

A Case Study in Discovery



Eleversity
NEXT-LEVEL WORKFORCE EDUCATION

Levi

Case Study

Case Study in Discovery — Breakout 1

Each group will be assigned areas from Section 5, Discovery Report Findings, up to *Supervision Needs*.

Using the information from the file research, interviews, and observation assigned to your group, consider these questions:

- ? What more do you need to know?
 - ? What further assessments need to happen to create a full picture of the individual's strengths or support needs?
 - ? What information is still missing or unclear?
 - ? What themes do you see?
- Identify at least 4 questions your group still has and how you will assess. Be specific, detailed, and support your plan.

Choose a spokesperson to report out.

Notes:

Case Study in Discovery — Breakout 1

1	Physical / medical / mental health / stress management	
	Communication and social interactions	
	Focus / attention to task	
	Productivity / work pace	
2	Safety / environmental awareness	
	Personal grooming / hygiene	
	Initiative / motivation to work	
	Environmental preferences	
3	Job duties and environments to be avoided	
	Transportation and work availability	
	Supervision needs	
	Other	

Levi — Case Scenario 3 -Timeline

Levi – Case Scenario 3	
2008	Begins Kindergarten
2008	Testing and assessment in school determine diagnosis of Autism and ADHD
2008-2021	Individual Education Plan [IEP]
3/2019	Psychological Report
2019-20	2.5 work-based learning experiences through high school
2021	Graduates high school — Local Diploma—C-DOS
6/2021	Applies to ACCES-VR for Supported employment. Application declined
9/2021	CPV – Somuch Work for All
12/2021	CPV Annual assessment -> Recommended for Discovery
2/5/2022	Begins Discovery — Somuch Work for All

Levi – Case Scenario 3

Name: Levi

Age: 21

DOB: 4/6/2003

Levi lives with his mother in an apartment. His mother works as an RN at Samaritan Medical Center, Watertown, NY. Levi's parents are divorced, and he continues to split his time between his parent's homes. His father lives in Watertown and works at Fort Drum. Levi's father is remarried to his stepmother, Samantha, and they have 3 small children. Levi's parents live 13 miles away from each other.

Levi enjoys spending time with friends and playing video games. He loves sports and playing with his friends at the local park. Levi reports he has a girlfriend that he spends time with when he's with his mother. Levi has a rescue dog that he is responsible to care for. This includes feeding, pooper-scooping, walking, and bathing.

Levi graduated from Watertown High School with a C-DOS and a local diploma 6/2021. Levi had an IEP throughout school. Levi had 2 WBL experiences and 1 partial WBL experience, which ended early due to COVID-19 shutdown. Levi's last 1.5 years of HS were completed virtually. Due to the shutdown, Levi was unable to participate in his other WBL experiences. After HS Levi applied to ACCES-VR but it was recommended that he needed to work on his employability skills. Since 9/2022 Levi has been doing well in CPV and his annual assessment demonstrated that he was ready to begin Discovery and the employment process.



EMPLOYMENT TRAINING PROGRAM DISCOVERY REPORT ⁷

Name: Levi Smith TABS ID #: 12345

SEMP Agency: Somuch Work for All DDRO: Choose One

Date Discovery Started: 2/2/22 Date Report Completed: _____

PURPOSE: To gather information relevant to employment and analyze and synthesize this information into a recommendation for meeting the individual’s career and vocational goals. Discovery through **Exposure, Exploration Experience, Evaluation, Education, and Empowerment** will also prepare the individual for competitive employment.

The Discovery Report and recommendation must be completed and then **reviewed and approved by your supported employment services management**. After the Discovery Report has been reviewed and approved by your Supported Employment Manager, please forward it to the ETP Supervisor.

If job development is authorized by the ETP Supervisor, a Job Developer can use this information to develop a job that matches the individual’s skills and abilities. If other services are recommended, the support team can use this information to coordinate services that will help the individual achieve their employment goals.

DISCOVERY ACTIVITY	MINIMUM EXPECTED HOURS	RECOMMENDED HOURS	ACTUAL HOURS PROVIDED
Review of Records	4	4-6	_____
Interviews of the Individual, Support Staff, Family, and Friends	4	6-8	_____
2 Observations of the Individual	4	6-8	_____
Individualized Assessment Site Development	2	2-6	_____
2 Community-Based Experiences / Situational Assessments (min 12 hours each)	24	24-40	_____
Discovery Report Findings	1	1-2	_____
Career Research	2	4-6	_____
Recommendation, Review, and Approval	1	1-2	_____
Other (Communication, Travel Time, Documentation, Planning Meetings)	13	15-25	_____
TOTAL	55	65-90*	_____

**Additional hours may be authorized by an ETP Supervisor if justified.*



Name: Levi Smith TABS ID #: 12345

1. REVIEW OF RECORDS

PURPOSE: To obtain, review, and summarize documented information from the services the individual is currently receiving or has previously received. Records contain valuable information about an individual's background, progress, skills, abilities, preferences, experiences, and support needs. Researching this information will help determine the individual's ability to obtain and/or maintain employment.

INSTRUCTIONS: Check off each item reviewed in the list at the top of the Review of Records Worksheet and complete each section as records are reviewed. **Documents marked with * are required. Documents marked with ** are required if the individual is currently enrolled in the service or was enrolled in the last 3 years.** Note all information that is relevant to obtaining or maintaining employment. Additional comments may be included separately if needed. Label additional comments with specific page numbers and questions.

A thorough review of records requires **4-6 Hours**; some of these hours may be used in obtaining them.

