability, a representative of the local UCP affiliate, a vocational rehabilitation representative and two or three other persons, have the difficult task of deciding who we should serve. Our target group is persons whose disabilities impact their lives in the areas of communication, mobility *and* manipulation.

Each year the Local Referral Committee identifies IS people in each of the three sites. If participants drop out, then new participants are added to bring the number back to 15 persons per year. You are officially a project participant only after the committee has selected you for services and has informed you of this status.

The Local Referral Committee also acts as an arbitrator on disagreements between you and your service providers or your facilitator. If either party feels that there is a problem with a payment or the quality of a service, the Choice Coordinator will initiate a Conflict Resolution Process, described in the Voucher Contract.

Employment Facilitators

We are required by law to assure that you use "informed choice" in your selection of providers and the types of services which you feel that you need to become employed. To help assure that each participant is as fully informed as possible in making their choices, we have implemented the role of the Employment Facilitator to advise participants through the maze of employment services. We strongly recommend that you hire a facilitator to assist you. In fact, we require every participant to identify someone to act as a facilitator, even if that person is a family member. It is our recommendation that you hire a person from our list of facilitators. However, you are free to hire others, as long as that person is willing to attend a staff training provided free of charge by the project, to fill out the necessary forms which we require and to abide by the processes which the project uses.

Anyone may act as an employment facilitator for you, but you may pay only those persons who do not share a household with you, except for paid personal care attendants. This means you may hire a parent, sibling or other relative, as long as they do not live with you. If you wish to receive employment facilitation from someone who lives with you, they must be willing to volunteer their services.

Employment facilitators act as an advisors. And, although they do not provide employment services, they do work directly for you. Some things you might have your facilitator do for you include:

1. Helping you interview potential service providers;
2. Setting up meetings and calling contact people;
3. Helping you decide which providers might best meet your needs;
4. Helping you understand the terms of the contracts, services and payments;
5. Verifying that a provider has done a good job;
6. Assisting you to solve any problems which you may have with a provider; and,
7. Assuring that you are satisfied with your services.

Remember, an employment facilitator is not a service provider. Although they may offer, it is not their job to provide you with transportation, personal assistance services and other personal needs. They can help you find such services and assist you to pay for them, however. If you have any confusion concerning your facilitator, please call your choice coordinator.

Service Providers

Service providers are the individuals, agencies or companies which you hire to provide you with the employment services which you need to become employed. A provider may be anyone, except your employment facilitator. You may pay all service providers, except for family members who share your home. As with employment facilitators, our project has a list of

individuals and agencies which have applied to become service providers and have attended training offered through the project. You may choose among any of these providers. Additionally, you may choose other individuals, agencies or companies as long that they are willing to apply for project provider status, to attend a project training (free of charge) in the area of service they will be providing and to follow the employment process adopted by the UCPA Choice Access Project.

Your employment facilitator will assist you in identifying and interviewing potential service providers. Once you have selected a service provider, you will need to complete a Voucher Contract. This contract, described fully on page 24 of this handbook, is the legal document which UCPA uses as a basis to pay for all you services in this project. You may have more than one Voucher Contract if you choose or need to have multiple providers. Your employment facilitator will assist you in understanding and completing your Voucher Contract(s).

Service providers will only be paid after they have provided the service that you requested, to your complete satisfaction! If you are not satisfied with any service provider, UCPA will not pay the provider, unless they successfully complete the Conflict Resolution Process described in the Voucher Contract. In this case, the provider may receive payment if it is felt by the Local Referral Committee that payment is warranted. In all cases, your satisfaction is our highest priority in resolving payments to providers.

Please be careful not to sign any Request for Payment form from a service provider, unless you are fully satisfied with the completed service. You may cancel a contract at any time with a Service Provider, within five days, by sending a letter to the provider and the Choice Coordinator. It is likely that the Local Referral Committee will authorize at least partial payment for the amount of work performed by the Provider during the time that the contract was valid, unless it is clear that the work performed was not up to the standards set by the project.

The most challenging thing to remember about Service Providers is that they work for you. This is very different from traditional relationships between persons with disabilities and their service agencies. It is possible that Service Providers will either forget this new relationship is in use or they may simply not know how to treat you as their employer. Your employment facilitator can assist you to remind Service Providers of the unique situation. You should also take the initiative to advocate for respect and customer focus from all providers.

II. YOUR MONEY

The money set aside for you in this project is the most innovative aspect of this new way of assisting people with disabilities to become employed. In developing the federal proposal which we submitted to receive funding for this project, we had to estimate the amount of money it takes for an average person with severe physical disabilities to become employed. We also had to include the price of certain equipment and other services such as transportation and personal

assistance services, that might be necessary for employment. We came up with an average of \$10,666 per person. This amount was based on our experiences over the past eight years in UCPA's national employment projects. The following section describes how we suggested to the federal funding agency that the \$10, 666 per person would be spent:

\$1,200	Allocated to the Choice Coordinator's salary for direct services
1,000	For payment of the Employment Facilitator through all phases of service
750	For development of the Vocational Profile
250	For the Profile Meeting
2,000	For Job Development -- finding you the job which you want
250	For a Job/Technology Analysis of your job, before you start work
<u>5,216</u>	For Job Site supports (job coaching), equipment, personal assistance
\$10,666	services and any other legitimate, job related expense

This means that you have direct control over approximately \$9,466. This is federal money which would typically go to vocational rehabilitation state agencies, but under this new project, it goes to meet your individual needs.

Your Personal Account

Once the Local Referral Committee informs the project office of your participant status, we draw down \$9,466 from the federal government in your name. We then set up an account in your name in our computer from which we will pay for the services you need to become employed. Each month we receive Request for Payment forms from providers. If you have approved payment for a certain type of service and if you are satisfied that the outcome is acceptable, we will then pay the provider for the service. You may request from the project office a copy of your account at any time. The Voucher Accountant in the Gautier, Mississippi, project office is Sonia Hester. Her phone number is (601) 497-6999.

Even though service providers should treat you as their employer or customer, you do not have an employee/employer relationship for Federal or State Income Tax purposes. This means that you do not need to worry about withholding FICA or issuing a "1099" sub-contractor form. UCPA handles all that for you. This is the reason we hold your money in our account in Washington, DC. By doing this, we not only can assure that the money is spent appropriately, we keep you from having to report to the IRS on your payments to providers and facilitators.

Cost of Services

The rates to be paid to providers can vary and you are free to negotiate for the most reasonable cost for any unit of service. However, the rates suggested above are a fair average cost of service in the three project cities. If you are successful in negotiating for a less expensive service, place that amount in the appropriate blank on the Voucher Contract Form (see page 27 for example).

No further approval is necessary to proceed. If you and the provider agree on the suggested rates, simply check the blank space and no further approval is needed. If the provider which you have chosen requests an increased rate, and if you are willing to pay that rate, write the rate in the appropriate blank and forward the contract to the Choice Coordinator for approval. Contracts written for more than the suggested rates are not valid until approved by the Choice Coordinator. We will generally approve reasonable charges for more than the suggested costs, but we want to insure that you realize that services of equal quality might be available at a lesser cost from another provider.

Important note: We will not approve any open-ended, hourly rate for any service. The Vocational Profile, Profile Meeting, Job Development and Job Analysis may be paid only with a fixed rate, agreed in advance. The Employer-Directed Job Site support plan is to be re-negotiated monthly, but is paid on an hourly rate. Therapy, rehabilitation technology, personal assistance services and transportation may be paid for hourly, but it is necessary to submit a monthly contract with a firm estimate for service. This protects you from having a provider run up a large number of hours, without your knowledge, and thus depleting your account.

Can I Purchase Equipment with My Money?

Yes, although there are some strings attached. Many persons with severe physical disabilities need power wheelchairs, communication devices, and specialized equipment or job stations. This project can pay for such items, but it is clear that a power wheelchair could use up most of the money which has been allotted for you. Therefore, it is our policy that participants must clearly demonstrate that they have used every other means possible to purchase these "big ticket" items. Your Employment Facilitator and Choice Coordinator can assist you to apply to Medicaid, to develop a PASS plan with Social Security or to present a proposal to a foundation or local charity. If these efforts are unsuccessful, or have already been tried, you may request a major equipment purchase through your Choice Coordinator.

Your personal choice will be supported to the greatest degree possible, but you will have to submit to a bidding process mandated by the UCPA purchasing policies. In the event of a disagreement concerning the purchase of a "big ticket" item (any item costing \$2,000 or more), the Local Referral Committee in your area will be asked to intervene and make recommendations to the Project Director. In the event that a major equipment purchase zeroes out your account, see the next section.

Can I Still Receive Services and Money from Vocational Rehabilitation?

Not as long as you are an active participant of the UCPA Choice Access Project. The federal regulations which govern this demonstration require a complete separation between funds which go to vocational rehabilitation state agencies and those used in this project. Please read the memo in the front of this handbook for more information concerning your status with Voc. Rehab.

What Happens if My Money Runs Out?

It is possible that your money can run out during the course of your participant status for a number of reasons:

1. You may still require supports when all money has been spent;
2. A "big ticket" purchase has depleted your funds before all services were provided;
3. You lost your job and need more money in order to become re-employed.

These are the most common reasons for participants needing additional funds in our projects. We will discuss each situation separately. It is important for you to realize that there is no additional money available to UCPA from the federal government for costs which go beyond our estimate of \$9,466. This means that if we provide you or any other participant with additional funding, that someone in the last year of the project will receive less money, or will not get service at all. This is certainly a concern to all of us at UCPA, as we are sure it is with you. However, we realize that there will be necessary costs which go beyond our average amount and that we will have to recognize that our current participants are more important than potential, future participants. We simply want you to know that all decisions concerning additional money for any participant has direct consequences for other persons with disabilities.

1. In the case in which you feel that you require additional services and your money has run out, you may make a request to the Choice Coordinator that the Local Referral Committee not close your case. With assistance from your Employment Facilitator and your family, if appropriate, you should estimate the amount of funds which will allow you to become "stabilized" on your job. The Choice Coordinator will present that estimate to the Local Referral Committee and the committee will decide on whether to provide the funding and how much will be provided. Members from the committee will probably contact you and they may even ask you to meet with them at a meeting. You are welcome to bring your Employment Facilitator, family members and/or friends to the meeting to assist you in making your case to the Local Referral Committee. The committee's decision will be final in determining additional funding.

2. In the case in which the purchase of a "big ticket" item depletes your account, UCPA will disregard the purchase of the item in relation to your account. In other words, the amount of the purchase will be added to your \$9,466 so that, in essence, there will be no negative impact for the purchase.

3. In the event that you lose your job and need additional funds to become employed, there are two possible scenarios which may be used: a) If you still have money in your account, the remaining money will be used to purchase new employment services. You do not have to have a new Vocational Profile or Profile Meeting if you feel that the original products are still relevant. At the point that your money runs out, you will then implement situation #1, described above. b) If your status has been officially "closed" (see Closed Status, page 8) and you have no more

money in your account, you may ask the Choice Coordinator to re-submit your name to the Local Referral Committee. As a former participant, you will receive consideration above other applicants. If selected for service, an new estimated funding amount will be assigned to you by the committee, which will probably be less than \$9,466.

If you resign your participant status for personal reasons, you may re-apply at any time. However, if you have previously expended project funds, the Local Referral Committee will deduct that amount from your active account amount of \$9,466.

Employment Enhancement Credits

It is possible that some participants will not require the entire amount of funds set aside for them in their effort to become employed. If you feel that this applies to you, UCPA encourages you to consider applying for an Employment Enhancement Credit (EEC). At the point that you feel stabilized on your job, you may ask your Employment Facilitator or Choice Coordinator to report to the Local Referral Committee that your case be "closed" (see the following section, Closed Status, for a complete description). If you still have funds remaining in your account, you may receive access to one-half of the remaining funds in a much more flexible manner than was possible during regular participant status. The funds must still be spent in relation to employment, but your choices are broadened significantly. Some examples of purchases made with your Employment Enhancement Credit might include:

- a. Buying a computer so you can do some of your work at home;
- b. Attending a conference related to your work;
- c. Buying a new suit or dress for work;
- e. Purchasing personal productivity items for your work area; or,
- f. Repairing your van which takes you to work.

All Employment Enhancement Credits must be approved by the Local Referral Committee. UCPA welcomes you to be creative in your proposals to the committee. The maximum amount of an EEC is \$2,500. In order to receive this amount, you would need to have \$5,000 remaining in your account and be stabilized on your job. In no case can an EEC be paid in cash to a participant. Purchases or services to be provided must be accompanied by an invoice. It is permissible to include multiple purchases in your proposal. Employment Enhancement Credits are available only to those participants who are currently employed.

UCPA has instituted the Employment Enhancement Credit in order to gain access to additional funding for those participants who require more than the \$9,466 allotted to each person in the project. By doing this, we might avoid dropping participants in the last year of the project due to lack of funds. It should be noted that Employment Enhancement Credits may not be requested by participants who receive additional funds for project services.

Closed Status

Federal regulations require that our project must determine a point of "closure" for each participant. This means that the participant's account is no longer open and cannot be used to pay for additional services. A participant will be closed under the following conditions:

1. When an employed participant voluntarily requests closure in order to access an Employment Enhancement Credit;
2. When all of the money allotted to an employed participant is spent, including any additional funds approved by the Local Referral Committee;
3. When a participant drops out of the project before becoming employed; or,
4. When an unemployed participant is out of funds and is denied participant status by the Local Referral Committee.

