



## Customized Employment Delivery Checklist

**Purpose:** To assess the integrity of customized employment (CE) implementation from the perspectives of CE providers’ adherence to contractual obligations, performance expectations and the [Essential Elements of Customized Employment](#). Data from this assessment is intended for use by Vocational Rehabilitation (VR) counselors in determining whether CE services are being delivered by providers as authorized by the VR agency.

**Assumptions:** Individuals (typically VR Counselors) using this protocol have received some level of orientation or training on the CE process, understand the core principles of CE as laid out in the Essential Elements and are familiar with the provider organization’s obligations and performance expectations. Individuals should have access to case records, case management system data, and provider or practitioner contracts/agreements. Documentation for all items on the delivery checklist can be found in the case management record and CE documents for the employment seeker.

### Process:

1. Gain an understanding of the provider’s obligations related to CE delivery.
2. Assemble the necessary records for the stage(s)of the CE process under review (Discovery, Plan, Employment Development Representation).
3. Cross-reference the records’ content with the checklist items.
4. Draw a conclusion, based on the completed checklist, as to whether the provider’s obligations have been met, additional information is needed, or how to proceed otherwise.

Note: The VR agency may establish its own specific protocols and/or policies for this process as well as guidance on how to apply the Checklist results.

### Instructions:

- Complete the sections of the checklist that align with the CE phases that have been completed at the time of review. For example, if the Job Plan is currently being developed, then answer questions through the Discovery section.
- If no mention of an item is found, then the response is ‘No’.
- In each section below if ‘No’ is checked, then provide comments that describe the reason for the rating unless instructions in the section say differently.
- If CE delivery items are not part of the contractual commitment with the service provider, enter N/A in the ‘Yes’ column for Not Applicable.

**Observations or concerns about the provider organization’s ability to support and effectively deliver CE:**

### Employment Seeker CE Delivery Checklist

The employment seeker	Yes	No
Is classified as a person with a Significant Disability (SD) or Most Significant Disability (MSD)?		
Requires more and different job services and supports than provided through traditional job placement services and for a longer duration?		
Has little or no work history or has not experienced employment success?		
Would benefit from the Discovery process and negotiated job duties with employer based on individual strengths and needs of employer?		
Comments:		

#### Discovery

- For interviews (Int.), all interviews with same category are grouped on a single line;
- For observation (Obs.), describe type (typical life activity or novel life activity) and setting;
- If activity (Act.), briefly describe activity between employment seeker and service provider;
- For records review (RR), note types of records sourced and if completed last.

**Discovery Activities** (marked by X) include:

Category	Int.	Obs.	Act.	RR	Number	Length
Employment seeker	X					
Family	X					
Friends	X					
Other natural supporters	X					
Typical life activity		X				
Novel life activity		X				
			X			
				X		
Comments:						

Discovery Activity Effort			
Start Date		End Date	
Total # of Hours		Total # of Weeks	
Comments:			

**Discovery Document** includes:

Elements	Yes	No	Elements	Yes	No
Strengths			Past employment information		
Needs			Education		
Interests			Life activities		
Input from Family			Skills		
Input from Friends			Conditions for success		
Living situation			Vocational themes		
Location in community			Potential contributions		
Transportation analysis					

The tone of the Discovery document: (\* add a Comment if 'Yes' was checked to explain):

Elements	Yes	No
Based on the individuals strengths?		
Comparative comments used?*		
Deficits discussed?*		
Comments:		

The Discovery document was shared with employment seeker (date): \_\_\_\_\_

Elements	Yes	No
Employment seeker approved the sharing of the Discovery Document to relevant parties?		
Comments:		

Elements	Yes	No
A list of potential employers has been identified in the Discovery Report?		
# of Employers _____		
Comments:		

Based on the above findings, the delivery of Customized Employment services relating to Discovery meets VR's expectation? **Yes** \_\_\_\_\_ **No** \_\_\_\_\_

**If No, summary of additional documentation or action required:**

**Job Search Plan**

**Job Search planning meeting** was scheduled 2-4 weeks following Discovery (date): \_\_\_\_\_

The planning meeting documentation includes the following elements:

<b>Elements</b>	<b>Yes</b>	<b>No</b>
All aspects of the planning meeting were decided on with the direct approval of the employment seeker (assistance may be provided)?		
Planning meeting was facilitated by someone who participated in the Discovery process?		
All planning meeting attendees are individuals who know the employment seeker?		
If person without relationship with employment seeker was present, permission was given by employment seeker/family (enter NA under Yes if not applicable)?		
With permission of employment seeker, copies of the Discovery Document were provided to meeting attendees?		
The job development/employment specialist involved in the Discovery process was present?		
At least as many individuals were invited to the planning meeting who are not paid to attend as those who were paid to attend?		
Recap of employment seeker strengths, needs, and interests/vocational themes as identified in the Discovery process was provided in the meeting?		
A list of job tasks or interests/vocational themes that fit the employment seeker was generated in the planning meeting?		
A list of specific employers was generated consistent with the employment seeker's strengths, needs, and interests/vocational themes identified in the Discovery process?		
<b>Number of employers:</b> _____		
<b>Comments:</b>		

**Job Search Plan** contains the following elements:

Elements	Yes	No
The final plan reflects the wishes of the employment seeker rather than job openings or existing relationships held by employment specialists?		
Plan includes the following in employer language:		
- Skills		
- Tasks		
- Interests		
- Vocational themes		
- Potential contributions		
- Conditions for success		
A prioritized list of specific employers consistent with employment seeker's interests?		
Copy of final plan provided to employment seeker and funding agency?		
Comments:		

Employment seeker approved the plan for customizing employment (date): \_\_\_\_\_

Based on the above findings, the delivery of Customized Employment services relating to the Job Search Plan meets VR's expectations? **Yes**                      **No**

**If No**, summary of additional documentation or action required:

Other comments:

## Employment Development Representation and Negotiation

Elements	Yes	No
The primary customer during Employment Development Representation was the employment seeker?		
Employment specialist and employment seeker together determined the essential features of employment?		
- Ideal features		
- Non-negotiables		
- Willingness to negotiate ideal features		
- Connect ideals to employment seeker strengths, needs, and interests		
Initial presentation introducing customized employment to potential employers was prepared and practiced?		
Potential employers were approached for informational interviews or formal presentations on customized employment (preferred minimum is 4-5)?  Number of employers: _____		
Potential employers were assisted in identifying specific, unmet business needs that relate to employment seeker's strengths, interests, and needs?		
An informational approach was used with potential employers rather than persuasion?		
Customized job description was developed with the employer with input from the employment seeker?		
Permission was asked from employment seeker to disclose personal factors relevant to the job negotiation?		
Support plan negotiated with employers as part of job negotiation?		
Comments:		

After the job negotiation was complete, the final job was compared to the job search plan?

Elements	Yes	No
Negotiated job placement reflects the job search plan?		
Comments:		

<p>Based on the above findings, the delivery of Customized Employment services relating to Employment Development Representation meets VR's expectations.      <b>Yes</b>      <b>No</b></p> <p><b>If No</b>, summary of additional documentation or action required:</p>   <p>Other comments:</p>
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