Name: Levi Smith TABS ID #: 12345

REVIEW OF RECORDS WORKSHEET

Documents marked with * are required. Documents marked with ** are required if the individual is currently enrolled in the service or was enrolled in the last 3 years.

RECORDS OBTAINED AND REVIEWED:

- | | |
|--|---|
| <input type="checkbox"/> *Life Plan Dated: _____ | <input type="checkbox"/> *Psychological Report Dated: _____ |
| <input type="checkbox"/> Adaptive Behavior Scale | <input type="checkbox"/> IPOP (if applicable) |
| <input type="checkbox"/> **School Records / IEP | <input type="checkbox"/> **Day Habilitation |
| <input type="checkbox"/> **Prevocational | <input type="checkbox"/> **Community / Residential Habilitation |
| <input type="checkbox"/> **OPWDD Supported Employment (SEMP) | <input type="checkbox"/> **ACCES-VR |

LIFE PLAN / PSYCHOLOGICAL / ADAPTIVE BEHAVIOR / IPOP RECORDS:

Diagnosis: Autism, ADHD, LD Full Scale IQ: 68

Reading Level: Grade Level: R—6.8 Mathematical Skills: Grade Level: M—5.9 [TABE]

Noted behaviors that could impact employment: *Attach Behavior Support Plan if applicable*

Levi has challenges with boundaries and social engagement. He over-shares information, asks personal questions, and laughs at inappropriate moments. He can be impulsive when learning new things, to the exclusion of safety. Doesn't listen well, which means following directions is sometimes impossible. Quick to anger and has a hard time regaining control. [No BSP]

Physical, Medical, and Mental Health needs:

Levi has no physical limitations nor health concerns. He is in counseling for his impulsivity and actions toward others. Levi takes Adderall for his ADHD.

Other factors that could impact employment:

- Levi has difficulty with focus and concentration when learning new tasks.
- With Levi splitting his time between his parent's homes, the location of, and transportation to his worksite may be challenging.
- Levi has no paid work experience and very little experience with work activities in a community setting.

Name: Levi Smith TABS ID #: 12345

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-
- Reviewed the individual's Life Plan Safeguards and IPOP for time alone in the community.

If time alone in the community is limited, describe conditions where the individual can be independent:

Levi has no restrictions to independence in the community. When participating in CPV, he is often alone for a few hours without supervision. No history of wandering off. At both parent's homes he is able to come and go as he wishes. He has a phone and knows how to use it.

Describe any plans to increase the individual's independence in the community:

Levi wants to learn to drive, although his parents are concerned with his impulsivity. His parents are taking it very slow in helping him study for the permit test.

From the Life Plan, list valued outcomes related to employment:

1. Levi would like to work and make money.
2. Levi has expressed the desire to meet new people and make friends.
3. Levi is interested in learning how to use public transportation.

Select current service type(s) listed in the Life Plan:

- | | |
|---|---|
| <input type="checkbox"/> Day Habilitation | <input type="checkbox"/> Community Based Prevocational |
| <input type="checkbox"/> Sheltered Workshop | <input type="checkbox"/> Community / Residential Habilitation |
| <input type="checkbox"/> Site Based Prevocational | <input type="checkbox"/> Supported Employment (SEMP) |
| <input type="checkbox"/> Other (specify): _____ | |



Name: Levi Smith TABS ID #: 12345

SCHOOL RECORDS / IEP: (if individual left school less than 3 years ago)

Exit Date: 6/2021 School: Watertown Highschool

Disability Classification: ASD/ADHD/LD

Related Services: _____

Diploma / Credential: Local Diploma & C-DOS

1:1 Support / Aide

Yes No [during some activities]

Extended School Year

Yes No

Academic Performance:

Unable to reach teacher. Mailed request for Student Exit Summary

Student strengths / preferences / interests:

Same as above

Social Development:

Same as above

Management Needs / Support Needs in the Community:

Same as above

Transition Activities (attach Exit Summary if available):

Same as above

Briefly summarize the individual's SCHOOL RELATED work experiences:

Business	Tasks performed	Liked/disliked
Price chopper	Facing canned food, checking expiration dates	Liked
City Parks	Picking up garbage, empty garbage bins, weeding garden beds	Seemed indifferent
Watertown Zoo [partial exp.]	Helped preparing food for animals, cleaning some habitats, picking up garbage	Liked all except cleaning habitats



Name: Levi Smith TABS ID #: 12345

DAY HABILITATION RECORDS:

Never Participated **Previously Participated** **Currently Participating**

List 3 Day Habilitation Staff Action Plan Goals:

1. _____
2. _____
3. _____

List Service Specific Safeguards:

PREVOCATIONAL RECORDS:

If the individual is receiving or has received Prevocational Services, select all that apply:

Never Participated **Previously Participated** **Currently Participating**

Sheltered Workshop

Dates: _____ Provider: _____

Reason for leaving: _____

Site Based

Dates: _____ Provider: _____

Est. # of Days/Week: _____ Location(s): _____

Paid Unpaid

Reason for leaving: _____

Community Based

Dates: 6/21/22 Provider: Somuch work for All

Est. # of Days/Week: 5 Location(s): Goodwill Thrift Store

Paid **Unpaid**

Reason for leaving: Still there



Name: Levi Smith TABS ID #: 12345

List 3 Site-Based and/or Community Based Prevocational Staff Action Plan Goals:

- 1. Levi wants to tryout different work
- 2. Levi wants to make friends at work
- 3. Levi wants to learn how to be a team player

List Staff Activities in support of the Plan:

Staff will support Levi in various work experiences
Staff will teach Levi about connecting with people at work
Levi will have work experiences that require teamwork