The Local Referral Committee will direct your Choice Coordinator to send you a letter informing you of your closed status. If you feel that you have been closed inappropriately, you may appeal to: (preferably in this order)

- a. The Local Referral Committee;
- b. The Project Director (Michael Callahan, {601} 497-6999); or,
- c. Your state's Client Assistance Program (CAP) which is a part of your state's vocational rehabilitation agency.

m. THE UCPA EMPLOYMENT PROCESS

UCPA has developed an excellent track record in employing persons with severe physical disabilities since 1987. We have learned that virtually everyone is "employable", given sufficient resources and quality supports. It is clear to us however, that money alone is not enough to assist people who have truly significant disabilities to become employed. It also takes effective support strategies. One of the "strings" to the money associated with this project, is that participants and their service providers follow a time-proven process to achieve employment. This process involves five "Core Employment Services":

- a. A person-centered planning process called the **Vocational Profile**;
- b. A meeting which links planning with job development called the **Profile Meeting**;
- c. **Individualized Job Development** which targets the type of job which you want;
- d. A **Job/Technology Analysis** of the employment site and your specific job duties; and,
- e. An **Employer-Directed Support Plan** which provides you with all the support you need to successfully perform your job.

These essential components of the plan are necessary for all participants, unless you can clearly make a case with your Choice Coordinator or the Project Director as to why you feel that a component(s) is not necessary. We realize that this process means that you have less choice and flexibility than if we did not impose it. However, we feel strongly that if a process like this is not followed, that it is extremely unlikely that you will get a good job of your choice. If you have questions concerning this process, please contact your Employment Facilitator or your Choice Coordinator.

The Vocational Profile

The Profile is designed to allow your job developer to get an accurate picture of your skills preferences and needs. Typically, the human service field has tried to accomplish this by asking you to take standardized tests, to perform work samples or to prove your "readiness to work" by other means. UCPA feels that everyone who wishes to work, can work. But it is critically important to get to know you well enough so that a job developer can relate to an employer the unique contributions that you will bring to your job.

You should expect your service provider to spend between 15-25 hours of time getting to know you by asking questions, observing you at home and in the community, talking to family and friends, reading records of programs you have attended and by interviewing human service staff who know you. Your provider should also conduct a thorough inventory of your neighborhood, your section of town, and other areas which you frequently visit. The provider will be noting transportation availability, potential job sites, safety factors and numerous other issues which help to frame your life with your community. We suggest that you pay approximately \$750 for your Vocational Profile.

It is very important for your provider to visit your home in order to understand how you live and to observe any accommodations which you use to help you live successfully. If you are uncomfortable in having your provider in your home, please consider holding a meeting near your home in a public place such as a library, cafe or community center.

When the Vocational Profile is complete, your provider should provide you a copy of the Profile Form. This form is a ten page, or greater, document which describes an array of issues which comprise your life. A sample Vocational Profile is included on page 39 of this handbook. Your profile should be neatly typed, with all words spelled correctly and written in complete sentences. Ask your Employment Facilitator to help you review your profile. Look for the following before you approve a Request for Payment form:

- a. The Profile should be written in positive language, stating what you can do, not focusing on things that you cannot do.
- b. The Profile should be written in language which you, your parents (if appropriate), and your Employment Facilitator can understand.

- c. The Profile should be neatly typed and each item on the form should be addressed fully, unless it is clear to you that an item is not relevant.
- d. If you disagree with a certain item(s) on the profile, tell the provider and request that your perspective be added to the profile. The provider should be willing to re-type the profile with the requested changes.
- e. The bottom line is that you should feel good about both the process of developing the profile and the way in which the profile form describes you. If not, do not approve payment for the profile. Contact your Employment Facilitator and ask for assistance to resolve your concerns.

The Profile Meeting

The Profile Meeting follows the development of the Vocational Profile. This critically important meeting is designed to link who you are with the job finding efforts of the job developer. UCPA requires that the provider who completed your Vocational Profile be hired to manage your Profile Meeting. This meeting takes approximately 2-2 1/2 hours to complete. We suggest that you pay \$250 to your provider for the Profile Meeting. Ideally, the Profile Meeting should be held in your home or nearby, in a library, community center or other public facility. This meeting is about you, not about your provider. Therefore, encourage that the meeting take place in a location which helps providers further understand who you are. The provider's office should be the least preferable place to hold a Profile Meeting.

Your Provider should initiate the Profile Meeting after you have approved payment for the Vocational Profile. Sufficient notice, at least a week, should be given to persons who you wish to attend. It is important to have the right people at your Profile Meeting. Since this meeting is about your employment, you can decide who should attend. However, UCPA does recommend that you consider the following guidelines for asking persons to your meeting:

- a. Ask any family members or relatives who you feel can contribute positively to a meeting concerning your future employment.
- b. Ask close friends or advocates who you feel would offer helpful information and ideas.
- c. The profile meeting service provider, your job developer (if separate from the profile provider), and your Employment Facilitator should be asked to attend.
- d. If you know of any human service staff, former teachers or other persons who are paid to provide you with services, you may ask them to attend.

The number of persons at a profile meeting can range from just a few individuals to as many as 10-12 people. You should invite the number with which you are most comfortable.

The purpose of the Profile Meeting is to direct job development efforts on your behalf. Your job developer will need specific information to take to employers. Additionally, the job developer

needs to know where you might want to work and where to avoid. The Profile Meeting results in a three part form. We have found that this information is perhaps the most critically important aspect of finding good jobs for persons with significant disabilities. The form includes a) Components of an Ideal Job, b) The Types of Jobs in which these components are found, and c) Specific Employers who may have these types of jobs.

Your job developer actually gets a "blueprint" of the kind of work you want to do and a prospecting list of employers who will be contacted. Additionally, your Profile Meeting provider will develop a checklist of your Conditions, Preferences and Contributions from which you can evaluate any job possibility offered by your job developer. A sample Profile Meeting form and checklist is included on page 49 of this handbook.

Job Development

Job Development is the activity in which your service provider contacts targeted employers in your community in a effort to find you a job. In the past there have been a number of approaches which have not proven to be successful in developing jobs for persons with severe physical disabilities. UCPA is committed to changing these ineffective practices and we have implemented an alternative approach in this project. Rather than simply calling on random employers to see if openings exist, this project requires that job developers target employers identified during the Profile Meeting and relate to them your potential contributions.

If an employer has a need for the skills which you can offer, an individualized job description is developed with the employer. This job description is tailored specifically for you and it takes into consideration your preferences, conditions of employment and your unique contributions as well as the reality of the impact of your disability.

Suggested payment for Job Development in this project rewards timely performance. Quality job development is often a time-consuming activity. If a provider is to find you a job in a timely manner, it is critical that need to be the focus of their activity. In order to assure that you receive priority status from your provider, UCPA suggests a payment based on the speed with which you are offered an acceptable job. The rates of pay which we suggest are:

- a. \$2,000 for a job found within 60 days of the Profile Meeting;
- b. \$1,500 for a job found from 61-90 days of the Profile Meeting; and
- c. \$1,000 for a job found from 91-120 days of the Profile Meeting.

If a provider has not found an acceptable job within 120 days of the Profile Meeting, we suggest that you either find new provider or negotiate a fixed rate, which should be less than \$1,000 in most cases. This system is designed to encourage providers to get on with the process of job development. Typically, a good job can be found for you in the 60 day period, if a focused effort is made by a provider. However, it is possible that a good faith and timely effort may not result

in a job for you, even within the 120 day period. If you feel that the provider has made a sincere effort to find you a job, you may enter into another Voucher Contract for the \$2,000 amount (or more, with approval) with the same provider. We recommend that the job developer provide you with documentation which describes the calls made and the problems encountered during the initial contract period.

The most important aspect of this phase of employment is that you should only accept a job which you really want. You are under no obligation to accept a job which does not meet the criteria outlined in the Profile Meeting. In the event that a provider locates a job for you which does meet all the criteria from the meeting, and you do not want the job, the provider may receive partial payment from the Local Referral Committee as a result of the Conflict Resolution Process. **The bottom line is that you should be sure that you want the job which is offered to you.**

A Sample Job Development form is included on page 52 of this handbook.

Job/Technology Analysis

A Job/Technology Analysis is performed after a job has been developed for you, but before you begin work. The provider which you have chosen to assist with Job Facilitation and Support should complete the Job/Technology Analysis. This process should require about 10 hours of the provider's time and we recommend that you pay \$250.

The Job/Technology Analysis provides you and the provider with a clear picture of the company in which you will be working and the duties which you will perform. Additionally, your provider will identify any accessibility, equipment and job station changes which you may need to successfully perform your job. A sample Job/Technology Analysis form is included on page of this handbook.

It is important to receive your analysis before you begin work. Ask your Employment Facilitator to help you understand the terms and conditions described in the analysis. If there seem to be inconsistencies between the analysis and the job description provided to you for Job Development, contact your provider and ask for clarification and correction before you sign the Request for Payment form.

Employer-Directed Support Plan

Since 1986 job coaches have provided employers with the additional support necessary to assist employees with severe disabilities to perform their jobs. In the past several years, job coaching has been criticized based on the reality that long-term job coaches have gotten in the way of the relationship between employers and supported employees. UCPA feels strongly that assistance is often needed by employers and by persons with disabilities. However, we recognize that some changes are necessary to help insure that you will be as fully included in your job setting as

possible. For this reason, we have implemented an Employer-Directed Support Plan to assist both you and your employer with the ideas, supports and training necessary for you to be successful on your job.

The reason that the plan is Employer-Directed is that you work for the employer, not the service provider. While we feel that you will probably need an outside provider to assist you in ways that your employer is not able to do, we want your employer to feel "ownership" of your needs. By asking the employer to direct your support plan, it is more likely that your supervisor and co-workers will be interested in planning with you to meet your job support needs. Your Provider's role is to make this happen. The Provider can also fill in any time your employer is not able to provide you with the assistance which you need.

Before you begin your first day of work, your Provider should introduce the Support Plan to your employer. During your first month of work, we recommend that the Service Provider be available to provide you and the employer with assistance every hour that you are working. For instance, if you will be working four hours per day for five days a week during the first month, the employer would direct your Service Provider to provide you with approximately 80 hours of support (4 hrs./day x 5 days/week x 4 weeks/month = 80 hrs.). We recommend that you pay no more than \$25/hr for this support. For your initial month, your support costs would be \$2,000.

In return you should receive all the training and support you need to begin your job in a successful manner. The Service Provider should encourage your supervisor and co-workers to assist you in the way that all new employees are oriented and trained. You should expect to receive data sheets which describe your performance and learning and a written description of any interactions between your provider and your employer.

Towards the end of the first month, your provider should meet with your employer to develop your next month's support plan. Based on the experiences of your first month, your employer should be able to better estimate your actual support needs. The number of hours to be offered by your provider should go down as your supervisor and co-workers are better able to meet your needs and as you better learn your job. It is very important that you carefully monitor the number of hours of support provided by your Job Facilitator. Two full months of support at \$2,000 per month will use up most of your remaining funds! Here are some ways to carefully conserve your funds during Job Facilitation:

1. Have your Employment Facilitator or parent (or anyone else who you trust) to assist you to explain to your employer that you want your funds to last as long as possible, and ask for help conserving them.
2. Try to negotiate for a cheaper rate from your provider after the first month.
3. Hire a provider who you feel will work with you to conserve your funds.

4. Look for persons in your work area, or even on another shift, who might provide you with assistance on certain tasks at a significantly reduced rate.
5. Ask your Choice Coordinator for ideas and suggestions.

Remember, this is your support money. Take charge of your supports by encouraging your provider to work hard to make it last. We encourage innovation — new ideas and new solutions to job site supports. If you are uncertain whether something will work, call your Choice Coordinator.

It is likely that your support plan will be reduced to five or less hours per week after several months. At that point, it is permissible to develop a multi-month plan for up to three months of supports. When your employer feels that you no longer need outside additional supports you may want to consider an Employment Enhancement Credit to get access to a portion of any remaining money in your account.

A sample Job Facilitation Plan is included on page 67 of this handbook. The following pages include the handout given to employers by your service provider to describe the Job Facilitation Plan.

**UCPA CHOICE ACCESS PROJECT
JOB FACILITATION PLAN
INFORMATION FOR EMPLOYERS AND SERVICE PROVIDERS**

The employee identified on the Job Facilitation Plan form is a participant of United Cerebral Palsy Association's Choice Access Project. This unique federally-funded employment initiative provides vouchers for persons with severe physical disabilities to buy the supports they need to become successfully employed. Vouchering represents a new way of doing business for persons with disabilities, local service providers and employers. Because of this, UCPA has provided this information handout to assist employers and local service providers to better understand the approaches to support adopted by this project and the avenues to receiving payment for services rendered to participants.

Employer Responsibilities

This project has targeted for assistance persons who have disabilities which are expected to affect their work performance in a significant manner. These persons have not traditionally held jobs in the labor market. However, during the past ten years, the human service field has explored innovative and effective ways to assist these persons to meet the needs of employers and to become successfully employed. The name we have given to the approach which has proven the most successful is Supported Employment. Supported Employment provides persons with severe disabilities with representation in securing a job and also provides the new employee and their employer with assistance in training and support — on the job. This combination of representation, training and support has enabled tens of thousands of unemployed persons with disabilities to go to work.

