

MANAGEMENT SKILLS FOR SEMP LEADERS VIRTUAL



DISCOVERY REVIEW WORKSHEET

Individual Name:

Agency Name:

Date Discovery Reviewed:

Reviewer Name:

Discovery Completed (# months):

If Discovery was not completed within recommended time, please explain reason(s):

The purpose of this review tool is to assist managers when reviewing the Discovery/Career Plan for quality, comprehensiveness, and completion. It also allows the manager to identify any areas where staff may need training to assist them in completing quality Discovery Reports.

You will receive this review worksheet if the ETP Supervisor has identified any concerns with a submitted Discovery. Please work with your staff to address the questions and concerns and return the updated Discovery. You may also use this tool internally to review Discoveries before they are sent to OPWDD.

REVIEW OF RECORDS: Completed Satisfactorily Not Completed Satisfactorily

1. Was each section completed fully and comprehensively?
2. Are all interpersonal, physical, medical, behaviors, and safety challenges described?
3. Is there a comprehensive review of the individual's past or present work or volunteer experiences (including other programs and school)?
4. Do school records provide a description and level of support received during participation in school?
5. Did the staff discuss the potential effects of wages on the individual's benefits and if so, was a person identified to assist the individual with reporting wages?
6. Upon review of all records, do you have a clear understanding of the cognitive abilities of the person (i.e.: learning style, etc.)?

INTERVIEWS OF THE INDIVIDUAL, SUPPORT STAFF, FAMILY, AND FRIENDS:

Completed Satisfactorily Not Completed Satisfactorily

7. Was there a good representation of interviews with family, friends, and support staff from each service they receive completed?
8. Do the interviews describe work preferences of the individual and the perceived work preferences by family/friends and support staff?
9. Do the interviews have a detailed discussion of how independent the individual is in the community or any concerns regarding safeguards?
10. Do the interviews have a clear description of things that would impact the individual's ability to obtain or maintain employment (behavioral, medical, social, benefits, hygiene, environmental, etc.)?

OBSERVATIONS: Completed Satisfactorily Not Completed Satisfactorily

11. Was each section completed fully and comprehensively?
12. After reading the description of what tasks the individual successfully completed during the observations what was the level of support needed to successfully complete these tasks?
13. Is there a detailed description of any observed challenges/concerns regarding physical limitations, dress and hygiene, interactions/communication with others, etc.
14. Do the observations describe the individual's level of engagement or what motivated or demotivated the person?
15. Do the observations describe behaviors or skills that would be transferrable to employment?

COMMUNITY-BASED EXPERIENCES / SITUATIONAL ASSESSMENTS:

Completed Satisfactorily Not Completed Satisfactorily

16. Was the required number of work experiences completed and were they relevant to the individuals' preferences identified in previous sections?
17. Did all work experiences in the community include typical work tasks and were clearly described?
18. If there were concerns regarding the individual's hygiene/grooming per site expectations, were they noted in the Discovery?
19. Is there a detailed description of the individual's interpersonal, communication skills and challenges and how they would impact employment?
20. Is there a detailed description about the individual's response to supervision/coaching/requests from others?
21. Is there a detailed description of whether the individual had any limitations with the required academic skills (reading/math)?
22. Is there a detailed description of whether the individual had any stamina, physical or medical concerns related to performing work tasks?
23. Is there a detailed description of what environmental factors are most important for the individual's success at each assessment site?

DISCOVERY REPORT FINDINGS: Completed Satisfactorily Not Completed Satisfactorily

24. Are the findings consistent with ALL the information gathered throughout the Discovery?
25. Were the strength and support needs connected to the vocational/employment goals for the individual?
26. Has all the information in this section been completed with a good description?

27. Were transportation options and challenges fully assessed and described?

28. Has there been a discussion regarding the persons availability to work to be realistic and flexible to meet the needs of the business?