List Service Specific Safeguards:

Levi does not have any reported safeguards

COMMUNITY / RESIDENTIAL HABILITATION RECORDS:

- Never Participated** **Previously Participated** **Currently Participating**

List 3 Community and/or Residential Habilitation Staff Action Plan Goals:

- 1. _____
- 2. _____
- 3. _____

OPWDD SUPPORTED EMPLOYMENT (SEMP) RECORDS

- Never Participated** **Previously Participated** **Currently Participating**

Previous ETP Discovery Year: _____ Outcome: _____

Previous Pathway to Employment Discovery Year: _____ Outcome: _____

Previous Job Development Outcome: _____

Working and being paid minimum wage or more current previous



Name: Levi Smith TABS ID #: 12345

ACCES-VR SUPPORTED EMPLOYMENT RECORDS

Never Participated Previously Participated

Provider: _____

Dates active with ACCES-VR: _____

Reason for ACCES-VR Closure: Application declined; reason unknown [11/2021]

List services funded by ACCES-VR and their outcomes. Note any assessments, work experiences, job development with type of job, placements with location / dates, travel training, and reasons for closure:

Has the individual completed any diagnostic vocational evaluations or other vocational assessments?
 Yes No If Yes, attach a copy of the report(s).

BENEFIT INFORMATION

List the benefits that the individual currently receives (SSI, SSDI, SNAP, Section 8, OPWDD ISS):

- 1. SSI [social security income] _____
- 2. SNAP [supplemental nutrition assistance program] _____
- 3. _____
- 4. _____
- 5. _____

Has the individual sought benefit advisement?
 Yes No No Benefits

Name: Levi Smith TABS ID #: 12345

If the individual has not sought benefit advisement, are they planning to?

Yes No

If the individual has sought benefit advisement, where and when was it provided?

Location / Agency: _____ Date: _____

Does the individual understand that earning money might impact their benefits?

Yes No No Benefits

Does the individual understand how and when to report their wages?

Yes No No Benefits

Who is responsible for supporting the individual with reporting their wages?

Name: Not determined Relationship: _____

VOLUNTEER / PAID EMPLOYMENT HISTORY (FROM ALL RECORDS):

(Include information from experiences noted on pages 6-8)

Briefly summarize the individual's **VOLUNTEER** experiences:
(attach additional sheets as needed, also attach résumé if available)

<u>Business Name</u>	<u>Dates</u>	<u>Tasks</u>	<u>Reason for Leaving</u>
Watertown Public Works	9/21/21- 10/2/21	Cleaning bathrooms, Sweeping, mopping	Disliked
Goodwill Thrift	10/3/21	Sorting hangers, organizing donations	Still There
_____	_____	_____	_____
_____	_____	_____	_____

Briefly summarize the individual's **PAID EMPLOYMENT** history:

No paid employment

(attach additional sheets as needed, also attach résumé if available)

<u>Business Name</u>	<u>Dates</u>	<u>Tasks</u>	<u>Reason for Leaving</u>
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____



Name: Levi Smith TABS ID #: 12345

What career development activities did the individual complete such as career assessments, job readiness classes, job shadowing, vocational classes, etc.? What were the results of those activities?

None Completed

Reviewer's additional comments after reviewing all records:

Based on Levi's file it is apparent he does not have much work experience, nor vocational direction. There are several vocational gaps related to the shutdown during COVID and the lack of variety in WBL experiences in school. Levi is a pleasant young man and his enthusiasm for wanting to work is energizing, but his ideas about the type of work he would like to do is not focused or based on self-knowledge.

Completed by: _____ (print)

Date: _____

Name: Levi Smith TABS ID #: 12345

2. INTERVIEWS OF THE INDIVIDUAL, SUPPORT STAFF, FAMILY AND FRIENDS

PURPOSE: To obtain various perspectives on the individual's background, progress, skills, abilities, preferences, experiences, and support needs through discussion of these subjects with the individual and their stakeholders. Each perspective will provide information relevant to the individual's ability to obtain and/or maintain employment.

INSTRUCTIONS: Interview the individual, Care Manager, family and/or friends that know them well, and at least one support staff from each service they currently receive. It is recommended to also interview support staff from services they previously received. Complete an Interview Worksheet* for each interview. Interview Worksheets are provided in a separate document to be used as a guide.

Questions may be rephrased, omitted, or added as needed to obtain detailed information. Compare the information gathered through all the interviews and summarize it in the Interview Summary Worksheet. Additional comments may be included separately if needed. Label additional comments with specific page numbers and questions.

**Completed Interview Worksheets may be requested by the ETP Supervisor.*

Each thorough interview requires **1-2 Hours**; recommended total interview time is **6-8 Hours**.

Name: Levi Smith TABS ID #: 12345

INTERVIEW SUMMARY WORKSHEET

INTERVIEWEE'S NAME	RELATIONSHIP	SERVICE PROVIDER - TYPE	DATE OF INTERVIEW
ETP Participant (required)	Self	N/A	2/5/22
Harry	Care Manager	Care Coordination	3/12/22
Mindy	Mother		3/6/22
Martha	CBPV	Community Work Exp	3/5/22

Answer Based on the information obtained during the interviews:

List Potential Career Options mentioned by the interviewees:

<u>Cart pusher [mother]</u>	<u>Laborer [Martha/Mindy]</u>
<u>Stocking merchandise [Martha]</u>	<u>Amusement Park [Levi]</u>
<u>Zoo [Levi]</u>	<u>Movie theater ticket taker [Levi]</u>

What connections or relationships do the interviewees have with businesses in these career areas?

