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Federal Regulations

- [34 CFR 361.45](#) - Development of the IPE
- [34 CFR 361.46](#) - Content of the IPE
- [34 CFR 361.5](#) - Definitions

CHAPTER 5 – VOCATIONAL PLANNING

510 COMPREHENSIVE ASSESSMENT

510.1 Assessment and Vocational Planning

- Prior to IPE development, the counselor will assess the client’s vocational rehabilitation needs. The purpose of this assessment is to determine the employment outcome, and the nature and scope of vocational rehabilitation services to be included in the IPE.
- The IPE must be designed to achieve a specific employment outcome that is selected by the individual consistent with the individual's unique strengths, resources, priorities, concerns, abilities, capabilities, interests, and informed choice.
- The comprehensive assessment of rehabilitation needs will include information provided by the client, and information obtained in determining the client’s eligibility.
- The following factors should be documented in the case file if they affect the vocational rehabilitation needs of the client:
 - Personality
 - Career interests
 - Interpersonal skills

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- Intelligence and related functional capacities
 - Educational achievements
 - Work experience
 - Vocational aptitudes
 - Personal and social adjustments
 - Employment opportunities
 - Medical
 - Psychiatric/psychological
 - Other pertinent vocational, educational, cultural, social, recreational and environmental factors
- The comprehensive assessment of vocational rehabilitation needs should also include an appraisal of the client's patterns of work behavior and services needed for the client to acquire and/or develop:
 - Occupational skills
 - Work tolerance, habits and attitudes, and
 - Social behavior patterns necessary for successful job performance.
- In providing quality customer service, contact with the client should be regular and ongoing.
 - During the vocational planning process, assist the client in making an informed choice regarding his/her vocational goal by:
 - Determining there is reasonable expectation the client can secure employment
 - Providing the client with current labor market information
 - Assessing the client's financial resources/financial eligibility
 - Reviewing and discussing cost-effective programs/services.
 - Considering available comparable benefits/services
 - Determining accommodations required, if any
 - Determining assistive technology or assistive technology services
 - Discussing services to be provided
 - Explaining client and counselor responsibilities

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520 INDIVIDUALIZED PLAN FOR EMPLOYMENT (IPE)

520.1 IPE Development

- The Individualized Plan for Employment (IPE) is a written document which outlines a plan to achieve the client’s chosen vocational goal and is developed through an assessment of the client’s individual rehabilitation needs consistent with his/her unique strengths, resources, abilities and interests.
- Following the determination of eligibility, and upon establishment of an individual’s vocational goal, development of the IPE should occur. Staff should act with a sense of urgency in working with the client to complete this process.
- In developing the IPE, clients have the opportunity to exercise informed choice when selecting:
 - The employment outcome/employment setting
 - The specific VR services needed to achieve the employment outcome
 - The entity(ies) that will provide the VR services, and
 - The methods available for procuring the services
- In discussing the nature and scope of VR services to be provided in developing the IPE, meet with the client to review and discuss the following:
 - Financial resources and eligibility
 - Comparable services
 - Cost-effective programs/services
 - Vocational goal and current labor market information
 - Accommodations required, if any
 - Services to be provided
 - Client and counselor responsibilities
 - Client’s rights to due process hearing and/or mediation.
- Include, as appropriate, the provision of assistive technology devices, assistive technology services, and personal assistance services, including training in the management of those services.
- The IPE will be jointly developed, agreed upon and signed by the counselor and the client and/or his/her representative. The client/representative has the right to develop his/her own IPE, however the vocational goal and services must be mutually agreed upon. Client should be informed of his/her

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rights to due process hearing and/or mediation if the counselor cannot support the client's informed choice.

- In those situations when the counselor cannot support the client's informed choice, the following action should be taken:
 - Document why the client's choice is not supported.
 - Explore alternative opportunities/options with the client.
 - Provide the client with information regarding his/her appeal and mediation rights as well as the availability of the Client Assistance Program.
- The client may also initial any IPE related "responsibility addendums" to verify his/her responsibilities associated with the plan for services have been reviewed.
- The District Supervisor (or Counselor II and above as designated by the District Supervisor) will review and approve all initial plans. Assistant Supervisor and Counselor IV may be exempt from these reviews.
- The District Supervisor (or Counselor II and above as designated by the District Supervisor) will review and approve all individual item purchases with a cost greater than or equal to \$3000.00. The review process must occur prior to purchase. The District Supervisor (or Counselor II and above as designated by the District Supervisor) will document the approval by issuing the authorization for the purchase.
- To determine reasonableness, the following will be considered during the approval process:
 - Is the vocational goal consistent with the individual's functional limitations, abilities and interests?
 - Are these the essential services/products needed to reach the vocational objective?
 - Have lower cost/comparable services been considered and documented?
Examples: Cost effective measures have been utilized. Multiple bids obtained, as appropriate.
 - Is there a reasonable expectation that a successful employment outcome will be achieved after services are completed?