In recent years, we have begun to realize that supported employment services are improved if we begin by assisting the employer to offer all the training and orientation procedures available to any new employee. Therefore, project participants will hire a service provider to offer feedback, suggestions and direct training, if necessary, to your personnel. The service provider is also available to work directly with the supported employee at those times you are not able to provide training or direct supervision. However, we feel that our participants should have access to:

1. The same supports, including orientation and initial job training, offered to all new employees; and,
2. Reasonable accommodations offered to all employees with disabilities to help offset the impact of disability on performance. This can be accomplished by providing additional supervisory supports, access to work, break and toilet areas, modified training procedures and other creative solutions.

It is possible that these conditions may not be sufficient to assist the supported employee to achieve successful performance. For this reason, our project provides our participants with funding to purchase assistance from agencies or individuals who can provide a number of services which can help assure success. These providers have been trained by the project to perform the following services:

1. Monitoring the results of employer assistance to the employee by keeping data on performance and training strategies;
2. Offering feedback and suggestions on problems encountered during orientation and training;
3. Providing direct training and supervision of the employee in situations in which the employer is unable meet those needs; and,
4. Bridging the gap between the employee's work-related and non-work needs.

The Job Facilitation Plan should be directed by the employer with input from the service provider. Details of the plan are provided below:

Service Provider Responsibilities

This project represents a significant change from traditional supported employment. Certainly the most evident difference involves the source of funding for payment of services. Vouchering switches the funding stream from the government>service agency>person with a disability to the government>person with a disability>service agency. In a very real way, you are now working for the supported employee on behalf of the employer. We realize that this change is significant. We also realize that the change presents the human service field with an unprecedented opportunity to improve the quality of employment for persons with disabilities.

This project has a commitment to maximizing the involvement of employers in providing to our participants the same supports typically offered to all employees. We realize, however, that persons with severe physical disabilities will continue to need the additional services offered by service providers. This dual responsibility requires clear communication and understanding between both parties to be successful. The role of the service provider is to:

1. Analyze the needs of the employer and the culture of the work place in order to be in a position to offer support.
2. Assist the employer to plan for the orientation and training to be offered.
3. Offer suggestions and feedback to the personnel the employer assigns to orient and training the supported employee.

4. Provide direct training and supervision to the supported employee in those circumstances in which the employer is not able to assist.
5. Provide an account of the employee's performance using data sheets, daily logs and the VCU service log.
6. Insure that work-related issues and needs are known to the family or residential service provider of the employee.

Job Facilitation Plan Requirements

It is required that the Job Facilitation Plan be re-evaluated and submitted for approval on a monthly basis. Also, the payments associated with the provision of services identified in the plan are to be paid on a monthly basis. The initial month of the plan is designed to provide the basis for estimating the support needs of the employer and employee in the subsequent months of employment. The employer will determine when the assistance of the service provider is no longer needed.

First Month The project will pay for up to 80 hours of support by the service provider at the rate agreed to in the Voucher Contract, without prior approval. In individual circumstances, employers or service providers may request from the Choice Coordinator for additional hours of support for the initial month. This intensive coverage should provide the employer with ample support in orienting and training the employee during this period. It is important to remember that the intensive coverage is not intended to simply provide full time job training by the service provider for the employee.

Subsequent Months At the beginning of each month following the initial month (based on the anniversary date of employment) the service provider and employer will design a job facilitation plan for the coming month. Based on the previous month's experiences, the employer should first estimate the percentage of independent performance (work not requiring direct assistance or supervision) for each week. Next, an estimate should be made targeting the amount of supervision and assistance needed available internally from the company, on the balance of time which requires support. Finally, the employer estimates the amount of time which the service provider will be needed each month to provide feedback and support.

It is recommended that employers should not be overly conservative in their estimation of support from the service provider. At the same time, we urge employers and service providers to be creative in considering new ways to decrease the reliance on outside, human service agencies. A long-term relationship which provides occasional support on critical issues is better than one which exhausts all the participant's support funds in the first few months. A plan form and sample plan is provided for assistance in developing the Job Facilitation Plan.

Job Facilitation Plan
UCPA Choice Access Project

Choice Participant _____

Site _____

Employer _____

Dates _____

Job to be supported _____

☐ Initial Month of Work☐ Not Initial Month

(Use .25, .50, .75 and 1.0 hourly time units)

Daily Work Schedule (Describe work activities sequentially)	Time (Use actual times)	Employer hours (no cost)	Service Provider hours	Other paid support

Total Hours _____

Related Services

There are a number of Related Services which you may purchase through project funds. The following sections briefly describe these services and the conditions for purchasing them. The key idea to keep in mind is that it is necessary that all Related Services must be shown to relate directly to the completion of one of the Core Services described above or to your job.

Transportation This project can assist you to cover transportation costs which you incur during the development of any of the Core Services. It cannot pay for transportation for your Employment Facilitator or Service Provider. Once you get a job, you can pay for transportation assistance for up to one month. During this time, you will need to work with your employer, your Employment Facilitator and your Service Provider to develop a long-term solution to your transportation needs. If after one month, you feel that you need additional time to develop a transportation solution, you may appeal to the Local Referral Committee for a one month extension.

It is important to understand that your funds are not sufficient to meet your on-going transportation needs to your job. Please carefully consider your selection of a job in relation to transportation availability. The rates typically charged by the transportation vendor will be accepted by the project, so take care to negotiate and call around for the best rates. You may not reimburse your Employment Facilitator or your Service Provider for transportation assistance which they might provide you.

Personal Assistance Services You may use project funds to pay for the cost of job-related personal assistance services under some conditions. Your use of these funds operates in exactly the same manner as Transportation funds. That is you may use your money to get personal assistance services started, but they will not provide you with a long-term solution. It is permissible to use project funds to pay for personal assistance beyond the first month of employment, as long as the conditions for support to you are based on an "as-needed" basis and can be paid on a unit of service rather than hourly basis. For instance, it is often possible to pay someone in the company in which you work an additional fee to assist you to use the toilet whenever you need to go. If you can negotiate a reasonable rate for such assistance, it can continue as long as your case is open. Through experience, we discourage open-ended, hourly rate personal assistance on jobs because it will deplete your funds nearly as quickly as Job Facilitation. For more information, contact your Choice Coordinator.

Therapies You may pay for speech therapy, occupational therapy and physical therapy services as long as the therapy relates directly to your job or to the completion of one of the Core Services. This project cannot pay for on-going therapy which is generally related to your disability. The reason for this is once again related to the amount of money which is available through this project. These services often cost \$75 per hour or more and a regular therapy regimen could deplete your account in a few months. Examples of job-related costs which can be

covered:

- a. A seating evaluation by a therapist to determine the best type of office chair for you to use;
- b. A range of motion evaluation by an O.T. to determine if you can safely perform a repetitive movement required by the employer; or,
- c. Speech therapy to assist you to incorporate job site jargon into your communication device.

The project will reimburse the therapist at the typical rate charged to others. However, it is necessary to obtain approval from the Choice Coordinator before completing a Voucher Contract for a therapy.

Rehabilitation Technology Rehab Technology includes any assistance which you may need to adapt, modify or make accessible your work area. These costs are fundable under this project. It is necessary for you to get a letter from your employer stating the need for the service and why it is felt that the employer should not make these changes for you at no cost. If the employer feels that it would place an undue burden on the company to make the accommodation, the project will pay for any reasonable support. The project will not typically pay for the cost of construction, reconstruction and labor. A reasonable compromise to negotiate is for the you to pay for the Rehab Technologist and for the employer to pay for the cost of the changes.

This is a sensitive area which gets into the concerns which many businesses have surrounding the American's with Disabilities Act (ADA). If you feel that you need assistance, call your Choice Coordinator. It is important to get a firm price for the cost of the Rehab Technology services to be provided. Many of the people providing this service charge day rates of \$300 - \$500. For this reason, all Voucher Contracts for Rehab Technology must be approved by the Choice Coordinator.

Equipment As discussed previously in this handbook, you may purchase equipment which relates directly to your job. For this reason, most equipment purchases will not be approved until a job has been developed. Equipment falls into two basic categories: a) Lower cost purchases for items costing less than \$2,000; and, b) Big-ticket purchase for items costing more than \$2,000. As in the case of Rehabilitation Technology, it will be necessary to get a letter from your employer stating why you need the equipment and why the employer feels that you should purchase it. All equipment purchases required advance approval from the Choice Coordinator and Big-ticket items fall under UCPA bidding guidelines. Contact your Choice Coordinator for more information.

If you need equipment at home or for general life issues such as mobility and communication, we will assist you any way we can to get those purchases through alternate means. Sources such as Medicaid, SSI PASS Plans, and local charities will be examined.

Other Related Services If you identify a need or purchase not covered in the above categories, contact your Choice Coordinator. It is likely that if the request is connected directly to your job, your project funds can be used to pay for it.

IV. PROJECT FINANCIAL FORMS

Voucher Contracts

After you complete your application form and receive approval from the Local Referral Committee, you must hire an Employment Facilitator and Service Providers. You hire these services officially when you sign a Voucher Contract with each party. These contract are legal documents which allow UCPA to pay for the services which they describe. The contract is actually between UCPA and your facilitator and providers, on your behalf. There are separate contracts for your facilitator and for each service provider. Carefully read the contract before signing. If you want to request a personalized change to a contract, contact your Choice Coordinator and you will receive assistance.

The blank spaces next to the suggested rates must be filled in. Remember, you may negotiate for less than the suggested rate, if the facilitator or provider is willing to accept it. We suggest that you **do** use one Employment Facilitator throughout the process. It is not necessary to use one provider, however, it is usually better to do so. Do not sign a Voucher Contract from a Service Provider which contains amounts for services you do not wish that provider to offer you. It is advisable to mark through on the contract any services not purchased from a provider. The following pages contain blank Vouchers Contract forms for facilitators and service providers. Please note the forms also contain a "Choice Form" which you need to fill out. It helps us to assure that participants do have choices in this project.

VOUCHER CONTRACT CHOICE ACCESS SERVICES

EMPLOYMENT FACILITATOR

Choice Participant _____ Site _____

Employ. Facilitator _____ Date _____

CONTRACT FOR CHOICE ACCESS PROJECT SERVICES

This is a CONTRACT between United Cerebral Palsy Associations, on behalf of _____, an approved Choice Participant, and _____, an approved Choice Access Employment Facilitator, to assist the participant in obtaining employment of his choice by offering advice and feedback on the following services. The cost to be paid for the service is listed after each unit of service. (Please check the appropriate services and fill in amount to be paid.)

_____ Vocational Profile	\$ _____	(\$200)	Each of these costs represent suggested fees (\$50) for the EF. Additional fees must be approved by the Choice Coordinator.
_____ Profile Meeting	\$ _____	(\$50)	
_____ Job Development	\$ _____	(\$200)	
_____ Job Analysis	\$ _____	(\$50)	
_____ Job Facilitation	\$ _____	(\$500)*	

*To be paid hourly based on \$25/hr. submitted monthly with the Job Facilitation Service Provider Request for Payment

Please note! The prices listed above are suggested rates only and Participants may negotiate for less expensive or agree to pay for more expensive services. However, if the price agreed to exceeds these rates, approval must be obtained by the Choice Coordinator.

Initial services will begin on _____ (enter date).

The person listed above is an approved participant of UCPA's Choice Access Project. It is understood that all services are to be negotiated with the Choice Access participant on a schedule identified by the participant and negotiated with the provider. The Employment Facilitator will assist the participant to obtain the outcomes identified in their Choice Plan and the Vocational Profile. At no time will an Employment Facilitator make a choice for the participant unless given specific authority by the participant.

It is understood that the UCPA Choice Access Project will pay for this service: a) only upon receipt of the product associated with this service, described in attachment 'A', b) upon the participant's written approval of these services, and c) upon completion of this form, including all required signatures. The participant will approve services by signing the Request for Payment Form along with the Evaluation of Services form. If the participant does not approve the payment, the participant or Choice Coordinator will notify the provider within 5 days of receipt of the Request for Payment and documentation for services. In this case the

resolution process will be initiated. Without the approval of the participant, the maximum payment will not exceed 50% of the amount listed above. In no case is the participant listed above responsible for direct payment of services under this contract.

Conflict Resolution Procedures

The following process will be used to resolve conflicts and to determine payment for services, in situations in which services are not delivered to the participant's satisfaction:

1. The participant and employment facilitator will meet to discuss the conflict to clarify problems and to identify efforts to be made to bring services to resolution.
2. The results of this meeting will be presented in writing to the local Choice Coordinator for further negotiations and resolutions. The Choice Access Project Director will be notified of the conflict. If necessary, the Choice Coordinator will schedule a second meeting with the above participants to repeat step one. At this step, if the problems and potential resolution strategies have been clarified and efforts made to bring the conflict to resolution and the participant remains dissatisfied, the Choice Coordinator will refer the situation to the Local Referral Committee
3. The Local Referral Committee will review the above activities and make recommendations to the Project Director for degree of payment or non-payment for this facilitator.
4. The Project Director determines the amount of payment, if any, based on the decision of the Local Referral Committee.