- ✓ Levi has a friend at the Watertown Zoo, and he did a partial WBL experience during HS
- ✓ Mindy says there is grocery store within walking distance, and he can push carts or stock. She shops there all the time and is friendly with the manager.
- ✓ Levi reports that he has connections at the theater, as his father used to work there as the manager.

What are the environmental needs of the individual, as expressed by the interviewees?

Opinions were mixed about Levi's best work environment. Martha [CPV] believes Levi would do best in a structured, quiet, indoor environment with readily available supervision. Mindy [mother] is worried about transportation and wants a job close to home that Levi can walk to. She also thinks Levi does best when part of a team and could work in or outside. She said he is always outside with his friends. Mindy agrees that Levi needs close supervision or someone he can go to with questions.

Describe any schedule or transportation constraints mentioned by the interviewees:

Mindy [mother] is not sure about transportation at this point. She says that if it's possible to take him or pick up she will, however, she works long hours and often is required to stay late. Levi said his father or stepmother will take him to work when he stays there; his stepmother does not work.

Levi said he can take the bus if someone shows him the route, and he has his bike in the summer.

Name: Levi Smith TABS ID #: 12345

Describe types and / or levels of supervision discussed by the interviewees:

Martha [CBPV] states that typically, Levi responds well to instruction, but he has gotten frustrated and had “outbursts” on the job. This often happens early in the learning process when he may be struggling. She also said that Levi has had conflicts with co-workers when he feels they are telling him what to do, as he does not see them as an authority.

Levi learns best doing and repetition. He gets frustrated watching someone do something and wants to dive in.

List 5 factors discussed during the interviews that could impact the individual’s ability to obtain and maintain employment: (family concerns, loss of benefits, hygiene, behavior, transportation, independence, etc.)

1. Levi may be distracted when many people are in the work environment or if the environment is confusing.
2. Levi is quick to anger when he’s frustrated.
3. Transportation may be a problem.
4. Mother voiced some concern about loss of benefits or overpayment.
5. Levi does not have a realistic view of his abilities and will always say he knows how to do something, even when he doesn’t know.

Describe the individual’s independent activities in the community:

Levi is completely independent in his neighborhood. He often hangs out with his friends’ playing sports and walking his dog. Mindy [mother] states she often sends Levi to the store to pick up items. Mindy states Levi needs assistance orienting in a new setting but will acclimate quickly. In CBPV, Levi is transported to and from the site. He is often left alone for an hour, but supervisor is readily available.

List 3 new things that you learned about the individual through interviews:

1. Levi has a strong social group from HS
2. Levi is an animal lover and knowledgeable about how to care for animals, large and small
3. Levi has a strong desire for increased independence, such as getting his own apartment with a friend.

Interviewer’s additional comments:

It was a common theme from all who know Levi that he is a good kid, but immature and impulsive. He is grandiose in his view of his skills and abilities and believes that adult success will just happen. He has a good relationship with both parents and his parents work together to support Levi. Levi’s father was unable to attend a meeting as he had to work but he did have a conversation with Mindy about what he could do to support Levi.

Completed by: _____ (print) Date: _____

Name: Levi Smith TABS ID #: 12345

3.OBSERVATION OF THE INDIVIDUAL

PURPOSE: To obtain information about the individual’s interests, motivators, interpersonal/soft skills, independence, behavior, physical ability, self-care skills, safety awareness, and support needs through direct observation. Observation will reveal information about how an individual reacts to various social and physical environments. This information can be related to how they might react to similar environments and the expectations found in employment.

INSTRUCTIONS: Directly observe the individual in a setting where they can demonstrate their full range of skills and abilities on preferred activities. **Observations cannot take place at the same locations as Situational Assessments.** Complete an “Observation of the Individual Worksheet” for each Observation. Additional Observations and Worksheets may be completed if they are pertinent to the individual’s employment needs. Additional comments may be included separately if needed. Label additional comments with specific page numbers and questions.

Each thorough observation requires **2-4 Hours**; recommended total observation time is **6-8 Hours**.

Name: Levi Smith TABS ID #: 12345**OBSERVATION OF THE INDIVIDUAL WORKSHEET****Refer to Instructions. Use one Worksheet for each Observation - 2 are required**Location of Observation: Goodwill Thrift Store

Describe the environment and circumstances of the Observation. Note such things as space, time of day, program, staffing, stimuli, etc.:

Levi was sorting giant boxes of hangers and putting them on a rack and sorting donations. The location was the backroom of the store with very little customer contact. There were 4 other people doing these tasks, 2 from another OPWDD program and 1 was an employee of Goodwill. Levi's CBPV Supervisor, Martha was in the building, but she was coaching 3 other people in different locations and was in and out of the area. It was 10:00a, the room was well lit with natural light from the windows, and the temperature was on the cool side, however the people doing the tasks were moving around a lot and didn't seem bothered. There was a radio playing upbeat music in the background. The room smelled musty and was dusty.

of Hours Observed: 3 hrs.

Activities observed:

1. Sorting hangers
2. picking up donations, some heavy, sorting by type and quality

How comfortable was the individual with the activities and the environment and why?

Levi was very comfortable doing these tasks. He was familiar with his co-workers, and they were enjoying each other, telling stories, singing to the music, and laughing at things each was saying.

How did the individual react to the activities and environment?

Levi seemed indifferent to the work activities; it seemed he mostly enjoyed the comradery of his co-workers.

Describe the individual's safety skills / environmental awareness:

There were possible safety concerns, such as a forklift and donated items. Levi was aware of the machinery but was not careful when reaching into the boxes and grabbing items. A supervisor from another agency continually reminded all of the workers to look before sticking their hands into the boxes and bags. He told of a crisis a year ago where someone cut their hand on a knife and required stitches. His continual reminders weren't taken too seriously by any of the workers.