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- A copy of the IPE, addendums, and any authorizations for service that are completed in accordance with the IPE, will be provided to the client and service providers/designated school district personnel, if appropriate.
- Development of an IPE for a client currently receiving special education services in the secondary school system:
 - must be consistent with the goals, objectives and services identified in the student's Individualized Education Program (IEP), and
 - should be developed prior to the student's graduation/exit from the secondary school system, whenever possible, or
 - when an IPE has not been developed, the counselor should document the reason in a case note.
- The IPE must be reviewed at least annually, or more often if specified or determined necessary, by the counselor and client or his/her representative, to assess the client's progress in achieving the identified employment outcome.

520.2 Amended IPE

- The IPE is amended, as necessary, by the individual or, as appropriate, the individual's representative, in collaboration with the counselor, if there are substantive changes in:
 - the employment outcome
 - the vocational rehabilitation services to be provided
 - the providers of the vocational rehabilitation services
- Amendments to the IPE do not take effect until agreed to and signed by the eligible individual or, as appropriate, the individual's representative and by the counselor.

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530 TICKET TO WORK

Related Websites

www.socialsecurity.gov/work

www.yourtickettowork.com

Missouri Vocational Rehabilitation (MVR) utilizes the Cost Reimbursement system with our clients who are Social Security beneficiaries/recipients who meet the appropriate criteria when successfully closed. A client's signing of their Individualized Plan for Employment (IPE) also assigns their Ticket to Vocational Rehabilitation.

If a client decides to reassign their Ticket to an Employment Network (EN) other than MVR prior to the closure of their VR case, VR services must be discontinued at the time of reassignment.

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540 HOMEMAKER / UNPAID FAMILY WORKER

- Per Federal Regulation (effective 9-19-2016 cited below), any new Individualized Plan for Employment may not have an uncompensated employment goal (such as homemaker or unpaid family worker).

34 CFR Part 361.5 (15) Employment outcome means, with respect to an individual, entering, advancing in, or retaining full-time or, if appropriate, part-time competitive integrated employment, as defined in §361.5(c)(9) (including customized employment, self-employment, telecommuting, or business ownership), or supported employment as defined in §361.5(c)(53), that is consistent with an individual's unique strengths, resources, priorities, concerns, abilities, capabilities, interests, and informed choice.

Note: A designated State unit may continue services to individuals with uncompensated employment goals on their approved individualized plans for employment prior to the effective date of the final regulations until June 30, 2017, unless a longer period of time is required based on the needs of the individual with the disability, as documented in the individual's service record.

(Authority: Sections 7(11), 12(c), 100(a)(2), and 102(b)(4)(A) of the Rehabilitation Act of 1973, as amended; 29 U.S.C. 705(11), 709(c), 720(a)(2), and 722(b)(4)(A))

Informed Choice:

- Explain to the applicant that the purpose of the vocational rehabilitation program is to assist individuals to achieve an employment outcome.
- Provide the applicant with information concerning the availability of employment options, and of vocational rehabilitation services, to assist the individual to achieve an appropriate employment outcome.
- Inform the applicant that, he or she can seek services at a later date if he or she chooses to pursue an employment outcome.

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- If after receiving the above information, the individual with a disability chooses not to seek competitive integrated employment, refer that individual to other Federal, State, or local programs and providers that may meet the individual's needs for related services (e.g., Centers for Independent Living program (CIL) and programs for the aging).
- Provide to the client:
 - A notice of the referral to the agency carrying out the program;
 - Information identifying a specific point of contact within the agency to which the individual is being referred.

540.1 Homemaker – Defined

- ~~Homemaker is recognized as gainful work when the client is the principal homemaker, and the activities are performed on a full time basis.~~
- ~~Homemaker may be an appropriate occupation/vocational goal depending on individual needs and circumstances.~~
- ~~Homemaking is not restricted to individuals who have previously functioned as homemakers.~~
- ~~Services provided by Vocational Rehabilitation must enable the client to perform specific and substantial homemaking functions.~~
- ~~Individuals living alone may be considered homemakers; however, there must be documentation of rehabilitation in homemaking activities.~~
- ~~Individuals living with other family members may be considered homemakers; if the homemaking activities performed allow a family member to be gainfully employed outside of the home.~~

540.2 Homemaker – Activities and Functions

- ~~Meal Preparation: mixing, handling, carrying, peeling, slicing, etc.~~
- ~~Shopping: walking, carrying, lifting, driving, communicating, etc.~~
- ~~Child Care: dressing, bathing, holding, lifting, feeding, chasing, walking~~
- ~~House Cleaning: walking/standing, bending, stooping, reaching, pushing, pulling, lifting~~

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- ~~Dishwashing/Laundry: grasping reaching, lifting, carrying~~
- ~~Budgeting: paying bills, handling money~~

540.3 Homemaker – Guidance

Homemaker: Initial Vocational Goal

- ~~When VR services are being requested for the purpose of assisting the individual to obtain an initial vocational goal of “homemaker”, document the disability and specific functional limitations with regard to performing the activities of homemaking outlined above.~~
- ~~The Eligibility Certification should describe the specific activities the client cannot perform as a result of the limitations imposed by his/her disability.~~
- ~~The comprehensive assessment should explain why vocational rehabilitation services are required to perform these specific homemaking activities (how will VR services help them perform these tasks).~~

Homemaker: Change of Vocational Goal

- ~~When the employment outcome is being changed from the initial vocational goal to “homemaker”, provide documentation explaining why the vocational objective of homemaker is more appropriate at this time.~~
- ~~Document “informed choice” and the client’s participation/agreement in changing the vocational goal.~~
- ~~Identify specific functional limitations with regard to performing the activities of homemaking listed above.~~
- ~~Determine the impact of any services VR has already provided on the client’s ability to perform homemaker activities.~~
- ~~Document the need for additional services to improve the client’s ability to perform homemaking activities.~~
- ~~Prepare an amended IPE to list “Homemaker” as the new job objective with specific services which can be shown to have a positive impact on homemaking activities. If previous services also had a positive impact, the only additional service needed may be counseling and follow-up.~~

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Homemaker: Case Closure

- ~~The counselor must be able to document those substantial services provided that significantly impacted the client's ability to successfully perform homemaker activities for a Closed – Rehabilitated closure.~~
- ~~If additional VR services are not needed, and prior VR services had no impact on the client's ability to perform homemaking activities, the case must be closed Other than Rehabilitated.~~

Unpaid Family Worker – Defined

- ~~An individual who performs one or more specific tasks without actual cash payments on a family farm or business.~~
- ~~The individual must have the personal responsibility for performing one or more assigned tasks or operations necessary to conduct the family business or farm.~~

Unpaid Family Worker – Guidance

Unpaid Family Worker: Initial Vocational Goal

- ~~When VR services are being requested for the purpose of assisting the individual to obtain an initial vocational goal of “unpaid family worker”, document the disability and specific functional limitations with regard to performing the activities of unpaid family worker.~~
- ~~The Eligibility Certification should describe the specific activities the client cannot perform as a result of the limitations imposed by his/her disability.~~
- ~~The comprehensive assessment should explain why the client requires vocational rehabilitation services to attain skills necessary to perform these specific unpaid family worker activities.~~

Unpaid Family Worker: Change of Vocational Goal

- ~~When the employment outcome is being changed from the initial vocational goal to “unpaid family worker”, provide documentation explaining why the vocational objective of family worker is more appropriate at this time.~~
- ~~Document “informed choice” and the client's participation/agreement in changing the vocational goal.~~

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- ~~Determine whether or not the client can perform the duties of the particular job in the family operated business or family farm.~~
- ~~Document the impact of previously provided services on the client's ability to perform required activities.~~
- ~~Determine need for additional services directed at improving the client's performance as unpaid family worker.~~
- ~~Amend the IPE to list "Unpaid Family Worker" as the new job objective with specific services which can be shown to have a positive impact on the duties of an unpaid family worker. If previous services also had a positive impact, the only additional service needed may be guidance and counseling and follow-up.~~

~~Unpaid Family Worker: Case Closure~~

- ~~In order to close an "unpaid family worker" case as Closed – Rehabilitated, the case file must contain documentation that:~~
 - ~~Substantial services, including guidance and counseling, were provided and~~
 - ~~The services provided have contributed to, had an effect on or had an impact on the client's ability to perform the work~~
- ~~If no additional services are needed, and prior services had no impact on client's ability to perform tasks, substantial services were not provided and the case must be closed Other than Rehabilitated.~~