The Employment Facilitator agrees to follow the processes outlined in the UCPA Choice Access Grant Proposal and in the Technical Assistance Trainings to assist the participants to make employment choices. A copy of the grant is available from the Choice Coordinator. If at any time, these processes become a barrier to the outcomes for the participant, the local Choice Coordinator should be notified to discuss alternative plans with the CA Project Director for changes in the process to facilitate the employment of this participant. It is also agreed that the CA participant and the provider may end this contract with a 5 day notice in writing.

The facilitator understands that payment for services is dependent upon the satisfaction of the participant and that it is possible that no payment will be provided if so determined by the decision of the participant, the Local Referral Committee and the Project Director. Additionally a completed Service Provider Application Agreement must be on file in the UCPA Choice Access project director's office.

Choice Access Participant **Date**

Employment Facilitator **Date**

Voucher Accountant **Date**

Choice Coordinator **Date**

CHOICE FORM FOR EMPLOYMENT FACILITATORS

This form is to insure that Project Participants of the UCPA Choice Access Project did, indeed, choose the Employment Facilitator identified in the attached **Voucher Contract**. It is also important to identify the facilitators who were considered and the reasons they were or were not chosen by the participant.

Check the all services to be facilitated by this contract:

Core Services

Vocational Profile _____
 Profile Meeting _____
 Job Development _____
 Job Analysis _____
 Job Facilitation _____

Related Services

Transportation _____
 Equipment _____
 Personal Assistance _____
 Therapy _____
 Other (_____) _____

I feel that I made an informed choice to select the facilitator identified in the attached voucher contract:

_____ Yes, definitely _____ Yes, somewhat _____ No, somewhat _____ No, not at all
 If anything other than yes, definitely, is checked, please list reasons:

What influenced your decision to select this facilitator? (check all that apply and add other reasons as appropriate)

_____ Reputation in Community
 _____ Personal Knowledge/Experience
 _____ Response Time
 _____ Cost of Service
 _____ Recommendation by Others
 _____ Close to where you live
 _____ Experience Employing Persons
 with Physical Disabilities

List Your Own Reasons:

How did meet with this facilitator:

_____ In-Person Interview at Facilitator's agency/home _____ In-Person Interview at your Home
 _____ Telephone Interview _____ Group Interview at Project Office
 _____ Other (please describe) _____

Did you interview/consider other facilitators? _____ yes _____ no

If yes, how many? _____

Why didn't you choose the other facilitators: (check all that apply and add reasons of your own)

_____ Reputation in Community
 _____ Poor Response Time
 _____ Attitude
 _____ Cost of Services
 _____ Lack of Employment Experience

List other reasons:

Choice Participant _____
 Date _____

Choice Coord. _____
 Date _____

VOUCHER CONTRACT CHOICE ACCESS SERVICES

Choice Participant _____ Site _____
Service Provider _____ Date _____

CONTRACT FOR CHOICE ACCESS PROJECT SERVICE PROVIDERS

This is a CONTRACT between United Cerebral Palsy Associations, on behalf of _____, an approved CHOICE ACCESS participant, and _____, an approved CHOICE ACCESS provider to assist the participant in obtaining employment of his choice by providing the following services. The cost to be paid for the service is listed after each unit of service. (Please check the appropriate services and fill in amount to be paid.)

_____ Vocational Profile	\$ _____	(\$750) Each of these amounts represent suggested fees
_____ Profile Meeting	\$ _____	(\$250) for the Service Provider. Additional fees must
_____ Job Development*	\$ _____	(\$2,000) be approved by the Choice Coordinator.
_____ Job Analysis	\$ _____	(\$250)
_____ Job Facilitation**	\$ _____	(\$25/hr) To be paid hourly based on the Job Facilitation
		Plan develop by employer.
_____ Transportation**	\$ _____	
_____ Therapy**	\$ _____	
_____ Rehab. Tech.**	\$ _____	
_____ Equipment **	\$ _____	
_____ Other** (describe)	\$ _____	

Please note! The prices above are suggested rates only and Participants may negotiate for less expensive or agree to pay for more expensive services. However, if the price agreed to exceeds these rates, approval must be obtained by the Choice Coordinator.

Initial services will begin on _____ (enter date).

The person listed above is an approved participant of UCPA's Choice Access Project. It is understood that all services are to be negotiated with the Choice Access participant on a schedule identified by the participant and negotiated with the provider. If the participant chooses to use an employment facilitator, this person is listed below. The Employment Facilitator will assist the participant to obtain the outcomes identified in their Choice Plan and the Vocational Profile. At no time will a service provider make a choice for the participant unless given specific authority by the participant.

It is understood that the UCPA Choice Access Project will pay for this service: a) only upon receipt of the product associated with this service, described in attachment 'A', b) upon the participant's written approval of these services, and c) upon completion of this form, including all required signatures. The participant will

* Job Development payments require a special attachment to this contract – Job Development Services

** These services each require an attachment which describes the total projected costs, hourly rates, duration, and, for Job Facilitation, a copy of the employer-directed Job Facilitation Plan.

approve services by signing the Request for Payment Form along with the Evaluation of Services form. If the participant does not approve the payment, the participant or Choice Coordinator will notify the provider within 5 days of receipt of the Request for Payment and documentation for services. In this case the resolution process will be initiated. Without the approval of the participant, the maximum payment will not exceed 50% of the amount listed above. In no case is the participant listed above responsible for direct payment of services under this contract.

Conflict Resolution Procedures

The following process will be used to resolve conflicts and to determine payment for services, in situations in which services are not delivered to the participant's satisfaction:

1. The provider, participant, and employment facilitator will meet to discuss the conflict to clarify problems and to identify efforts to be made to bring services to resolution.
2. The results of this meeting will be presented in writing to the local Choice Coordinator for further negotiations and resolutions. The Choice Access Project Director will be notified of the conflict. If necessary, the Choice Coordinator will schedule a second meeting with the above participants to repeat step one. At this step, if the problems and potential resolution strategies have been clarified and efforts made to bring the conflict to resolution and the participant remains dissatisfied, the Choice Coordinator will refer the situation to the Local Referral Committee
3. The Local Referral Committee will review the above activities and make recommendations to the Project Director for degree of payment or non-payment for this provider.
4. The Project Director determines the amount of payment, if any, based on the decision of the Local Referral Committee.

The provider agrees to follow the processes outlined in the UCPA Self-Directed Staff Training Curriculum to deliver the employment choices of the participant. A copy of the curriculum is available from the Choice Coordinator. If at any time, these processes become a barrier to the outcomes for the participant, the local Choice Coordinator should be notified to discuss alternative plans with the CA Project Director for changes in the process to facilitate the employment of this participant. It is also agreed that the CA participant and the provider may end this contract with a 5 day notice in writing.

The provider understands that payment for services is dependent upon the satisfaction of the participant and that it is possible that no payment will be provided if so determined by the decision of the participant, the Local Referral Committee and the Project Director. Additionally a completed Service Provider Application Agreement must be on file in the UCPA Choice Access project director's office .

Choice Access Participant Date

Service Provider Date

Voucher Accountant Date

Name of Agency (if appl.) Date

CHOICE FORM FOR SERVICE PROVIDERS

This form is to insure that Project Participants of the UCPA Choice Access Project did, indeed, choose the service provider identified in the attached Voucher Contract. It is also important to identify the providers who were considered and the reasons they were or were not chosen by the participant.

Check the Service(s) to be provided by this contract:

Core Services

Vocational Profile _____
Profile Meeting _____
Job Development _____
Job Analysis _____
Job Facilitation _____

Related Services

Transportation _____
Equipment _____
Personal Assistance _____
Therapy _____
Other (_____) _____

I feel that I made an informed choice to select the provider identified in the attached voucher contract:

____ Yes, definitely ____ Yes, somewhat ____ No, somewhat ____ No, not at all
If anything other than yes, definitely, is checked, please list reasons:

What influenced your decision to select this provider? (check all that apply and add other reasons as appropriate)

____ Reputation in Community
____ Personal Knowledge/Experience
____ Response Time
____ Cost of Service
____ Recommendation by Others
____ Close to where you live
____ Experience Employing Persons
with Physical Disabilities

List Your Own Reasons:

How did meet with this provider:

____ In-Person Interview at Provider's agency ____ In-Person Interview at your Home
____ Telephone Interview ____ Group Interview at Project Office
____ Other (please describe) _____

Did you interview/consider other providers? ____ yes ____ no
If yes, how many? _____

Why didn't you choose the other providers: (check all that apply and add reasons of your own)

____ Reputation in Community
____ Poor Response Time
____ Attitude of Staff
____ Cost of Services
____ Lack of Employment Experience

List other reasons:

Choice Participant _____
Date _____

Employ. Facil. _____
Date _____

Request for Payment Forms

These are the forms which you use to approve payment for all project services. It is extremely important that you do not sign a Request for Payment unless all the forms, products and services have been given to you by your provider. If you need help understand either this form or the services which were provided to you, ask for assistance from your Employment Facilitator or trusted family and friends.

The Request for Payment Forms also include the **Evaluation of Services** form which you must complete before UCPA can pay for any service. Please go over this form carefully, as it provides us with our documentation that you accepted the services provided. If you are not satisfied, mark the item #1 Unsatisfactory on the form. This will initiate a Conflict Resolution Process, which is describe on the following page of each form. If this is confusing or if you need further assistance, please call your Choice Coordinator.

The following pages contain blank copies of the Request for Payment forms. Note that there are separate forms for your Employment Facilitator and the Service Provider(s).

UCPA CHOICE ACCESS PROJECT EMPLOYMENT FACILITATOR REQUEST FOR PAYMENT FORM

Choice Participant _____ Site _____
Employ. Facilitator _____ Date Submitted _____
(Address) _____
(Phone) _____
(Contact) _____
Service Provided _____ Total Requested \$ _____
Service Time Period _____ (beginning date)
_____ (service completion)

This form is an invoice requesting payment for services provided under the UCPA Choice Access Project. In sending this invoice I verify that an approved **Service Provider Application Agreement and Voucher Contract** has been completed between the Choice Participant and me. Additionally, attached to this **Request for Payment** form are: a) The UCPA/VCU Service Log form documenting the activities performed for this service, b) the product required for the particular type of service provided by the Service Provider, c) the signature of the Choice Participant approving the payment, and, d) a copy of the **Evaluation of Services** form filled out and signed by the Choice Participant.

I understand that if the Participant is unwilling to sign this form: a) that payment is contingent upon the Participants's satisfaction or the Local Referral Committee's decision to direct UCPA to pay based upon the results of the Conflict Resolution Process, and b) that I am responsible for initiating the project's Conflict Resolution Process and to attach the completed form to this invoice.

Date _____ SS# _____
Employment Facilitator (Very Important!)

Approved:

Choice Participant Date _____

Choice Coordinator Date _____

Below to be completed by Project Office -- UCPA Choice Access

Date Paid Voucher Accountant

Choice Participant _____ Site _____

Service Provider _____ Date _____

32

**UCPA CHOICE ACCESS PROJECT
CONFLICT RESOLUTION PROCESS**

Choice Participant _____ Site _____

Employment Facil. _____ Date _____

If the participant is not satisfied with the service provided, this form must be completed as the CONFLICT RESOLUTION process, as identified in the Voucher Contract. The following steps are to be initiated and completed by the UCPA Choice Coordinator.:

1. If the participant did not approve the Request for Payment, please give the most crucial reason(s).

2. Has the Facilitator met with the participant and Choice Coordinator to resolve this conflict?
____ yes ____ no

If no, call the Choice Coordinator and ,the participant and initiate meeting.

If yes, give date and resolution recommendations:

3. Has the Facilitator met with the Local Referral Committee?
____ yes ____ no

If no, schedule a meeting between the provider, the participant and the Local Referral Committee.

If yes, give date and resolution recommendations:.

Participant

Choice Coordinator

Employment Facilitator

CHOICE ACCESS Project Director decision:

Project Director

Date

The participant, employment facilitator, Choice Coordinator were notified on _____ (date)
by _____.

UCPA CHOICE ACCESS PROJECT SERVICE PROVIDER REQUEST FOR PAYMENT FORM

Choice Participant _____ Site _____

Provider _____ Date Submitted _____

(Address) _____

(Phone) _____

(Contact) _____

Service Provided _____ Total Requested \$ _____

Service Time Period _____ (beginning date)

_____ (service completion)

This form is an invoice requesting payment for services provided under the UCPA Choice Access Project. In sending this invoice I/we verify that an approved **Service Provider Application Agreement and Voucher Contract** has been completed between the Choice Participant and myself or my agency. Additionally, attached to this **Request for Payment** form are: a) The UCPA/VCU Service Log form documenting the activities performed for this service, b) the product required for the particular unit of service provided, c) the signatures of the Choice Participant and Employment Facilitator approving the payment, and, d) a copy of the **Evaluation of Services** form filled out and signed by the Choice Participant.

I understand if the Participant is unwilling to sign this form, that I am responsible for initiating the project's Conflict Resolution Process and to attach the completed form to this invoice.

Service Provider Signature Date _____

Approved:

Choice Participant Date _____

Choice Coordinator Date _____

Below to be completed by Project Office -- UCPA Choice Access

Date Paid

Voucher Accountant

UCPA CHOICE ACCESS PROJECT

EVALUATION OF SERVICES

Choice Participant _____ Site _____

Service Provider _____ Date _____

(This form is to be completed by the Choice Access Participant prior to submission of the **Request for Payment** form to the Choice Coordinator. The Employment Facilitator must also complete one for each service the participant is provided.)