Name: Levi Smith TABS ID #: 12345

Describe the individual's level of engagement and interest in the activities:

Levi had good energy for his activities, but much of the joking and laughing was targeted to the tasks. All seemed to agree the tasks were simple, dirty, and to quote Levi, "work a monkey could do." One frequent topic of conversation was the type of work each wanted to do when they left Goodwill. No one from Goodwill seemed to be overseeing the activity and there didn't appear to be a productivity expectation.

What motivated or demotivated the individual and why?

Levi was motivated by his co-workers. He, as well as the others, frequently stopped working when the joking became distracting, and the group would engage in horseplay. The employee of Goodwill was often the first to return to the task and the others would follow suit.

Describe how the individual overcame any obstacles / challenges during the Observation:

There were no challenges observed or reported

Who supported the individual with the activities?

Martha and the employee from Goodwill supported Levi. Levi's natural supports at work were also helpful and instructional.

What type(s) of support were provided? *Select all that apply*

- Verbal Prompts Written Prompts Picture / Media Prompts
 Visual Cues Modeling / Demonstration Hand-over-hand Support
 Other (specify): _____

What was the individual's response to each type of support?

Levi shifted easily to new requests. He knew these tasks well and required very little support.

If the individual was unable to complete any of the activities, what prevented them from doing so?

Levi was only responsible for 2 task in this observation and was very familiar with both. He didn't seem to be learning anything new.



Name: Levi Smith TABS ID #: 12345

Personal hygiene:

No Concerns Needs Improvement (describe): _____

Interaction with staff:

N/A Cooperative Friendly Anxious Shy Outgoing

Interaction with peers:

N/A Cooperative Friendly Anxious Shy Outgoing

Interaction with members of the community:

N/A Cooperative Friendly Anxious Shy Outgoing

Describe the positive qualities observed that are transferrable to employment:

Levi stayed on task and took initiative to assist people making donations. He was helpful and friendly with people from the community and with his co-workers.

Describe the challenges observed that could hinder employment:

No challenged observed that would impact employment, but this is a job that is very familiar to Levi and with limited responsibilities. More information is needed through CBA.

List 3 new things you learned about the individual through this observation:

1. Levi is very social and is energized through his friendships at work
2. Levi is willing to engage in work he doesn't enjoy when he is surrounded by people he enjoys.
3. There was a strong interest in video games and this group plays Fortnite on the weekends.

Observer's additional comments:

Levi seems fully embedded in this work culture and enjoys his co-workers. He does not enjoy the actual tasks and when he talked to his co-workers about his vocational dreams, he talked about working at the zoo and a movie theater.

Completed by: _____ (print) Date: _____

Exercise 3

Career Research

Name: LeviTABS ID #: 12345

COMMUNITY-BASED EXPERIENCES /

SITUATIONAL ASSESSMENTS

PURPOSE: To collect information about an individual’s practical work performance by simulating a work environment at a location in the community that exposes them to realistic expectations in career areas they may enjoy. Supporting, observing, and assessing an individual participating in work activities in the community will allow individualized and objective evaluation of their interests, skills, and abilities. This will identify an individual’s motivators, learning style, and areas of support needs. Overall work performance depends on proficiency in multiple areas including, but not limited to; physical ability/stamina, academic ability, interpersonal/social skills, communication skills, problem solving, stress management, safety skills, and response to supervision, instruction, and support. The information collected can be directly related to the support the individual will benefit from to succeed in employment.

INSTRUCTIONS: Directly support, observe, and assess the individual participating in work activity in the community in at least two different locations, participating in at least two different types of work activity. This work activity should coincide with the career areas the individual is interested in.

Experiences/Situational Assessments cannot take place at the same locations as Observations. Complete a “Community-Based Experiences/Situational Assessment Worksheet” for each Situational Assessment. Additional comments may be included separately if needed. Label additional comments with specific page and question numbers.

Additional Situational Assessment(s) may be requested by the ETP Supervisor.

Each thorough assessment requires **12-20 Hours**; recommended total assessment time is **24-40 Hours**.

Name: Levi

TABS ID #: 12345

**COMMUNITY-BASED EXPERIENCES /
SITUATIONAL ASSESSMENT WORKSHEET**

Refer to Instructions. Use one Worksheet for each Assessment - 2 are required

Name / Address of Location: Watertown Zoo

Type of Business: (Examples: Retail, Food Service) Zoo

of Days: 20 # of Weeks: 5 # of Hours/Day: 3 Total # of Hours 60

Weekly Community-Based Experience/ Situational Assessment Schedule:

M & TH 9a-12p Preparing meals for animals, cleaning small habitats, Tu-W, 9a-12p Ticket office

TASKS ASSIGNED TO THE INDIVIDUAL /TYPE OF WORK COMPLETED	Liked or Disliked Task (L or D)	Accuracy of Completed Work (1-5) (5=most accurate)	Work Pace (1-5) (5=fastest)	Type(s) of Support (verbal, written, visual, modeling, hand over hand, other)	Level of Support (Independent, occasional, intermittent, continuous)
1. Prepare water bowls	L	5	4	VER/M	O
2. Cleaned a chopped large quantities of vegetables	L	5	4	VER/M	O
3. Cleaned small animal habitats	D	4	4	VER	Int
4. Customer services to people visiting the zoo	L	3	2	VER/W/Ot	Int/C
5. Scanned membership cards	L	5	5	VER	O/Ind
6. Operated cash register	L	2	2	VER/Ot	C

Note: Levi didn't like cleaning the habitats, however, did task willingly and expressed the importance of a clean-living environment.