CAREER RESEARCH: Completed Satisfactorily Not Completed Satisfactorily

29. Do the recommended careers have a corresponding community-based experience and been researched in ONET?

30. Are there descriptions of the job duties/responsibilities from each ONET career researched AND are individual's skills and abilities discussed using information gathered in this Discovery (i.e.: seen in a situational assessment or observation, learned in an interview, etc.)?

RECOMMENDATION: Completed Satisfactorily Not Completed Satisfactorily

31. Is the recommendation consistent with the Discovery findings?

32. Was the Discovery Report reviewed for content, quality, and accuracy is attested to and signed by the SEMP/Employment Manager?

33. Did the staff meet and/or confer with the individual and their support team to review the Discovery and discussed whether the person is ready for job development or needs to develop additional vocational skills/experiences?

34. If received, is the Job Development Plan or Vocational Plan consistent with the Discovery Report?

SEMP Service Definitions

Vocational assessment	Reviewing PTE Discovery Reports/Employment Plans, interviewing an individual and support team, observing in various settings, reviewing records, administering test or performance reviews, etc. to identify employment interests and support needs.
Person-centered employment planning	Person-centered employment planning is an approach to forming vocational goals that are centered on the dreams, interests, skills and desires of the person for whom they are built.
Job-related discovery	Observation of the individual performing work skills and career research with the individual in order to determine the person's career interests, talents, skills, and support needs.
Job development, analysis, customization, and carving	Includes developing relationships between an individual and business/potential employer to develop opportunities that facilitate matches among the person's strengths and interests and work conditions and the identified needs of the business. Includes job analysis, customization, and carving customized opportunities.
Training and systematic instruction prior to employment	Including individualized and appropriate work-related behaviors (e.g., resume building, interview instruction, customer service, following workplace policies, workplace communication, dressing for work).
Job placement	Includes planning and communication with the person and their support team, interviews, coordination and instruction, assisting with job applications and/or testing, developing job accommodations, acquisition of job supplies/clothing, creating a training and orientation plan with the employer and job negotiation.
On-the-job coaching, and training, and planning within the work environment	Includes training tailored to the needs of the individual including job analysis to identify job duties, assistance in learning work-related tasks and routines, providing support to the individual and business such as advocacy, disability awareness-building, job adaptations, social support, problem-solving, development of natural supports.
Development and review of a business plan (for individuals pursuing self-employment)	A business plan is for individuals who are pursuing self-employment or who are self-employed. Includes identifying skills that could be used to start a business, and identifying business training and technical assistance that could be used in achieving self-employment goals.
Transportation between activities	Transportation with the person includes time that the service provider spends transporting individuals to and from their jobs or employment-related activities such as transportation to an interview, job site, etc.

Travel training	Training designed to teach individuals how to travel safely and independently on public transportation (including buses, walking, subway, Para-transit, etc.)
Development of soft skills and retention strategies	Includes instruction and assistance with social interactions and customer service, maintaining relationships with coworkers and supervisors, team work, workplace etiquette, requesting assistance, etc.
Benefits support and asset development	Includes counseling an individual and his or her family about the impact of wages on Social Security, Medicaid, food stamps, and other benefits and providing information to an individual and his or her family on Work Incentive Programs and the Ticket-to-Work Program.
Career advancement services	Include reviewing and updating employment goals, developing plans to achieve his or her goals and assisting with the steps to assist the person to gain the skills, experience, and knowledge needed to be successful in their identified career.
Other workplace support services	Facilitating workplace accommodations such as assistive technology, job restricting, and schedule modification; co-worker and employer supports; and employer-sponsored programs and policies such as return-to-work policies, disability case management, and company policies.
Negotiating potential jobs with prospective employers on behalf of an individual	Job developers act as representatives or agents to the seeker, directed by the job seekers conditions, interests and specific contributions in strategically negotiating with an employer the best-fit employment conditions and environment that will ensure the job seekers success.
Communication with existing employers	Includes reviewing the individual's progress, work expectations, work challenges and developing strategies to address challenges and promote success in the job.
Communication with family/circle of support	Includes communication with family or other members of the person's support team to discuss and address employment-related issues such as management of benefits, challenges in the work environment, transportation, etc.
Communication with other OPWDD services staff	Includes communication and meeting with the person and the members of their support team regarding planning for employment, planning for job retention, strategies for employment challenges and career development planning.
Documentation of delivery of SEMP services	As required by the regulations and to evaluate the quality of services (e.g., purpose of services, response to services, tracking outcomes, planning for improved services for specific individuals).
Other activities previously approved by OPWDD	Contact OPWDD if you have questions.

Allowable Services without Individual Present

<p style="text-align: center;">Billing for SEMP Services Delivered Without the Individual Present</p>	<p>Some SEMP services may be delivered on behalf of an individual who is not actually present at the time of service delivery. Such services include: discussions with families about transportation to a job or benefits planning, meetings with businesses about hiring an individual, development of the SEMP Service Delivery Plan (also known as the Habilitation Plan), documentation of the delivery of SEMP services, travel to a job site to provide coaching services, etc. These services may be delivered and billed for during times when an individual may also be receiving another OPWDD service. This is not considered double billing because the individual is receiving two separate services.</p>
<p style="text-align: center;">Billing for Transportation (Staff Travel Time)</p>	<p>Transportation (staff travel time) is an allowable billable service in the Intensive and Extended phases of SEMP. Allowable travel time includes time that a job coach, job developer, employment specialist, or other staff with a similar job title travels during the day, evening, or weekend to job sites to provide SEMP services; meetings with potential and current employers, conducting vocational assessments; attending OPWDD Innovations trainings designed to enhance the quality of SEMP services, and providing other billable SEMP activities. Travel may be with or without the individual receiving SEMP services. Travel time that occurs during work hours when staff is being paid by a service provider is billable. Travel time should be billed to either an individual or group activity with specific SEMP participants identified. SEMP services provided during the evening or weekends are considered work day services.</p>
<p style="text-align: center;">Innovations Trainings</p>	<p>Travel time to OPWDD’s Innovations Trainings is billable as long as the staff is being paid by the service provider during the time of the travel. Such travel must be billed using the group fee for up to five individuals. Even if the staff has a larger caseload, billing is limited to a maximum of five individuals. If more than one staff travel to a 6 hour OPWDD Innovations Training, each staff person can bill using the group fee for travel time (up to five individuals), but they cannot bill for the same individuals. Staff travel to non-billable activities, such as travel to lunch or a destination where SEMP services are not being provided, is not considered allowable travel time. Service provider paid staff time spent participating in OPWDD’s Innovations in Employment Supports Trainings can be billed as “other activities”.</p>
<p style="text-align: center;">Billing for Meetings</p>	<p>Time spent attending meetings with an individual or on behalf of an individual receiving SEMP services is billable. If multiple staff attend a meeting, the billing may be split between the multiple staff or billed to only one staff person.</p>

SAMPLE
SUPPORTED EMPLOYMENT (SEMP) MONTHLY SUMMARY NOTE

AGENCY NAME: _____ **MONTH / YR OF SERV. DELIVERY :** _____

INDIVIDUAL'S NAME: _____ **TABS ID :** _____ **MEDICAID # :** _____

<i>Summarize the Supported Employment (SEMP) Services provided this month.</i>	
Summarize the implementation of the individual's Supported Employment (SEMP) Habilitation Plan for the month	
Description of the individual's vocational progress	
Description of some of the actions of staff to address vocational challenges	
Description of the individual's response to services provided	
Describe any issues or concerns	

The narrative monthly summary note must be completed, signed, and dated no later than the 30th day after the month of service.

SIGNATURE OF STAFF PERSON WRITING THE NOTE
(required)

TITLE

DATE (mth/dy/yr)

SIGNATURE OF STAFF PERSON REVIEWING THE NOTE

TITLE

DATE (mth/dy/yr)