Please give an overall rating of the services received from this provider according to the scale below:

___ 1) unsatisfactory ___ 2) minimally acceptable* ___ 3) satisfactory* ___ 4) better than*
anticipated

IF A 1 (UNSATISFACTORY) IS MARKED, THE CONFLICT RESOLUTION PROCESS MUST BE FOLLOWED AND THE CONFLICT RESOLUTION FORM MUST BE COMPLETED.

(Please list reasons for unsatisfactory service -- You may reference the numbered items below to simplify this rating.)

Please rate the provider on the following qualities using the above scale:

	1	2	3	4
1. Service provider was respectful and positive in interactions				
2. Services were delivered in a timely manner				
3. Follow-up details were handled				
4. Promises were kept regarding services				
5. The outcome that I expected to receive				
6. My opportunity for choices throughout the relationship				
7. The service provider kept me informed during the completion of this activity				
8. My participation in accomplishing the activity to my satisfaction				

Did the provider follow the process identified in the plan?

___ yes ___ no

If no, please describe how the process was different.

Did the provider obtain the outcome identified in the plan?

___ yes ___ no

If no, describe how the outcome was different.

* Provider will be paid if any of these items are marked.

**UCPA CHOICE ACCESS PROJECT
CONFLICT RESOLUTION PROCESS**

Choice Participant _____ Site _____

Service Provider _____ Date _____

If the participant is not satisfied with the service provided, this form must be completed as the CONFLICT RESOLUTION process, as identified in the Voucher Contract. The following steps are to be initiated and completed by the UCPA Choice Coordinator.:

1. If the participant did not approve the Request for Payment, please give the most crucial reason(s).

2. Has the Provider met with the participant and employment facilitator to resolve this conflict?
____ yes ____ no

If no, call the provider, the participant and the employment facilitator and initiate meeting.
If yes, give date and resolution recommendations:

3. Has the provider met with the Choice Coordinator?
____ yes ____ no

If no, set up meeting between Choice Coordinator, local UCP Executive Director and Service Provider.
If yes, give date and resolution recommendations:

4. Has the provider met with the Local Referral Committee?
____ yes ____ no

If no, schedule a meeting between the provider, the participant and the Local Referral Committee.
If yes, give date and resolution recommendations:.

Participant Choice Coordinator Provider

CHOICE ACCESS Project Director decision:

Project Director Date

The participant, employment facilitator, Choice Coordinator, and the service provider were notified on _____ (date)
by

V. SERVICE PRODUCT FORMS

The following pages contain examples of the products which you should receive from your service provider(s) at the conclusion of each Core Employment Service. If you feel that your provider has not offered you a product of this quality, or if they have left forms out, do not approve a Request for Payment for that item. The following forms have been included in this handbook and every form should be completed by your provider:

Vocational Profile	
Form	Page 39-48
Profile Meeting	
Profile Forms	Page 49-50
Ideal Features Checklist	Page 51
Job Development	
Cover Sheet	Page 52
Job Summary	Page 53
Ideal Features Checklist	Page 54
Employer Contact Sheet	Page 55
Quality Features Checklist	Page 56-57
Job/Technology Analysis	
Form	Page 58-66
Employer-Directed Support Plan	
Job Facilitation Plan (Monthly)	Page 67-68
Job Facilitation Daily Schedule	Page 69

V. SERVICE PRODUCT FORMS

MG&A

Dates of Profile Dec. 15, 1991 - Jan. 10, 1992
Compiled by Michael Callahan

A. VOCATIONAL PROFILE

1. Identification Information

- a. Name: *Andrew Collins*
- b. Date of birth: *June 4, 1971*
- c. Social Security: # *439-01- 0020*
- d. Address & phone number: *13 Pleasant Drive
Amber Grove, New York 11793
(516) 601-1792*
- e. Marital status: *Single*
- f. Current occupation/status: *Andrew is currently a student at the local BOCES school for students with disabilities. He is nearing graduation and he has never had any employment experiences or vocational programming in his school curriculum. His parents want him to have a job before he graduates from high school. They also want him to transfer to a regular high school to complete his schooling.*

2. Residential/Domestic Information

- a. Family (Parent/guardian, spouse, children, siblings):
Andrew lives at home with his mother and father. He has two sisters, both of whom are away at college in other states.
- b. Extended family:
Andrew's natural grandparents are all living. His mother's parents are retired and they live within fifteen miles of Amber Grove. His father's parents live in New York City, sixty miles away. Both of his parents have siblings who live within a short distance of Amber Grove. His father's brother, John, is Andrew's favorite relative. John often takes Andrew to swimming lessons at the YMCA.

- c. Persons living in same home/residence:
- | | | | |
|----|--------------|---------|------------------|
| 1. | Mary Collins | Age: 46 | Relation: Mother |
| 2. | Jim Collins | Age: 46 | Relation: Father |
- d. Residential history:
Andrei/ has lived with his family in his current house for twelve years. Prior to that, they lived in a suburb of New York city.
- e. Family support available:
Both of Andrew's parents are willing to provide whatever initial supports he needs in order to get and hold a job. This support includes calling on potential employers, providing transportation and even paying for a job trainer for a short period of time. Mr. and Mrs. Collins have played an integral part of Andrew's schooling and they regularly advocate for quality services.
- f. Description of typical routines:
- | | |
|--------|---|
| 7:00AM | Wake up with assistance from Mother |
| 7:15AM | Bathe, dress and prepare for school (with partial assistance from mother) |
| 7:45AM | Eat breakfast |
| 8:15AM | Leave for school (Parents transport) |
| 8:30AM | Begin school day at BOCES School (traditional special curriculum) |
| 3:30PM | Return home on special bus |
| 4:00PM | Physical therapy session with in-home therapist |
| 5:00PM | YMCA for swimming (usually with parent/uncle) |
| 6:00PM | Return home and prepare for dinner |
| 6:30PM | Dinner with parents |
| 7:15PM | Homework |
| 8:00PM | Watch television or play video games |
| 9:03PM | Bedtime |
- g. Friends and social group(s):
Andrew is very close to his parents and his sisters. He does not maintain frequent contact with fellow students from his BOCES classes. His parents encourage and assist him to participate in regular community activities but his closest relationships are with family and relatives.
- h. Description of neighborhood:
Andrew lives in an upper middle class neighborhood in Amber Grove, a suburban community on Long Island in New York. The houses in the neighborhood are from ten to fifteen years old. The lot sizes are large and the streets give the impression of being rural. There are no sidewalks and the nearest services are five to ten minutes away by automobile.

- i. Location of neighborhood:
Pleasant Drive is approximately three miles from the commercial center of Amber Grove. The neighborhood is also near to several other small Long Island communities.
- j. Services near home:
The commercial center of Amber Grove has at least one of every essential community service: shopping, library, professional services, governmental offices, schools, parks and recreational sites and even a small mall. It is necessary, however, to drive to this area since sidewalks and public transportation are not available.
- k. Transportation availability:
This is no public transportation in Amber Grove. The school district provides a bus for BOCES students. Andrew's mother does not work and she has a mini-van which has been modified to accommodate Andrew's wheelchair. She is willing to transport Andrew, initially, for any important reason.
- l. General employment near home:
As indicated in Item #j, there are ample types of employment in Amber Grove and in neighboring communities. A detailed inventory of specific employment sites will be compiled before the Profile Meeting.
- m. Specific employers near home:
A detailed inventory will be developed prior to the Profile Meeting. This inventory will be conducted by automobile by following main traffic arteries away from Andrew's home.

3. Educational Information

- a. History and general performance (from school records, interview data, observations):
Andrew has attended segregated special education schools during his entire student life. His parents have recently initiated efforts to have him enrolled in a regular high school near his home. Andrew was diagnosed with cerebral palsy when he was a toddler. His parents sought help from the local school district when he was four or five years old. They enrolled him in a preschool program for kids with disabilities. Andrew remained in the same school when he became school age. His schools records indicate that he was cooperative and pleasant and his IEP's reflected a traditional, deficit-reducing, curriculum. When Andrew reached high school age, he transferred to the local BOCES. Even

though he has consistently made good grades on his report cards, his parents question the effectiveness of his curriculum. Andrew can read 10 - 15 familiar sight words, he can print his name, he can count and identify numbers up to ten and he has mastered a number of non-functional skills listed on his IEP's.

b. Vocational programming/performance:

Andrew has received no structured vocational programming as a part of his school program. He has been required to perform routine chores in school and at home. He cheerfully completes his chores on time and with little prodding.

c. Community functioning programming/performance:

Andrew's school program has not included a community functioning domain up to this time. The extent of community programming involved occasional field trips to points of interest in the local area. His parents, however, have always tried to get Andrew involved in his community. He belongs to the local YMCA, a scout troop and a computer users group. He also is active in a national group called Canine Companions, an organization which promotes the use of dogs to assist persons with physical disabilities.

Andrew has a Canine Companion, named Charger, which provides him with assistance in picking up and carrying items, helping with balance, pulling his wheelchair and numerous other tasks.

d. Recreation/leisure programming/performance:

Andrew regularly swims at the local YMCA, he uses the Amber Grove library and he attends scout meetings. The BOCES encourages participation in Special Olympics and Andrew has competed since he was eight years old. He is sometimes reluctant to attend other handicapped-only recreational events sponsored through his school. His IEP identifies several school related recreational skills mostly involving board games and physical development tasks.

4. Work Experience Information

a. Informal work, performed at home;

Andrew does basic chores in his room. He folds and puts away his clothes after they are washed. He also puts away his electronic games and other recreational items.

b. Formal chores at home;

At this point, Andrew is not required to perform any formal chores at home. His parents have considered including home chores on his next IEP.

- c. Informal jobs performed for others:
Andrew has not performed any work for others except for his uncle John. John will occasionally involve Andrew in helping him with his hobby, woodworking. Andrew has helped clean the shop with a ShopVac as well as helping to assemble certain items.
- d. Sheltered employment:
None
- e. Paid work:
Except for his weekly allowance of \$4.00 per week, Andrew has not performed work for pay.

5. Summary of Present Level of Performance

- a. Domestic skills:
Andrew participates while being dressed. He is able to snap and button if the buttons are not too small. He is able to bathe himself using a grab bar to assist in getting into and out of the tub. He can brush his teeth, comb his hair and he shaves with a battery powered razor. Andrew is not required to make his bed but he is expected to keep his electronic games, tapes and other recreational items picked up and stored properly. He can do this with help from his dog. Charger. Andrew does not prepare meals but he can independently feed himself, except for cutting meat.
- b. Community functioning skills :
With transportation assistance, Andrew is able to access effectively most community environments. He depends a great deal on his dog for tasks which involve reaching and carrying. He accompanies his parents on most of their outings not related to business. Because of his physical disability and the lack of sidewalks in his neighborhood, Andrew does not range too far from home on his own. Most of the shopkeepers in Amber Grove know and speak to Andrew when he is in town.
- c. Recreation/leisure skills:
Andrew enjoys swimming, computer/electronic games, watching videos and TV, and anything to do with cars. He is able to swim without assistance across the pool at the YMCA. He can start and operate his dad's computer to play games and he can operate his VCR and television.
- d. Academic skills (Reading, Math, Time, Money):
Andrew can read 10 - 15 familiar words in his environment. Reading and math test indicate that he currently tests at the 1.5 - 2.0 grade level. He is aware of the

importance of money and he can recognize several smaller bills and all coins. He is not able to count money, however. He knows to wait for change from a clerk. Andrew can recognize the time on his digital watch but he cannot tell time on a clock with hands.

e. Motor/mobility skills:

Andrew has cerebral palsy which affects his mobility and his ability to walk. On certain occasions he uses hand crutches with forearm braces for stability, while at other times he uses a wheelchair for mobility. He walks very slowly yet confidently with crutches. He prefers to use his wheelchair, but he has difficulty efficiently pushing and maneuvering due to physical involvement in his hands and arms. His chair is a state-of-the-art, lightweight model which is easily folded and carried.

f. Sensory skills:

Andrew can see, hear and he has full use of all other sensory areas.

g. Communication skills:

Andrew is able to communicate effectively in complete sentences. His cerebral palsy affects his enunciation and the speed at which he speaks. He is able, however, to communicate in a manner which is understandable to anyone who takes care to listen closely.

h. Social interaction skills:

Andrew is an extremely likable and cooperative young man. He is typically in a good humor and he smiles often. Most of his academic reports cite his pleasant behavior as one of his most outstanding competencies. Andrew is a bit shy around strangers, possibly because of his fear that other might not understand him. Most of his recreation and leisure is performed alone.

i. Physical/health related skills and information :

Andrew enjoys excellent health and he is rarely sick, even with colds. His cerebral palsy affects his ability to move his arms and manipulate small objects, though not in a significant manner. His movements are controlled but slow. He is able to reach out in front of his body and grasp or pick up objects which are light. His finger and hand control is slow and sometimes a bit shaky, but he is accurate when given the chance to work slowly. He complains of getting cold when others are comfortable and he doesn't care much for very cold weather.

j. Vocational skills:

Specific vocational skills have not been determined at this time due to the lack of opportunity. However, his disposition, his enthusiasm, and his willingness to stick to a task will be appreciated by employers.

6. Learning and Performance Characteristics

a. Environmental conditions applicant likes best:

Andrew enjoys working inside in clean conditions. He likes the out-of-doors during warm weather, but he says that he would not want to work outside. He also prefers to work sitting in his wheelchair rather than standing or sitting in a regular chair.

b. Instructional strategies which work best:

Andrew's parents feel that he needs the opportunity to independently perform tasks in order to learn. They cite his ability to use the home computer, VCR, TV, and electronic games as proof. His teachers feel that repetition of small steps of tasks is necessary. Regardless of the task, instruction must establish acquisition before focusing on speed. Andrew doesn't seem to benefit from written information but he responds well to visual cues.

c. Degree of support typically required to learn and participate:

At this point in his life, Andrew needs a structured, planned approach to instruction. A trainer or teacher must be prepared to reassess teaching strategies and to keep data on teaching sessions. Andrew can probably learn many social and non-specific tasks by observing others but complex tasks require a systematic approach.

d. Environments/strategies to be avoided:

Andrew has clearly expressed his desire to work indoors and in a sitting position. Other situations should be avoided. Additionally, strategies which push speed or rapid performance should be delayed until a task is mastered. Artificial reinforcement should not be used until it is clear it is needed. Andrew gets a great deal of personal satisfaction from tasks which he likes.

7. Preferences

a. Type of work the applicant wants to do:

He has expressed interest in "computer work", office work and anything that has to do with cars. He enjoyed working in a department store delivering and preparing stock.

- b. What kind of work has applicant/family always wish could be obtained:
Andrew's parents agree with his choices in that they stress inside work, possibly in an office. They don't feel that food service and janitorial jobs would be appropriate. They seem particularly interested in any kind of employment which would involve computers.
- c. Type of work the parent/guardian feels is appropriate:
Andrew's parents are unsure of this. His mother feels that he has an excellent memory, once he has learned a task. His dad notes Andrew's friendliness and acceptance by others. They feel that these characteristics will be beneficial on the job - regardless of type.
- d. What activities the applicant most enjoys doing:
He enjoys the approval of others, especially adults. He likes to be able to choose his own tasks. He loves most electronic games and automobile related games, magazines, and posters. Auto racing shows are his favorite TV choices.
- e. Observations of the kinds of work applicant likes to do best:
Andrew's parents and teachers agree that his preferences are consistent with their observations. His teachers also indicate that he will work on complex puzzles for as long as they will allow him to do so.
- f. Observations of social situations applicant likes best:
Andrew is most comfortable with people he knows well. He tends to remove himself from groups, especially from groups of persons with disabilities. He likes situation best that involve one or two other persons with whom he has a relationship.

8. Connections

- a. Potential employers in family:
Andrew's dad owns a small designing and construction firm. He works out of his home and he feels that Andrew might do better with others. There are several aunts and uncles in the area. Of these, John, is the most likely candidate for providing a job. John is very close to Andrew and he also owns a dry cleaning shop in a nearby community.
- b. Potential employers among friends:
Andrew's mother, Mary, is active in social and volunteer circles in Amber Grove. She knows the head librarian at the local library, the personnel director at the hospital and numerous other potential employers. Jim, his dad, has many connections in the construction

industry and in the related business. He has said that he would be willing to become activity involved in developing jobs for Andrew.

- c. Potential employment sites in neighborhood:
The nearest potential employment sites are in the commercial center of Amber Grove. This area is not far by car, but it is not any closer to Andrew's home than two or three other small communities in the area.
- d. Business/employer contacts for leads through applicant, family, friends:
Andrew's mother and father are both well connected in their community and they are both willing to make contacts on his behalf. Jim's business contacts may be useful except that many of the jobs in the construction industry are outside. The Collin's indicate that their relatives will also help to make contacts with potential employers.

9. Flexibility/Accommodations Which May Be Required in Workplace

- a. Potential need for accessibility assistance, rehab technology, personal assistant services:
Potential employment sites for Andrew will need to be wheelchair accessible. He will also likely benefit from rehab technology services to make his work station efficient. He needs some help with toileting and eating but he should not require a full time personal care attendant on the job. Possible the greatest accommodation will be for Charger, his Canine Companion, both Andrew and his parents have made it clear that any job site must accept the dog.
- b. Habits, idiosyncrasies, routines:
Andrew doesn't have any unusual behaviors which would require accommodation by an employer, except for the use of his dog.
- c. Physical/health restrictions:
The most critical concern in this area involves the limitations which Andrew experiences in mobility, standing, lifting, stooping, reaching and climbing. A job station would either need to be modified to minimize such actions or a job which does not require these actions would need to be developed. Andrew's tendency to be colder than others in a given setting would also need to be considered.
- d. Behavioral challenges:
Andrew's easy temperament and friendly attitude present few if any behavioral challenges. He will balk at work he perceives to be too difficult or rapid paced. He

also might require motivation to keep working when he gets tired or frustrated.

- e. Degree and type of negotiation required:

Negotiation is likely to be required in several areas: 1) acceptance of the companion dog; 2) the need for rehabilitation technology and 3) the likelihood that Andrew's productivity will be significantly below typical expectations for a long time. Job developers must recognize and answer these potential concerns before calling on employers.

10. Other Important Information

It is significant that Andrew's parents are deeply involved in his educational and, in the near future, his vocational experiences. If they are successful in arranging for regular school placement for Andrew, they also want to revamp his IEP to mandate vocational experiences and to help insure that he will have a job when he graduates.

- a. Primary disability classification of physical impairment:
Cerebral Palsy
- b. Age of onset of primary disability:
Developmental
- c. Documented secondary disability:
Mental retardation
- d. Pattern of physical involvement:
Ouadriplegia
- e. Type of Cerebral Palsy:
Spastic

**UCPA CHOICE ACCESS GRANT
SAMPLE PROFILE MEETING FORM**

Name of Applicant: Andrew Collins

Site: " " "g Tcinnri

Date of Meeting: January 10, 1998

Employment Facilitator: Michael Callahan

Provider: Association for Citizens with Learning Disabilities

	Name	Relationship to Applicant
Persons Attending:		
1.	Mary Collins	Mother
2.	Jim Collins	Father
3.	Mike Callahan	Employment Facilitator
4.	Sara Benson	Provider Representative
5.	John Collins	Uncle
6.	Sheila Washington	VR Counselor

A. Description of Ideal" Employment Situation(s)

(This section describes the characteristics of an ideal job situation based on all the information gathered during the profile activity.)

CONDITIONS: Inside work, comfortable temperature, accessible, low stress, day shift - four hours max to start, repetitive job duties, regular contact with co-workers.

PREFERENCES: Work around cars, work with computers, delivery of items in a large office or other work place, data entry, preparation of stock for sale.

CONTRIBUTIONS: Friendly, pleasant, dependable, enthusiastic, good memory, liked by others, can deliver quality on data entry.

B. Job Development/Prospecting List

(The following are lists to be used for job development purposes. They are used to match the applicant's profile information to types to employment and to potential employment sites. This information must be compiled with input by the applicant, parents/guardians, friends and service agency staff).

TYPES OF JOBS

(This list targets the job categories, duties or job titles which are consistent with the Ideal Employment Situation.)

- | | | |
|----|--------------------------|-----|
| 1. | Stocking/warehousing | 6. |
| 2. | Data entry | 7. |
| 3. | Message/product delivery | 8. |
| 4. | Greeting | 9. |
| 5. | Usher | 10. |

SPECIFIC EMPLOYERS

(This prioritized list targets specific employers in the applicant's local community which are consistent with the Information developed in the **Profile**, in the **Meal Employment Situation** and in the **Types of Jobs** sections.

	Name of Employer	Address/Location	Contact/Referral
I.	Brown Ford		
S.	Sears		
3.	Macy's Dept. Store		
4.	State Univ. of New York/Stony Brook		
5.	Pacer Auto Parts		
6.	SUNY Teaching Hospital at Stony Brook		
7.	Auto Zone		
8.	Progress Toyota		
0.	Local Office of Social Security		
10.	Local Board of Education		
II.	DA Sbcplex Theaters		
12.	Walmart		
13.	K-Mart		
14.	Johnson's Auto Repair		
15.	Long Island General Hospital		

**UCPA CHOICE ACCESS PROJECT
CHARACTERISTICS OF AN IDEAL JOB CHECKLIST**

Choice Participant ANDREW COLLINS Site Long Island
 Profile Provider A. C. C. D. Date July 7, 1992
 Job Developer JANE STREET
 Employer SUNY HOSPITAL AT STONEY BROOK
 Date Job Begins AUGUST 1, 1992

Fill left hand column in during
Profile Meeting

These ratings to be made by
Job Developer>

Available

Not
Available

<p>Conditions: List the working conditions which would be ideal for the Participant.</p> <ol style="list-style-type: none"> 1. <u>INSIDE WORK</u> 2. <u>REGULAR CONTACT WITH CO-WORKERS</u> 3. <u>DAY SHIFT</u> 4. <u>ACCESSIBLE FOR WHEELCHAIR</u> 5. <u>PART TIME</u> 	<div>_____</div> <div>_____</div> <div>_____</div> <div>_____</div> <div>_____</div>	<div>_____</div> <div>_____</div> <div>_____</div> <div>_____</div> <div>_____</div>
<p>Preferences: List the types of work the applicant most wants to do.</p> <ol style="list-style-type: none"> 1. <u>WORK AROUND CARS</u> 2. <u>WORK WITH COMPUTERS</u> 3. <u>DELIVERY OF GOODS</u> 4. <u>DATA ENTRY</u> 5. <u>STOCK PREPARATION</u> 	<div>_____</div> <div>_____</div> <div>_____</div> <div>_____</div> <div>_____</div>	<div>_____</div> <div>_____</div> <div>_____</div> <div>_____</div> <div>_____</div>
<p>Contributions: List the most favorable features of the applicant in relation to contributing to employers.</p> <ol style="list-style-type: none"> 1. <u>GOOD MEMORY</u> 2. <u>LIKED BY OTHERS</u> 3. <u>DEPENDABLE</u> 4. <u>ENTHUSIASTIC</u> 5. _____ 	<div>_____</div> <div>_____</div> <div>_____</div> <div>_____</div> <div>_____</div>	<div>_____</div> <div>_____</div> <div>_____</div> <div>_____</div> <div>_____</div>

UCPA'S CHOICE ACCESS PROJECT

JOB ANALYSIS FORM

PARTICIPANT	<u>ANDREW COLLINS</u>	PROVIDER	<u>ASSN. FOR CITIZEN W/L.D.</u>
COMPANY	<u>SUNY HOSPITAL AT STONEYBROOK</u>	COMP. PH. #	_____
ADDRESS	_____	CONTACT	<u>WALTER FREDERICKS</u>
DATE JOB BEGINS	<u>AUGUST 1, 1992</u>	SITE	<u>LONG ISLAND</u>
JOB TITLE	<u>DELIVERY TECH</u>	IMMED. SUPERVISOR	_____
PROVIDER	<u>MICHAEL CAULAHAN</u>	PROVIDER PHONE #	<u>601-497-6999</u>

CORE WORK TASKS:
(Identified by employer)

- ① DELIVERY OF PRINTOUTS TO DEPTS.
- ② DELIVERY OF HEART PUMPS AND
IV. PUMPS TO PATIENT ROOMS
- _____
- _____

EPISODIC WORK TASKS:
(Identified by employer)

- ① RECEIVING AND CATALOGING OF
SUPPLIES
- ② ON CALL, WHILE AT WORK, FOR
SPECIAL DELIVERIES TO PATIENT
ROOMS

JOB-RELATED TASKS:
(Identified during Job Development)

- ① LUNCH AND ONE BREAK
- ② CLOCK IN-OUT
- ③ SET UP THE BAR CODE SCANNER
- ④ PREPARE DOG'S FOOD AND WATER

IMPORTANT CULTURAL ASPECTS:
(And possible accomodations based on info in Profile)

- WEARING UNIFORM (HOSPITAL BLUE)
- WEARING SECURITY BADGE
- WASH HANDS WITH DISINFECTANT SOAP
OFTEN DURING DAY

JOB DETAILS:

RATE OF PAY: \$5.80 HR

WORK DAYS: MONDAY - FRIDAY

HOLIDAYS/LEAVE TIME: 10 HOLIDAYS 7 SICK DAYS
10 VACATION

WORK HOURS EACH DAY: 4 HRS
10:00 AM - 2:30 PM

ATTACH JOB SUMMARY ON SEPARATE SHEET:

HOURS PER WEEK: 20 HRS

BENEFITS: MEDICAL (NO COST) TERM LIFE
DENTAL " " \$10,000

BREAKS/LUNCH: 15 min BREAK
30 min LUNCH

OVERTIME/WEEKEND: SELDOM REQUIRED

**Job Summary for Andrew Collins
Transport Tech
SUNY Stony Brook Hospital**

Andrew will deliver computer print-outs to as many as 80 departments on all 19 floors of the hospital. He will also deliver I.V. pumps in the late afternoon, as needed. His shift will start at 10:00 AM. He will get a fifteen minute break at 11:15 AM and he will have a 30 minute lunch at 12:30 PM. His shift ends a 2:30 PM.

Andrew will fill his basket on his scooter with print-outs in the transport area in the basement. He will then begin his first delivery run, and return when complete. He will repeat the task until all forms are delivered. Occasionally, he will be pulled off print-out delivery to take I.V. pumps for patients' rooms. His supervisor will inform him when he needs to do this.

His job requires him to locate the print-out bin, divide the print-outs by department, scan each packet with his bar code scanner, place the packets in his scooter's basket, deliver the packets to the appropriate department, get the department's receptionist to sign for their packet and to collect any information from various departments which need to be sent back to the transport department.

When he delivers I.V. pumps, he uses a routing sheet to select the number of pumps and he delivers them the appropriate nurse's station and gets a sign-off from a duty nurse.

**UCPA CHOICE ACCESS PROJECT
CHARACTERISTICS OF AN IDEAL JOB CHECKLIST**

Choice Participant ANDREW COLLINS Site LONG ISLAND
 Profile Provider A.C.L.D. Date JULY 7, 1992
 Job Developer JANE STREET
 Employer SUNY STONEY BROOK HOSPITAL
 Date Job Begins AUGUST 1, 1992

Fill left hand column in during
Profile Meeting

These ratings to be made by
Job Developer

Available

Not
Available

<p>Conditions: List the working conditions which would be ideal for the Participant.</p> <ol style="list-style-type: none"> 1. INSIDE WORK 2. REGULAR CONTACT WITH CO-WORKERS 3. DAY SHIFT 4. ACCESSIBLE FOR WHEELCHAIR 5. PART TIME 	<input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/>	
<p>Preferences: List the types of work the applicant most wants to do.</p> <ol style="list-style-type: none"> 1. WORK AROUND CARS 2. WORK WITH COMPUTERS 3. DELIVERY OF GOODS 4. DATA ENTRY 5. STOCK PREPARATION 	 <input checked="" type="checkbox"/> <input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/>
<p>Contributions: List the most favorable features of the applicant in relation to contributing to employers.</p> <ol style="list-style-type: none"> 1. GOOD MEMORY 2. LIKED BY OTHERS 3. DEPENDABLE 4. ENTHUSIASTIC 5. 	<input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input checked="" type="checkbox"/> 	

UCPA CHOICE ACCESS PROJECT JOB DEVELOPMENT CONTACT SHEET

PARTICIPANT:

JOB DEVELOPER:

SITE:

Name of Business	Nature of Business	Date of first contact	Method of Contact			Person making contact	Date of initial meet.	Job Possibility			Used Referral (Yes/no)	Name of Referral
			In-Person	Phone	Drop-In			Hot Lead	Possibility	No		
1. BROWN FORD	CAR DEALERSHIP	1/16/92			✓	MC	1/27/92		✓		yes	ANDREW'S DAD
2. MACY'S DEPT. STORE	RETAIL	1/22/92		✓		MC	N/A			✓	no	
3. SUNNY Stony Brook	UNIVERSITY	2/5/92	✓			MC	2/14/92	✓			yes	ANDREW'S mom
4. PACER Auto Center	RETAIL Auto Parts	2/6/92	✓			MC	N/A			✓	no	
5. SEARS	RETAIL Dept. Store	2/12/92		✓		MC	2/19		✓		no	
6. SUNNY Hospital	HEALTH CARE	2/13/92	✓			MC	2/19	✓			yes	ANDREW'S DAD
7.												
8.												
9.												
10.												
11.												
12.												
13.												
14.												
15.												

**UCPA CHOICE ACCESS PROJECT
WORK SITE QUALITY FEATURES CHECKLIST**

Choice Participant Andrew Collins Rated By Mike Callahan

Employment Site SUNY Hospital at Stoney Br. Date August 10, 1992

Issues	Above Average	Accept- able	Not Accept.
1. Interactions Available with Others:			
A. Co-Workers	✓		
B. Supervisors	✓		
C. Customers		✓	
D. Public		✓	
2. Wages: (Select one, most representative)			
A. Commensurate	✓		
B. Minimum	N/A		
C. Legal, Sub-minimum	N/A		
D. Contract	N/A		
3. Benefits:			
A. Workman's Compensation	✓		
B. Medical Insurance	✓		
C. Vacation, Sick Days, Holidays	✓		
D. Employee Support Programs	✓		
4. Working Conditions:			
A. Safe	✓		
B. Friendly	✓		
C. Accessible	✓		
D. Comfortable	✓		
5. Terms of Employment:			
A. Year Round	✓		
B. Stable	✓		
C. Growth Industry	✓		
6. Enhancing Features:			
A. Possibility for Raises		✓	
B. Upward Mobility		✓	
C. Status Enhancing	✓		
D. Increasing Responsibilities	✓		
E. Marketable Skill is Gained		✓	

WORK SITE QUALITY FEATURES CHECKLIST

Page 2

Issues		Above Average	Accept- able	Not Accept.
7.	Work Expectations:			
	A. Clearly Defined	✓		
	B. Stable	✓		
	C. Flexible	✓		
	D. Carved to Meet Needs of Employee	✓		
8.	Employee Relations			
	A. Responsiveness of Management	✓		
	B. Employee/Management Relationships		✓	
	C. Employee Protections/Due Process	✓		
9.	Internal Training and Support			
	A. Clearly Defined Training Program		✓	
	B. Supports Offered New Employees	✓		
	C. Accommodations for Employees with Disabilities	✓		
10.	Transportation Availability			
	A. On Bus Line		✓	
	B. Employer Supported Car Pools		✓	
11.	Employer Reputation			
	A. Viewed Favorably by Employees	✓		
	B. Viewed Favorably by Community	✓		
	C. Open to Innovation		✓	
	D. Desirable Place to Work	✓		
12.	Employee Characteristics			
	A. Turnover Rate	✓		
	B. Potential for Support	✓		

Adapted from: Mclouglin, Garner & Callahan. (1987). Getting Employed, Staying Employed. Paul Brookes Publishing.

UCPA'S CHOICE ACCESS PROJECT**JOB ANALYSIS FORM**PARTICIPANT *Andrew Collins*PROVIDER *A.C.L.D.*COMPANY *SUNY, Stony Brook Hospital*

COMP. PH. #

ADDRESS *Stony Brook, Long Island, NY*CONTACT *Walter Fredricks*DATE COMPLETE *July 20, 1994*SITE *Long Island, NY*JOB TITLE *Delivery Tech*EMP. FACIL. *Michael Callahan*PHONE NO. *(601) 497-6999***CORE WORK ROUTINES:**
(Identified by employer)

1. *Delivery of computer printouts to departments*
2. *Delivery of heart pumps and I.V. pumps to patient rooms*

EPISODIC WORK ROUTINES:
(Identified by employer)

1. *Receiving and cataloging of supplies*
2. *On-call, while at work, for special deliveries patient rooms*

JOB-RELATED ROUTINES:
(Identified during Job Analysis)
Profile)

1. *Lunch and one break*
2. *Clock in and out*
3. *Set up Bar-Code scanner*
4. *Prepare Charger's (companion dog) water and food*

IMPORTANT CULTURAL ASPECTS:
(And possible accommodations based on info in

1. *Wearing uniform (Hospital blues)*
2. *Wearing security badge*
3. *Washing hands with disinfectant soap*

JOB SUMMARY:

Andrew will deliver computer print-outs to as many as 80 departments on 19 floors of the hospital. He will work for the Transport Department and his supervisor will be Mary Langdon. He will also deliver heart pumps and I.V. pumps as needed. He will start on the day shift, five days per week, from 9:00 AM until 1:30 PM. He will be paid \$5.70 per hour to start. Andrew will get 1/2 hour for lunch at 12:00 and a 15 minute break at 10:30.

JOB FACILITATOR *Elissa Simpson***MARC GOLD & ASSOCIATES****4101 Gantier-Vancleave Rd. #102
Gautier, MS 39553 (601) 497-6999**

B. THE WAY IN WHICH THE JOB TASKS ARE TYPICALLY PERFORMED:**Method**

The facilitator should observe the manner in which each job is performed by typical employees in the setting. This is accomplished by assuming an unobtrusive observation position and carefully watching the employee(s) perform their duties. The facilitator should strive to make a "mental video tape" to be used later as a standard of correct performance and as a way to assist the supported employee to perform in a natural manner.

	<u>Job observed</u>	<u>Employee Observed</u>	<u>Date & Time</u>
1.	<i>Print-out delivery</i>	<i>Tina Lawton</i>	<i>7/21/92, 9:45 - 11:45 AM</i>
2.	<i>I.V. delivery</i>	<i>Tina Lawton</i>	<i>7/22/92, 1:30 - 3:00 PM</i>
3.	<i>Cataloging supplies</i>	<i>Jim Edwards</i>	<i>7/22/92, 9:30 - 11:30 AM</i>
4.	<i>Special deliveries</i>	<i>Tina Lawton</i>	<i>7/23/92, (throughout full day)</i>
5.			

Content

The employment facilitator should ask if the employer has step-by-step procedures for the job tasks observed above. If so, these procedures should serve as the initial content task analysis for each task. If not, the facilitator should write content steps which would be appropriate for an average employee in the work site. These content steps should be presented to an appropriate decision-maker in the company for approval and refinement. Attach step-by step-procedures to this form.

Specific Requirements Identified by Employer

(Check only critical items; Fully describe the extent of the demand and outline possible adaptations/accommodations it felt to be problematic for targeted employee)

PHYSICAL DEMANDS:

- ☒ **LIFTING** (Max. 10 lbs.)
- ☐ **STANDING**
- ☐ **CONTINUOUS MOVEMENT**
- ☐ **RAPID MOVEMENT**
- ☐ **WALKING**
- ☐ **CLIMBING**
- ☐ **STOOPING**
- ☐ **CRAWLING**

SENSORY/COMMUNICATION DEMANDS:

- ☐ **VISION**
- ☐ **HEARING**
- ☐ **SPEAKING**
- ☒ **JUDGMENT** (Identify correct dept.)

ACADEMIC DEMANDS:

- ☐ **READING**
- ☐ **WRITING**
- ☐ **MATH**

MG&A

GENERAL STRENGTH/ENDURANCE REQUIREMENTS:

This job requires employees to lift at least 10 pounds and to deliver the data forms, equipment and supplies in a timely manner, throughout the shift.

PACE OF WORK:

Employees are required to work steadily, and the pace of work is moderate. There is little 'downtime' as there is always something waiting to be done in the Transport Department. Supervisors expect employees to report if they are out of work.

POTENTIALLY DANGEROUS COMPONENTS OF JOB:

Employees must maintain a high standard of hygiene, especially hand washing. Strict standards and cautions are set for contact with blood and materials which contain blood. Employment in hospitals typically carries with it the possibility of infection by contagious diseases.

CRITICALLY IMPORTANT COMPONENTS OF JOB:

Timely and accurate delivery of data forms to the various departments. Dependable delivery of pumps to patient rooms. Availability, on call, for special deliveries.

ESTABLISHED LEARNING CURVE OR PROBATIONARY PERIOD FOR JOB:

7710 hospital maintains a 90 day probationary period in the Transport Department.

WORK SITE CONSIDERATIONS

SPECIAL CLOTHING, UNIFORMS, SAFETY EQUIPMENT REQUIRED:

Employees in the Transport Department must wear 'hospital blues', provided by the department. Closed toe shoes, such as athletic shoes are required. Hats may not be worn. Security badges must be worn at all times.

TOOLS TO BE USED:

No tool use is required for this job.

EQUIPMENT TO BE OPERATED:

7778 position requires the use of a Lightpen barcode scanner, used for data input of all deliveries. The employee must enter their name, employee #, date and department # each day.

MATERIALS TO BE HANDLED:

Andrew will handle bundles of computer print-outs, approximately 1 1/2' thick. These items are delivered to various departments throughout the hospital. He will also handle heart and I. V. pumps, which weigh approximately 5 lbs. Occasionally, he will handle other lightweight items which can be placed in the basket of his scooter.

SPECIAL TERMS USED AT WORK SITE:

Each department name is a unique term, particular to hospitals. He will need to eventually learn 82 department names. 'Daily Print-outs' - the computer information to be delivered to departments.

DESCRIPTION OF ENVIRONMENTAL CONDITIONS OF WORK SITE:

All the work is performed inside the hospital, which is kept at a constant temperature of 76 degrees. The Transport Department is in the basement of a twin-tower, nineteen floor teaching hospital. There are seven separate banks of elevators. The hospital uses signs, rather than painted lines, for reference and directions. The halls are all approximately 10 ft. wide. The entire hospital is well-lighted. The bum unit requires special clearance for entry by the head nurse of the unit.

II. THE MEANS USED BY THE EMPLOYER TO TRAIN AND SUPPORT NEW EMPLOYEES

A. DESCRIPTION OF THE COMPANY'S ORIENTATION PROCEDURES

Ask to review any written documents which describe typical orientation procedures. Discuss with a supervisor or decision-maker the flow of typical procedures. Ask employees about their experiences. If possible, and if it is felt to be necessary, ask to be taken through an orientation.

The transport department provides new employees with a two day orientation common to all hospital employees. Employees attend classes on hospital personnel policies, benefits, safety procedures, CPR and basic patient care. After completing these classes, new delivery techs are assigned to an experienced employee for one or two days. The new tech accompanies the co-worker on deliveries throughout the hospital and is assisted to compile a "cheat sheet" for finding departments. New employees are introduced to reception staff in the departments by the co-worker. After the orientation period, the new employee is given a verbal quiz by the supervisor to determine if additional support is needed. If so, this is arranged on an individual basis by the supervisor.

B. DESCRIPTION OF THE COMPANY'S PROCEDURES FOR INITIALLY TRAINING AND SUPPORTING NEW EMPLOYEES

Follow the suggestions in IIA, above. Additionally, ask for training from the employer on at least one of the tasks to be performed by the supported employer. Use this training as an opportunity to assess the capacity and flexibility of the employer in reference to the needs of the supported employee.

The transport uses an experienced employee in a mentor-like role for the first few weeks of work. The relationship begins during the orientation and continues on a 'as needed' basis for up to three weeks. The co-worker is responsible for getting their own work done and the new employee asks for assistance, after starting to work independently following orientation. The training basically involves demonstration and verbal explanations. Beginning early in the first day of work, the co-worker begins to encourage the new employee to make the deliveries and offers feedback on performance.

C. DESCRIPTION OF SPECIFIC STRATEGIES USED BY THE EMPLOYER

1. WHO TYPICALLY PROVIDES NEW EMPLOYEES WITH TRAINING?

Experienced employees, assigned by the supervisor.

2. AVAILABILITY OF COMPANY TRAINER ASSIGNED TO EMPLOYEE:

The hospital does not have specialized trainers, however each new employee has a co-worker assigned to them.

3. AVAILABILITY OF CO-WORKERS/SUPERVISORS AS TRAINERS:

The transport department supervisor is available to all employees on an individual basis, to be determined by the supervisor. It is not usual for co-workers to be assigned as on-going trainers, however staff have been observed to offer informal assistance to each other often during the work day.

4. DESCRIPTION OF TRAINING STRATEGIES USED BY EMPLOYER:

The transport department relies primarily on demonstration and verbal explanations to teach new employees their jobs. They also use written 'cheat sheets' as reminders for department locations and route finding.

5. IMPORTANT RULES STRESSED BY EMPLOYER & CO-WORKERS:

The most important rules involve patient interactions and safety and health precautions. These rules are stressed in orientation and their violation can involve dismissal from the hospital.

6. UNWRITTEN RULES UNIQUE TO THE SETTING:

Possibly the most commonly discussed unwritten rule is that employees must be busy at all times during work hours. It seems that historically, workers in the transport department would lounge about between calls for assistance. Recently, however, workers have been directed to seek out work from their supervisor anytime there is a lull. It is critical to appear to be busy at all times.

7. POTENTIAL FOR USE OF ADAPTATIONS, MODIFICATIONS IN WORK SITE:

The most likely adaptation for Andrew is the use of a three wheeled, battery-powered scooter for ambulation. This should present no problem as many patients use such devices in the hospital. The transport dept. supervisor seems willing to consider any adaptations which would allow Andrew to better perform his job.

8. WILLINGNESS OF CO-WORKERS/SUPERVISORS TO PROVIDE SUPPORT AND ASSISTANCE:

Co-workers were willing during Andrew's non-school vocational experience to provide him with assistance and support. The supervisor seems very supportive and willing to assist. In general, employees in the transport dept. help each other whenever needed.

MG&A

D. THE "CULTURE" OF THE WORK SITE

1. EMPLOYER'S CONCERN FOR QUALITY:

Quality is perhaps the most important concern in the transport department. It is crucial that the daily print-outs be delivered to the correct area. Additionally, if a particular pump or other equipment is needed on a patient floor, the delivery must be correct.

2. EMPLOYER'S CONCERN NEED FOR PRODUCTIVITY:

The transport supervisor expects steady, dependable performance rather than blazing speed. She constantly stresses accuracy over speed in her description of the job.

3. FLEXIBILITY/RIGIDITY OBSERVED:

TTG rules of the hospital are quite clear and rigid, especially concerning safety precautions and patient care. However, the transport department seems to offer a good deal of flexibility in the way a job gets done. Each employee brings an individual style to the procedures established by the supervisor.

III. PERSONNEL: MANAGERS, SUPERVISORS, CO-WORKERS

A. SUPERVISORS OF EMPLOYEE

- | | | | |
|----|---------------------|-------|--|
| 1. | <i>Mary Langdon</i> | TITLE | <i>Transport Department Supervisor</i> |
| 2. | <i>Tina Lawton</i> | TITLE | <i>Assistant Supervisor, Transport</i> |

B. CO-WORKERS OF EMPLOYEE

- | | | | |
|----|-----------------------|----------|-----------------------------|
| 1. | <i>Tina Lawton</i> | POSITION | <i>Assistant Supervisor</i> |
| 2. | <i>Jim Edwards</i> | POSITION | <i>Delivery Tech</i> |
| 3. | <i>Gloria Johnson</i> | POSITION | <i>Transport Tech</i> |
| 4. | <i>Juan Alvarez</i> | POSITION | <i>Transport Tech</i> |

C. EMPLOYEE SOCIAL GROUPS AND NON-WORK ACTIVITIES:

The employees of the transport department seem to be a close-knit group and socialize with each other, rather than with other employees. They meet after work on Thursday nights at a local restaurant/bar. They also participate in company-sponsored sports activities. They have a bowling team during the winter and a softball team in the summer.

D. LEADERS AND POTENTIAL ALLIES AMONG CO-WORKERS AND SUPERVISORS:

Tina Lawton, assistant supervisor, is clearly the emotional leader in the department. She bridges the gap between management and direct employees. She has also shown interest during Andrew's non-school vocational experience which preceded this job.

MARC GOLD & ASSOCIATES

**4101 Gautier-Vandœuvre Rd. #108
Gautier, MS 39553 (601) 497-6999**

IV. JOB DESCRIPTION

SCHEDULE:

OF DAYS OF WORK PER WEEK 5

DAYS: Monday - Friday HRS 9:00AM - 1:30PM

_____ HRS _____ - _____

_____ HRS _____ - _____

HRS _____

HRS _____ - _____

SEQUENTIAL CHRONOLOGY OF TYPICAL WORK DAY:

(Include all job tasks)

8:45 Report to work site, use toilet, feed & water Charger

8:55 *Clock in*

9:00 *Get daily assignment from supervisor*

9:05 *Load basket and begin delivery rounds*

10:30 Break

10:45 *Continue delivery rounds*

12:00 Lunch

12:30 Check with dispatcher for specialty deliveries or equipment deliveries

12:35 *Make deliveries*

1:30 **Clock out**

1:40 *Meet taxi at transport entrance*

MG&A

TYPE OF JOB TASK Core Job Task

(Core, episodic, job-related)

NAME OF JOB TASK Delivery Tech

HOW OFTEN PERFORMED: *Every day, during morning hours*

CONTENT STEPS/SKILLS	STRATEGY FOR FACILITATION (Including instructional and natural cues and adaptations)
----------------------	---

1. *Report to area supervisor for duty or additional assignment.*
2. *Receive department sheet containing delivery routing.*
3. *Locate cart with daily print-outs.*
4. *Locate first department on list & match to department in cart.*
5. *Scan bar code with scanner to enter employee code and time.*
6. *Load first department in basket on scooter.*
7. *Check department off delivery routing sheet.*
8. *Repeat Steps 4&5 until basket is loaded.*
9. *When basket is loaded, proceed to first department.*
10. *At appropriate department, enter, and locate reception person.*
11. *Locate department's daily print-out from basket.*
12. *Scan the bar code to enter time delivered.*
13. *Exit department.*
14. *Repeat Steps 9 -13 until basket is empty.*
15. *Return to Transport Department for restocking and repeat Steps 1 -15.*

NAME OF JOB TASK *I. V. Pump Delivery*

CONTENT STEPS/SKILLS

STRATEGY FOR FACILITATION

(Including instructional and natural cues and adaptations)

1. *Report to area supervisor after lunch.*
2. *Receive delivery list for I. V. pumps.*
3. *Go to I.V. pumps storage shelves.*
4. *Count the total number of pumps to be delivered.*
5. *Select a pump from the sheff.*
6. *Check the pump to insure that it has be cleaned and reconditioned.*
7. *Enter the patient room or hospital room # into the scanner.*
8. *Scan the bar code on the pump to enter data.*
9. *Repeat Steps 5 - 8 until eight pumps have been loaded into the basket.*
10. *When basket is filled, visually scan list to determine lowest floor and closest room.*
11. *Proceed to the nearest floor selected for delivery.*
12. *At appropriate room, determine nearest nurse s station.*
13. *Proceed to the nearest nurse's station and report a delivery to the attending nurse.*
14. *Enter the department code and room number into the scanner.*
15. *Scan the pump and give it to the attending nurse.*
16. *Repeat Steps 11-15 until basket is empty.*
17. *Return to Transport Department to refill basket.*

Use multiple sheets for this page

**UCPA CHOICE ACCESS PROJECT
JOB FACILITATION PLAN**

Choice Participant ANDREW COLLINS Site LONG ISLAND
 Employer SUNY HOSPITAL AT STONY BROOK Date JULY 28, 1992
 Employer Contact WALTER FREDERICKS For Month of AUGUST 1992
☒ Initial Month of Work
☐ Not Initial Month of Work
 Service Provider A.C.L.D. Job Facilitator ELISSA SIMPSON

This form is designed to describe the support plan for the initial employment of UCPA Choice Access Project participants. This plan is designed to be directed by the employer of the participant, in cooperation with the service provider selected by the participant. Employers should understand that the services paid for under this plan on behalf of the participant should represent accommodations which goes beyond that typically offered to employees who need additional supports in order to perform their jobs. Every effort should be made to use the existing training and orientation features of the work place as the primary means of support and to use the project funds in a back-up role.

The service provider agrees to fill out and submit the plan and to supplement, rather than substitute for the employer's training and orientation procedures. Both parties are encouraged to be creative in maximizing the funds available for support.

This plan should be revised monthly, based on the changing support needs of the employee. If either party has questions concerning the development of the Job Facilitation Plan, please contact your local Choice Coordinator or the project office at (601) 497-6999.

Based on the Job Analysis developed for this participant and approved by the Employer:

Week 1 Date Aug 3-7

Hours worked by Participant	<u>20</u>			
Hours of support by Employer	<u>10</u>			
Hours to be supported by Service Provider	<u>22.5</u>	Hourly Rate	<u>\$25</u>	Total <u>\$562.50</u>
Hours of other paid supports*	<u>0</u>	Hourly Rate	<u>0</u>	Total <u>0</u>

(Attach detailed plan which describes supports in relation to participant's daily schedule)

Week 2 Date Aug 10-14

Hours worked by Participant	<u>20</u>			
Hours of support by Employer	<u>10</u>			
Hours to be supported by Service Provider	<u>22.5</u>	Hourly Rate	<u>\$25</u>	Total <u>\$562.50</u>
Hours of other paid supports*	<u>0</u>	Hourly Rate	<u>0</u>	Total <u>0</u>

(Attach detailed plan which describes supports in relation to participant's daily schedule)

Week 3 Date Aug 17-21Hours worked by Participant 20Hours of support by Employer 10Hours to be supported by Service Provider 15 Hourly Rate \$25 Total \$375⁰⁰Hours of other paid supports 0 Hourly Rate 0 Total 0
(Attach detailed plan which describes supports in relation to participant's daily schedule)Week 4 Date Aug 24-28Hours worked by Participant 20Hours of support by Employer 10Hours to be supported by Service Provider 15 Hourly Rate \$25 Total \$375⁰⁰Hours of other paid supports _____ Hourly Rate _____ Total _____
(Attach detailed plan which describes supports in relation to participant's daily schedule)

* These are payments made to purchase supports from co-workers, personal assistance providers and others.

Estimate the total monthly cost for supports: \$1,500

Provide a brief description of the support plan:

FOR THIS INITIAL MONTH, THE SERVICE PROVIDER WILL OFFER 75 HOURS OF SUPPORT TO THE EMPLOYER AND EMPLOYEE. THE EMPLOYER WILL PROVIDE A CO-WORKER WITH EXPERIENCE FOR 10 HOURS PER WEEK, FOR EACH WEEK THIS MONTH

Approval of plan: (Please sign & date)

Employer Walter FredericksDate 7/28/92Service Provider Ellena JensenDate July 28 1992Choice Participant Adam CollinsDate "

For UCPA Project Office use only:

Choice Coordinator Approval _____
Voucher Accountant Approval _____Date _____
Date _____

**Job Facilitation Plan
UCPA Choice Access Project**

Choice Participant ANDREW COLLINS

Site Long Island

Employer SUNY Hospital

Dates AUGUST 1992

Job to be supported DELIVERY TECH

☒ Initial Month of Work
☐ Not Initial Month

(Use .25, .50, .75 and 1.0 hourly time units)

Daily Work Schedule (Describe work activities sequentially)	Time (Use actual times)	Employer hours (no cost)	Service Provider hours	Other paid support
① ARRIVE AT WORK	9:50-10:00A			
② REPORT TO SUPERVISOR	10:00-10:15	.25	.25	
③ LOAD BASKET FOR 1 ST RUN	10:15-10:30	.25	.25	
④ DELIVER Printouts to Depts	10:30-11:30	1.0	1.0	
⑤ MORNING BREAK	11:30-11:45	-	.25	
⑥ LOAD BASKET FOR 2 ND RUN	11:45-12:00	-	.25	
⑦ DELIVER PRINTOUTS to Depts	12:00-12:45	-	.75	
⑧ LUNCH	12:45-1:15	-	.50	
⑨ PREPARE FOR IV Pump DEL.	1:15-1:30	.25	.25	
⑩ DELIVER IV PUMPS	1:30-2:30	1.0	1.0	

Total Hours 4.5 2.75 4.5 0