Name: Levi

TABS ID #: 12345

Select all vocational skill areas in which the individual was provided with any support:

- | | |
|---|--|
| <input type="checkbox"/> Hygiene / Grooming / Dress | <input type="checkbox"/> Following multiple steps |
| <input type="checkbox"/> Productivity / Work pace | <input type="checkbox"/> Time management |
| <input type="checkbox"/> Learning tasks | <input type="checkbox"/> Taking initiative |
| <input type="checkbox"/> Accuracy of completed work | <input type="checkbox"/> Adapting to distraction / Attention to task |
| <input type="checkbox"/> Professional interactions | <input type="checkbox"/> Adapting to changes in routine |
| <input type="checkbox"/> Following instructions | <input type="checkbox"/> Physical / Mental stamina |
| <input type="checkbox"/> Physical strength / agility / mobility | <input type="checkbox"/> Troubleshooting problems / asking for help |
| <input type="checkbox"/> Social interaction | <input type="checkbox"/> Communication (expressive / receptive) |
| <input type="checkbox"/> Managing stress / mental health | <input type="checkbox"/> Responding to feedback / Accepting support |
| <input type="checkbox"/> Professional workplace behavior | <input type="checkbox"/> Other: _____ |

List the areas where the individual needed the most support and describe the support that was provided:

- Levi was groomed and had good hygiene. On the days he worked in the ticket office, he wore clean khaki pants and red tee-shirt, which was the uniform. When working in the habitats, he wore a grungy version of the khaki pants and red tee-shirt. His mother supervised his grooming and hygiene.
- Levi is easily distracted by people around him, especially if he's energized by the discussion. Enjoys talking about things that interest him, and often loses focus on the tasks he needs to be attending to because he's enthralled with the conversation. Redirected and role-played reading body language.
- Needs coaching on time management and following multiple steps. Used a task analysis when cleaning the habitats, which helped him connect steps in logical order. Levi wanted to clean the way he does at his home.
- Productivity required verbal prompts to stay on task and keep moving/working. Improved with time, practice, and repetition.
- When Levi is unsure of next step, he will skip steps; needs reinforcement and reminders to ask for help and direction.

Did the individual dress and groom to meet the expectations of the assessment site?

- Yes No

If No, what were the areas for improvement?

Did the individual keep conversation topics appropriate for a work environment?

- Yes No

Provide examples of the individual's conversation topics:

Levi enjoys talking about topics interesting to him, however if he's not interested, he will simply walk away.

Name: LeviTABS ID #: 12345

Did the individual arrive on time and ready to work at the start of each shift?

 Yes No

If No, why?

Did the individual respond professionally to changes in routine or assigned tasks?

 Yes No

Describe how the individual responded to changes in routine or assigned tasks:

Levi regulated his emotions well when asked to do something outside of his typical assignments, but when asked, he would abruptly stop what he was doing when he could or should have finished up his task. For example, he was filling water bowls when requested to help bring in some boxes and just walked away from running water.

Did the individual understand and respond professionally to requests from the site supervisor?

 Yes No N/A

Requests from co-workers and/or customers?

 Yes No N/A

Requests from vocational support staff?

 Yes No N/A

Describe how the individual responded to requests from others:

Levi was never rude or disrespectful, when asked a difficult question, if he didn't know the answer, he would respond that he didn't know, but would not seek assistance. As he always had a VSP and a zoo staff present, this was not a major problem, but he will require coaching and natural support with how to handle questions to achieve independence.

Did the individual interact professionally with the supervisor, co-workers, customers, and staff?

 Yes No

Describe the individual's interactions with others:

Levi enjoys talking about things that are interesting to him, and he's very interested in activities of the zoo, especially things that connect with the animals. He does not show interest in other people's lives, such as children or spouses. When topics were of a friendly nature, but not interesting to him, he would walk away.

Were any accommodations used to support the individual's communication with others?

 Yes No

If Yes, describe the accommodations that were used and the support that was provided:

Practiced through role play how to carry on a conversation and read body cues. Also used modeling and verbal prompting. Levi does not hold eye contact when communicating with others, although his body is always facing the person when he talks. This did not appear to upset others or discourage communication. His co-workers seemed to want to find ways to make connections.

Name: LeviTABS ID #: 12345

Describe accommodations or support provided due to physical limitations that enabled the individual to carry out the tasks they were assigned:

Did not have trouble with physical requirements assigned to him, but zoo staff seemed to take on the heavy lifting.

If the individual demonstrated any money, reading, writing, math, or computer skills, list and describe how they demonstrated them:

When working in the ticket office, Levi struggled with handling money and making change. He was accurate counting out money, but very slow; this seemed to hold up the line. He used the computer when checking people out by scanning their membership card and was adequate with navigating the program. Used a task list when preparing the food bowls for the animals but responds faster to picture cues.

Describe environmental factors that impacted the individual's vocational performance:

Levi was not impacted by weather or temperature. He didn't like the smell of the habitats and would comment, but it didn't seem to deter him from doing a good job.

What other skills, supports, or preparation might the individual need to be successful in the assessed career field?

Levi will require a higher level of support when engaging with customers and handling money. He made marked improvements over time and learned through repetition. Will need ongoing support in asking questions and transitioning tasks.

List 3 new things you learned about the individual through this assessment:

1. Levi works best when working with others on a common goals.
2. Levi is very knowledgeable about reptiles and other small animals and interested in all animals.
3. Levi is motivated by interesting work. He did not talk about work as a means of making money.

Assessor's additional comments:

Levi enjoyed his CBA at the zoo. He commented this was the only job he wanted to do.

Completed by: _____ (print)

Date: _____



Name: Levi

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5. DISCOVERY REPORT FINDINGS

PURPOSE: To summarize the findings relevant to employment that were gathered during Discovery. This will consolidate information about the individual's strengths and support needs in a variety of vocational areas. Environmental preferences, transportation, work availability, supervision needs, and career options will also be identified in this section.

INSTRUCTIONS: Analyze the information gathered during Discovery and synthesize it into a summary that relates the findings back to vocational situations. Fill in all parts of the Discovery Report Findings Worksheet and refer to this information while completing the Career Research section.

A thorough summary of ETP Discovery Report Findings takes **1-2 Hours**.

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DISCOVERY REPORT FINDINGS WORKSHEET

Comment on strengths and support needs in each area below:

Physical / Medical / Mental Health / Stress Management:

Strengths: *No physical limitations. Levi takes medication in the morning and would not need to take at work.*

Support Needs: *None noted.*

Communication and Social Interactions / Relationships:

Strengths: *Is friendly and likes to meet new people who share common interests. Easily remembers names.*

Support Needs: *Uneasy with maintaining eye contact, which may be caused by ASD. Role play and verbal reminders to face speaker is needed. Levi needs coaching on entering and exiting a conversation.*

Focus / Attention to task:

Strengths: *When he understands his role and the job expectations, he maintains focus and task persistence. Does well with routinized and predictable work.*

Support Needs: *In the beginning of learning a new job, requires intensive coaching to understand how one task connects to the next task. Learns routine through a task list and repetition.*

Productivity / Work Pace:

Strengths: *Work pace is moderate. Responds best when the expectation is quality over quantity.*

Support Needs: *Becomes anxious and impulsive when work productivity is quantified, for example, process X# of customers in a period of time. At one point Levi was having trouble counting change for a difficult customer and was going to give the customer the change amount requested as opposed to what the register indicated.*

Name: LeviTABS ID #: 12345**Safety / Environmental Awareness:**

Strengths: Is conscientious of safety, such as hot vs. cold, sharp items, chemicals, traffic safety.

Support Needs: Needs intensive coaching in new environments and new tasks. Does not always question or understand safety expectations that have not been taught. i.e., wanted to use a large butcher knife to dice vegetables.

Personal Grooming /Hygiene:

Strengths: Always well-groomed and showered.

Support Needs: Levi's mother and father support him in his appearance and dress.

Initiative / Motivation to Work:

Strengths: Is most motivated when he enjoys task and when he is working as part of team.

Support Needs: Sometime needs verbal prompting to finish a task before moving to next. Prompting should be indirect verbal prompts and not direct verbal to teach him to anticipate next action.

Other (specify): Maintaining boundaries

Strengths: Eger to work with others who have shared interests. Like to be helpful and informative.

Support Needs: May abruptly stop his own task responsibilities to assist others and becomes distracted. Is preoccupied by conversations about animals and their care .

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Environmental Preferences:

- Outdoor Work
- Social Work Culture
- Consistent Tasks
- Limited Tasks
- Limited customer interaction
- Other (specify): Supportive supervisor
- Physical Work
- Limited Distractions
- Variety of Tasks
- Independent Work
- Co-workers able to redirect
- Sedentary Work
- Quiet Environment
- Routine Work Schedule
- Team Oriented Work
- Flexible Supervisor

What types of job duties and environments should be **avoided**?

Duties: *Direct customer service with money, expectation of being an independent problem-solver*

Environments: *If up-beat music is playing, disorganized settings, where horseplay happens*

Transportation and Work Availability:

Select the transportation resources available to the individual:

- Drives own vehicle
- Public transportation
- Walks / Rides bike
- Taxi / Ambulatory transportation contractor
- Family / Residential staff transportation
- Other (specify): _____

Describe any training or support the individual will need to become independent with transportation:

Able to take public transportation but will require specific training on route to work. Working on NYSDL, but this appears to be a lengthy process.

How many hours does the individual want to work each week? 20

Fill in the weekly calendar below with the individual's specific days and times available to work:

Days	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
Times	8:00a-8:00p	8:00a-8:00p	8:00a-8:00p	8:00a-8:00p	8:00a-8:00p	8:00a-5:00p	8:00a-5:00p

Name: Levi

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Supervision Needs:

On worksite

1:1 Same area as supervisor X Independent for up to 2 hours.

Needs to be able to seek supervision, could work ind. for 1 hour when he knows tasks. No community restrictions

Comment on the individual's attendance, punctuality, and cooperation:

Attendance was very perfect during CBA, although his mother dropped him off and this may not be possible when he gets a job. Is generally cooperative but needs more coaching and encouragement when learning new tasks. When he anxious about learning new tasks can become resistant and argumentative.

Identified Career Options:

Select up to 4 O*Net Careers - 2 based on the Discovery Report Findings and 2 based on the individual's expressed career preferences.

- | | |
|--|--|
| <input type="checkbox"/> Cashiers | <input type="checkbox"/> Janitors and Maintenance |
| <input type="checkbox"/> Cleaners of Vehicles and Equipment | <input type="checkbox"/> Maids and Housekeeping Cleaners |
| <input type="checkbox"/> Combined Food Preparation / Fast Food | <input type="checkbox"/> Mail Clerks and Mail Machine Operators |
| Customer Service Representation | <input type="checkbox"/> Non-Farm Animal Caretakers |
| Data Entry Keyboarders | Office Clerks |
| Dining Room and Cafeteria Cleaners | Retail Sales Associate |
| Dishwashers | Shipping and Receiving Clerk |
| Food Preparation Worker | <input type="checkbox"/> Stock Associate |
| Food Service Non-Restaurant | Teacher's / Classroom Assistant |
| <input type="checkbox"/> Helpers for Production Workers | <input type="checkbox"/> Ushers, Lobby Attendants, and Ticket Takers |
| <input type="checkbox"/> Other (specify): <u>Farm animal caretaker</u> | |

Additional Comments:

Has never had a paid job. Did well in CBW and SA. Very motivated to work and strong family support. Levi showed progress throughout Discovery and seemed to become more self-aware throughout his experience.

Completed by: _____ (print)

Date: _____

Name: LeviTABS ID #: 12345

6. CAREER RESEARCH

PURPOSE: To compare the individual's skills and abilities with the duties and requirements of specific job titles. This will help determine if these job titles are a realistic match for the individual.

INSTRUCTIONS: Refer to the Identified Career Options on page 34. Use ONETonline.org to research each career. Fill in one chart in the Career Research Worksheet for each career. Combine the Discovery Report Findings and Career Research to provide a recommendation that will support the individual with meeting their career and vocational goals.

Career Research should be completed with the individual.

Thorough Career Research takes **1 Hour per Career**; recommended total research time is **4-6 Hours**.

HOW TO USE O*NET ONLINE:

- Open your internet browser and enter "onetonline.org" into the address bar.
- Enter the career in the "Occupation Quick Search:" field in the upper right corner of the O*NET Online Home Page and hit Enter or click on the arrow.
- Select and click on the most appropriate O*NET Career from the search results.
- Expand all categories on the Summary tab of the O*NET Career page by clicking on the "+" under each category heading. There are 13 categories that can be expanded. If a category is showing all possible results, the "+" will be light grey and unclickable.
- (Optional) Print out the page with all categories expanded for reference.

HOW TO USE O*NET ONLINE INFORMATION TO FILL IN CHARTS:

- Enter one Identified Career Option in each chart and select if it is an expressed preference of the individual or was derived from the Discovery Report Findings
- Enter one job title from the "Sample of reported job titles:" area of the O*NET Career page.
- Enter the O*NET Code. Example: "15-1199.11" for Video Game Designers.
- Select 4-6 of the most important functions or requirements of the O*NET Career and enter them under the "Job Duties / Requirements" column.
- Fill in the information under the "How does the job duty match the individual's skills and abilities?" corresponding to each function in the "Job Duties / Requirements" column.



Name: Levi

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CAREER RESEARCH WORKSHEET

O*NET Career: [G1] Non-farm animal caretaker <input type="checkbox"/> Preference <input type="checkbox"/> Findings	
Job Title:	O*NET Code:
Job Duties / Requirements	How does the job duty / responsibility match the individual's skills and abilities?

O*NET Career: [G2] Stock associate <input type="checkbox"/> Preference <input type="checkbox"/> Findings	
Job Title:	O*NET Code:
Job Duties / Requirements	How does the job duty / responsibility match the individual's skills and abilities?



EMPLOYMENT TRAINING PROGRAM DISCOVERY REPORT

Name: Levi

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O*NET Career: [G3] Usher, Lobby attendants, and ticket taker		<input type="checkbox"/> Preference <input type="checkbox"/> Findings
Job Title:	O*NET Code:	
Job Duties / Requirements	How does the job duty / responsibility match the individual's skills and abilities?	

O*NET Career: [G4] Farm animal caretaker		<input type="checkbox"/> Preference <input type="checkbox"/> Findings
Job Title:	O*NET Code:	
Job Duties / Requirements	How does the job duty / responsibility match the individual's skills and abilities?	

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7. RECOMMENDATION

PURPOSE: To provide a recommendation of the next steps the individual may need to make vocational progress. The recommendation must consider key information discovered and recorded about the individual in all sections of the Discovery Report. The ETP Supervisor requires a complete justification for approval.

INSTRUCTIONS: Choose one of the two options below and complete the corresponding section if applicable. The ETP Supervisor will review the ETP Discovery Report, provide feedback, and notify the SEMP Agency if additional situational assessments or other revisions to the report are needed.

The individual is NOT recommended for Job Development for competitive employment in the community.

If the ETP Supervisor agrees with the recommendation that the individual is not ready for Job Development, they may request a Vocational Development Plan and a Circle of Support meeting to help develop the next steps for the individual.

OR

The individual is recommended for Job Development for competitive employment in the community.

I am recommending the following 2 careers **as determined by Career Research and approved by the individual.** If Identified Career Options do not match the individual's preferences, I have discussed this with the individual. Date of Meeting: _____

1. _____

2. _____

If the ETP Supervisor agrees with the recommendation of Job Development, they will request a Job Development Plan prior to approval.

Do not begin ETP Job Development without the written approval of an ETP Supervisor.



Name: Levi

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REVIEW AND APPROVAL

ETP Discovery Report Completed by:

Name: _____ Title: _____

Email: _____ Phone: _____

Signature: _____ Date: _____

The following section is to be completed by the SEMP / Employment Services Manager

By signing below, I certify that I have reviewed this ETP Discovery Report for content, quality, and accuracy and agree with the recommendations made within.

Name: _____ Title: _____

Email: _____ Phone: _____

Signature: _____ Date: _____

The following section is to be completed by the ETP Supervisor

Date ETP Discovery Report received: _____

Date Job Development Plan received: _____

Approved for Job Development:

Yes No

Date SEMP Agency notified in writing: _____

Signature: _____ Date: _____

Additional Comments:

