



*Idaho Division of  
Vocational Rehabilitation*

Community Rehabilitation Programs Manual –  
January 2019

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## Introduction

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The purpose of this manual is to provide Community Rehabilitation Programs (CRPs) with information on services and billing procedures that will help a CRP work with Idaho Division of Vocational Rehabilitation (IDVR). The manual is intended to serve as a living document which will be updated over time, as needed.

IDVR has the authority to receive and expend vocational rehabilitation (VR) funds under the Rehabilitation Act of 1973, as amended, 34 CFR §§ 361.21 and 361.22, and 34 CFR § 363. IDVR works with CRPs to provide services, as defined in this manual to IDVR customers.

CRPs provide specific services for customers based on a fee-for-service or through a specific invitation to bid on a Request for Proposal (RFP). Idaho CRPs must be accredited by either the Commission on Accreditation of Rehabilitation Facilities (CARF) or the Rehabilitation Services Accreditation System (RSAS), follow the process and procedures mentioned in this manual and undergo periodic monitoring by IDVR to continue a working relationship with the Division.

This manual addresses the Idaho Division of Vocational Rehabilitation's state-federal program. The Extended Employment Services (EES) program is a separate, exclusively state-funded entity and is not referenced in this document. For EES program requirements, please contact the EES program.

### IDVR's CRP Resources Portal:

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IDVR's Planning and Evaluation unit has established a public facing portal to host this and other relevant documents for CRPs. The portal can be found at the following web address:

[https://vr.idaho.gov/unlisted/CRP\\_Resources](https://vr.idaho.gov/unlisted/CRP_Resources)

## Section 1: IDVR CRP Service Billing Criteria and Process

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### **1.0 CRP Billing Protocol**

- For the purposes of this section an Authorization for Purchase (AFP) is an authorization issued by IDVR for the purchase of CRP services. This is commonly referred to as an 'auth', or an authorization.
- All CRP services must have a written authorization prior to service delivery: All authorizations must state the type of service, quantity of service, rate of payment and date(s) of service allowable. Invoices which omit these requirements may not be processed by IDVR.
- The CRP will bill IDVR once a month for each service authorized. A separate invoice for each authorization should be provided. All invoices must include supporting documentation (an activity log), which would also include a description, duration, and dates that services were provided. The CRP should submit an invoice for each authorized service provided during the month.
- At a minimum, all CRP billings should be submitted by the last calendar day of the month following the provision of service (e.g. billing for services provided June 17<sup>th</sup> must be received by July 31<sup>st</sup>).
- Invoices should arrive at IDVR in chronological order (e.g. June's invoice is received before July's and is in sequence).
- If a CRP needs to submit an invoice for a service period past the 30-day protocol or needs to send IDVR a new invoice for additional unbilled hours, they must do so through their management staff. The invoice must then be sent to the appropriate IDVR Regional Manager for their consideration. Failure to submit these types of billings through the CRP's management staff and to the appropriate RM may cause a delay in payment processing.
- As stated in Idaho Statute 67-2302, IDVR has 60 calendar days from the day the agency receives the invoice to make payment to the vendor. The 60-day window starts on the business day IDVR receives the invoice. Due to the volume of billings IDVR must process,

inquiries about submitted invoices should not be made until a 60-day window has elapsed.

- For hourly service billing: When one CRP staff member is serving multiple customers at the same time, the CRP must ensure that the time billed reflects actual staff time and is appropriately distributed across all customers. (e.g. One job coach provides services to multiple customers in the same billable hour, and the invoices reflect this division of the job coach's time by customer). Billing cannot exceed the actual time spent with the customer and/or employer.
- All hourly billing should be submitted using .25-hour (15 minute) increments.

An exception to end of month billing occurs when a case is due to be closed by IDVR. In these cases, the VR Counselor (VRC) or VR Assistant (VRA) will contact the CRP to obtain a report and final bill within five business days of the request.

- A business day, as defined by IDVR, is any day in which IDVR offices are open for service. This usually consists of weekdays Monday through Friday unless a recognized State of Idaho holiday or a declared emergency occurs during one of these days. If one of these holidays occurs on a Saturday, the State of Idaho will observe the day on the preceding Friday. If the holiday occurs on a Sunday, the observance will occur on the following Monday.

### **1.1 Mandatory Criteria for Invoice Submission**

All CRP invoices for authorized services must include a corresponding written report or case log and:

- Include each service delivery date and AFP (authorization) number
- Detail the number of hours billed for each service
- A description of service(s)
- Include the name of the customer
- A correct billing address which matches the W9 filed in IDVR's vendor list

If an invoice was submitted in a timely manner but requires correction, the VRA will initiate a correction request with the CRP. The CRP should respond to this correction request within 10 business days.

## **1.2 CRP Staffing Process for New Referrals**

The VR counselor will provide the CRP with referral information at the time of the referral. The CRP may initiate an initial staffing (sometimes referred to as intake) following the receipt of the referral information and an approved written authorization from IDVR. A complete referral form will contain a customer's application data, and eligibility information from IDVR's case management system. (Appendix A, example to be added in 2018). A release of information will be included in the referral information.

The CRP is responsible for reviewing the referral information prior to the initial staffing with the customer. This process should help ensure CRP staff are reviewing all relevant information contained in the referral and accelerate the process. In the event a referral form is incomplete, the CRP should request additional information from the VRA or VR counselor. If the VRA or counselor is unavailable or not responsive, the CRP should request this information from the Regional Manager.

To ensure expectations are aligned between IDVR, the CRP, and the customer, the VR counselor will hold an initial staffing prior to the provision of CRP services. In the event this staffing cannot occur at IDVR, the counselor may elect to join the meeting via phone. The counselor will verify that the time billed for initial staffing does not exceed the actual time spent.

CRP staffing services shall not exceed one hour. If there is the expectation that, due to unique customer need, the initial staffing will exceed one hour, pre-approval for an exception must be granted by the VR counselor. **Initial staffing should be billed as an Assessment: Staffing service.** (Formerly known as: CRP Staffing).

## **1.3 Additional Staffing**

An additional staffing may be indicated when expectations between IDVR, the CRP and the customer are out of alignment, or where team problem solving is required. Additional staffing should also occur regularly when

customers are making the transition from Pre-ETS to traditional CRP services. Following authorization by the VR counselor, the CRP may bill IDVR for the time spent discussing vocational services. In these cases, the VR counselor should be in attendance, preferably in-person or at least by phone. Additional staffing should be billed as an Assessment: Staffing service if the purpose is evaluative, or under the corresponding service category if a customer is receiving planned services (e.g. additional staffing should be invoiced under 'Job Supports - Short-Term' if the purpose of the staffing was to coordinate service provision/problem solve for that service).

#### **1.4 Report Writing/Ongoing Communication:**

The CRP may bill for the time their staff spends on writing reports and ongoing contact with the customer through e-mail, phone calls and texts. Billing for communication with contacts such as family members, legal guardians or other support team members is allowed if approved by the VR counselor and the communication is vocationally related. The approval and scope of communication for a customer should be determined considering input by the team (based on anticipated customer need) and approved by the VRC at initial staffing. If a CRP believes this scope needs to be modified to address unanticipated customer need, they should contact the VRC and request approval for an expansion of the scope of ongoing communication, explaining what issues are currently being experienced and how this proposed expansion will benefit the customer.

- Note: The CRP should document formal (billed) interactions in the case file.
- Note: The CRP cannot bill for messages left for the customer. Time spent trying to track down customers where contact has been lost is not billable: If there is an ongoing issue reaching the customer, the CRP should contact the VR counselor to resolve the issue. The employment specialist's discretion should be used when determining when to bring customer non-responsiveness to the attention of the VRC, however the Employment Specialist must contact the VRC when multiple attempts have been made and the customer has been out of contact more than one-month.

- Note: The internal communication of CRP staff is not considered billable.

Monthly limits for report writing:

- Assessment: Community-based Work Evaluations: One hour maximum.
- Job Supports - (short-term supports/SE job coaching), and all Job Search Assistance (Job Site Development) services: .75 hour maximum/month.

Billing for report writing should be included with the service delivery category for that service. For example, report writing for SE job coaching should be billed as SE job coaching.

Reports should align with the service category on the authorization. (Note: the services listed on the report or log must match the service listed on the invoice/bill).

#### **1.4.1. Employment Verification**

IDVR is required to maintain appropriate supporting documentation in each customer service record that verifies certain key data elements which are critical for VR program performance. Maintaining appropriate supporting documentation will ensure compliance with 34 CFR §§361.12 and 56 to ensure the proper and efficient administration of the VR program.

At the time of employment, IDVR is required to verify the customer's start date of employment and their weekly earnings. CRPs who provide job related supports which involve interactions with employers are required to obtain employment verification information, including the signature of the employer, using an IDVR 'Employment Verification' form. This form is to be provided to IDVR within five working days of the customer's employment start date. No further verification is required by CRPs as the secondary verification required by RSA will be done by VR staff.

The only allowable exception to requesting employment verification is when a customer, based on their informed choice, does not want to disclose their disability to the employer. If this situation occurs, communication with the

VR counselor is required, as IDVR is still required to obtain other forms of employment verification.

If an employer refuses to verify employment (sign the form), the CRP should complete the elements of the Employment Verification form without the employer signature and notify the VRC/VRA of the employer's signature refusal.

The latest version of the Employment Verification form can be found at:

[https://vr.idaho.gov/unlisted/CRP\\_Resources](https://vr.idaho.gov/unlisted/CRP_Resources)

## **1.5 Travel for Job Search Assistance and CBWEs with the Customer**

### **1.5.1 Travel Time with the Customer for Job Search Assistance**

#### **Activities:**

This service will be billed at .25-hour increments and should be billed under Job Search Assistance. Note: this billing is allowable even within urban/highly served areas for travel *with the customer* for job search assistance activities. Time spent on site with the customer for these activities should also be billed as Job Search Assistance.

### **1.5.2 Travel Time with the Customer for Community Based Work**

#### **Evaluations:**

This service will be billed at .25-hour increments and should be billed under Assessment: CBWE. Note: this billing is allowable even within urban/highly served areas for travel *with the customer* to/from the CBWE site. Time spent on site with the customer for these activities should also be billed as Assessment: CBWE.

## **1.6 Travel to Remote/Underserved Areas:**

Travel costs may be reimbursed for service provision in remote/underserved areas when travel is more than 25 miles from a CRP frontline staff's home base of operations. Remote/underserved areas are those areas lacking access to adequate service provision and are identified at a regional level by Regional Managers (RMs). IDVR may not reimburse these travel costs if the service has taken place in an area not explicitly identified in their region (Appendix B), unless an exception is approved by an RM

prior to the travel taking place. RMs will update CRPs in their region when a new underserved area is identified, or conversely when an area no longer qualifies as remote or underserved.

CRPs may bill VR for travel to these identified destinations, but only when exceeding the 25-mile threshold. CRPs are expected to consolidate rural travel to the greatest extent possible to minimize costs (i.e. meeting with multiple contacts on the same trip). When multiple contacts occur during rural travel, the CRP will proportionally distribute total trip costs across customers served (hours billed cannot exceed actual time spent by CRP staff).

Exceptions to underserved area definition may occur when specialized services are not available in a particular area and will be addressed on a case by case basis. Ultimate approval of these exceptions is made at the discretion of an area's Regional Manager.

Appendix B details the most currently identified rural/underserved areas where travel is approved.

### **1.7 Additional Service Hours:**

A request for additional service hours must be authorized by the VR counselor to be considered billable. To request an approved authorization to continue services, the request must be emailed to the VR counselor and the supporting VRA. The email should include service type and a justification for additional service hours. The CRP must provide a timeframe as to when the current service hours will be fully utilized. CRPs are asked to call and get a hold of the VRC/VRA or if necessary the RM if there is an immediate need for reauthorization to continue fluid service provision.

Additional service hour requests for Supported Employment (SE: Job Coaching) should be accompanied by evidence of progress/fading reports. Additional information on this requirement, including guidance on creating fading reports and fading plans can be found under the SE: Job Coaching service category description later in this document.

### **1.8 No-shows:**

In the event a customer is absent from a scheduled CRP service appointment, the CRP should notify the VRC and VRA via email for each occurrence as soon as possible and include the reason the customer missed the appointment (e.g. illness or customer was unresponsive/the cause is not known). If the customer misses two consecutive appointments the CRP will be required to stop service delivery until the VRC provides written verification as to the next step in CRP service action (i.e. the VRC informs the CRP to continue/discontinue the provision of service). If a CRP has its own internal policy regarding no-shows for a customer to continue receiving services, the CRP must make that policy known to the customer at the time the referral is accepted for service. If customer service is discontinued by the CRP for no-shows per CRP's policy, the CRP should inform VR the same day that the CRP informs the customer. While IDVR does not define the maximum number of no-shows allowed, the VRC will evaluate the continuation of services on a case-by-case basis. VR will provide written direction to the CRP, via email, after each no-show following the second missed CRP appointment.

### **1.9 Discontinuation of Services:**

The CRP will notify the VR counselor in the event a customer notifies the CRP of their intention to discontinue services, or if the customer fails to cooperate (e.g. displays a trend of not following through with planned commitments). The VRC will likewise email the CRP in the event services will be discontinued with the CRP. This could be for any number of reasons such as a case file will be closed, the customer chooses a different service provider, or the customer discontinues services. The reason for discontinuation with the CRP may or may not be shared with the CRP.

### **1.10 Customer Abandonment Prohibited:**

If a CRP operating in multiple regions intends to cease operations in one or more region(s), they should notify IDVR as soon as possible (but no later than 30 days prior to discontinuation of regional operations) for the division to assist customers who will be impacted. Likewise, a CRP who is discontinuing a business relationship with IDVR should provide as much notice as possible to prevent serious disruption to ongoing customer

services. Violations of this customer abandonment provision represent an egregious ethical violation and will trigger an immediate Corrective Action process as outlined in the CRP Monitoring portion of this manual applying to all regions which continue to be served by that CRP. Failure to adequately respond to customer abandonment concerns in the CAP process may result in the suspension of statewide authorizations to the entity in question.

### **1.11 Dispute Resolution:**

IDVR and CRPs agree to resolve disputes that arise during the provision of vocational rehabilitation services, and to ensure that services are not disrupted by using the following process to resolve such interagency disputes:

- Initial attempts should be made to resolve disputes regarding service provision and fiscal issues informally through direct communication with the VRA or VRC/VRS working the case.
- If direct communication with the VRA or VRC/VRS is unsuccessful, CRP staff should contact the IDVR Regional Manager in their area to set up a meeting and resolve the issue.
- If still not resolved, the dispute should be referred to CRP administration and the IDVR Field Services Chief for final resolution.

If IDVR questions an invoice in terms of service delivery, type or quantity, IDVR will work with the CRP to clarify and resolve the question. If an adjustment is necessary due to a violation of IDVR's billing criteria as stated in this section of the CRP manual, the CRP agrees to amend and re-submit the invoice.

## Section 2: CRP Service Definitions

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1. Fee Schedule
2. Services
3. Pre-employment Transition Services (Pre-ETS)
4. Supported Employment (SE)

### **Fee Schedule (as of July 1, 2018)**

<b>Service Class</b>	<b>Rate</b>
<b>Youth Extended Services under IDVR</b>	\$40.00/hour
<b>CE Milestone I: Discovery</b>	\$1,750.00/milestone
<b>CE Milestone II: Employment Plan</b>	\$500.00/milestone
<b>CE Milestone III: CE and Placement</b>	\$2,500.00/milestone
<b>CE Phase IV: Job Coaching/Stabilization</b>	Bill as SE Job Coaching (\$47.80/hour)
<b>Assessment: Vocational Evaluation – In House</b>	\$69.55/day
<b>Other CRP Services</b>	\$47.80/hour

Note: Hourly services should be billed at .25-hour increments

### **2.1 Assessment**

Assessment means services provided and activities performed to determine an individual's eligibility for VR services, to assign an individual to a priority category, and/or to determine the nature and scope of VR services to be included in the IPE. It also includes trial work experiences.

#### **2.1.1 Assessment: Staffing (Staffing)**

To ensure expectations are aligned between IDVR, the CRP and the customer, the VR counselor is required to hold an initial staffing prior to the provision of CRP services. In the event this staffing cannot occur at IDVR, the counselor may opt to join the meeting via phone. The counselor will verify that the time billed for initial staffing matches the actual time spent.

CRP staffing services (including ‘intake’) shall not exceed one hour. If there is the expectation that, due to unique customer need, the initial staffing (intake) will exceed one hour, pre-approval and authorization for an exception must be granted by the VR counselor. Initial staffing should be billed as an Assessment: Staffing service. (Formerly known as: CRP Staffing).

Subsequent staffing may be indicated when expectations between IDVR, the CRP and the customer are out of alignment, or where team problem solving is required. Following approval by the VR counselor, the CRP may bill IDVR for the discussion of vocational services. In these cases, the VR counselor should be in attendance (by phone or in-person). Subsequent staffing should be billed under the service category relating to the staffing: for example, invoice staffing hours under SE job coaching if the staffing is to coordinate or problem solve around SE job coaching services. (Formerly known as: CRP Staffing).

### **2.1.2 Assessment: Vocational Evaluation (AVE)**

This category should be used for the completion of interest and aptitude assessments.

### **2.1.3 Assessment: Vocational Evaluation – In House (AVE – In House)**

Vocational evaluation services involve the evaluation of work-related behaviors in a controlled environment. These assessments are conducted at CRP sites and not in the community. Vocational Evaluation – In House may only be used when there are no community-based evaluation options available and is paid at a daily rate. (Formerly known as: Vocational Evaluation: In-House).

### **2.1.4 Assessment: Community-based Work Evaluation (CBWE)**

This evaluative service is used to assess vocational aptitudes, work behaviors, work tolerance, level of support necessary to be successful with work, or any other factor to determine if a customer is likely to be successful performing in a competitive integrated job environment. These services may be used to determine eligibility (for example as part of trial work experiences) or to determine the nature and scope of VR services to

be included in the IPE. Federal regulations require evaluations to be conducted in the community to the greatest extent possible, and thus the vast majority of work evaluations will fall under CBWE instead of 'In House' assessment. (Formerly known as: Community-based Work Evaluation).

### **2.1.5 Assessment: Community-based Work Evaluation Site Development (CBWE-SD)**

The purpose of this service is for the CRP to secure the community based worksite where a CBWE is to be conducted. (Formerly known as: CBWE-SD). Note: This is the only former Job Site Development service that is not grouped into 'Job Search Assistance' (see Job Search Assistance in the next section).

## **2.2 Job Related Supports**

### **2.2.1 Job Search Assistance (JSA)**

Job search assistance activities support and assist an individual in searching for an appropriate job. Job search assistance may include help with resume preparation, identifying appropriate job opportunities, and developing interviewing skills.

Other job search activities include making contacts with companies on behalf of the customer (job site development). Job site development is utilized when a customer requires additional assistance beyond an independent job search. A CRP job developer will utilize their contacts and expertise to locate appropriate job matches in their local area that are aligned with the individual's interests, abilities, and capabilities as specified by the VRC. (Formerly known as: CBWA-JSD, P&F-JSD, and CSE-JSD)

### **2.2.2 Job Supports – Short-Term (SST)**

Job Supports - Short-term are support services provided after job placement to help stabilize the placement and promote job retention. Such services include short-term job coaching for persons who do not have a long-term supported employment goal. These services may also include resolving employer concerns such as time management, transportation, hygiene, attitudes, work site accommodations, etc. In cases where a

supported employment goal is present, please code under Supported Employment: Job Coaching. (Formerly known as: CBWA or P&F)

### **2.2.3 Job Readiness Training (JRT)**

Job readiness activities prepare an individual for the world of work and therefore are initiated prior to employment. These activities include: appropriate work behaviors, getting to work on time, appropriate dress and grooming, and activities that would assist in preparing the customer for a job, such as soft skills training.

## **2.3 Pre-employment Transition Services**

§361.48(a) defines the scope of vocational rehabilitation services which can be provided under pre-employment transition services (Pre-ETS).

These services are provided to students with a disability ages 15-21 (or up to the individual's 22<sup>nd</sup> birthday). Pre-ETS may be provided in a group or individualized setting. The following definitions do not imply nor guarantee that these services required under WIOA will be a CRP service option. The definitions are provided to describe the Pre-ETS services.

CRPs should refer students, family members, and other partners to VR to allow VR staff to communicate on Pre-ETS specifics. This will best assist the VR Program to deliver these specific services.

### **2.3.1 Job Exploration Counseling**

Job exploration counseling includes but is not limited to student vocational interest inventories, exploration of local labor market information (including in-demand occupations and student career interests) and an exploration of career pathways.

### **2.3.2 Work-based Learning Experiences**

Work-based learning experiences include but are not limited to paid or unpaid work experiences, internships, apprenticeships and on-the-job trainings located in the community (outside of the school setting). Examples of work-based learning experiences include, summer work experience, informational interviews, job shadowing, and short-term employment. Work-based Learning Experiences can be a contracted service through an RFP or when RFP openings are filled, or are unavailable in an IDVR

region/area. Work-based Learning Experiences may be procured by an authorization from IDVR.

### **2.3.3 Counseling on Enrollment Opportunities**

Enrollment counseling can include information on academic curricula, navigating the college application and admissions process, Free Application for Federal Student Aid (FAFSA) assistance, and assistance connecting to various support systems such as disability support services. Other examples include but are not limited to: counseling on course offerings and career options, types of academic/occupational training needed to succeed in the workplace, and postsecondary education associated with career fields or pathways, academic curricula advisement, college admittance process assistance, help with financial aid forms, or information on scholarship opportunities.

### **2.3.4 Workplace Readiness Training**

Workplace readiness training includes services designed to help students with disabilities develop social and independent living skills needed to prepare for employment. These can include communication and interpersonal skills (including soft-skills training), financial literacy, job-seeking skills, and training on understanding employer expectations. Workplace Readiness Training must be based on an IDVR approved curriculum.

### **2.3.5 Instruction in Self-advocacy**

Instruction in self-advocacy can include training on employee rights and responsibilities; requesting workplace accommodations, services and supports; requesting informational interviews; and/or promoting individual self-expression toward communicating concerns and needs.

## **2.4 Supported Employment (SE) Services**

Supported employment services are ongoing and needed to support and maintain an individual with a most significant disability in employment. The need for extended supports is a defining characteristic of a SE strategy. SE refers to competitive integrated employment, including customized employment, or employment in an integrated work setting which individuals

are working on a short-term basis toward competitive integrated employment, that is individualized and customized consistent with the strengths, abilities, interests, and informed choice of the individuals involved.

SE services may not be provided prior to an individual being placed into an employment position which requires supported employment services. **Job Site Development activities for all SE employment sites should be billed under Job Search Assistance, not Supported Employment, as federal regulations do not recognize these activities as SE.**

#### **2.4.1 Supported Employment: Job Coaching**

SE job coaching is an intensive process. Job coaching services are provided to an individual who has been placed in employment to stabilize the placement and enhance job retention. SE job coaching services may include up-to 24-months of job coaching for persons who have a supported employment goal and are making documented progress toward employment stability. Documented progress can refer to the fading of support intensity or duration, or an increase in work responsibilities for the customer.

As an ongoing support service, the job coach or another qualified CRP staff member must engage in an assessment of employment stability or service provision no less than twice monthly per 34 CFR §361.5(c)(37). This requires at a minimum twice-monthly monitoring at the worksite for everyone, unless other options are explicitly requested by the individual and noted by the VRC which could allow for twice-monthly off-site monitoring (a very rare exception).

This service is similar to Job Supports – Short Term but is utilized when long-term supports are indicated. (Formerly known as CSE Job Coaching).

##### **2.4.1.1 Documentation of Progress or Alternate Strategy Required for Continuation of SE Job Coaching Authorizations**

IDVR will continue to support SE Job Coaching for individuals making documented progress toward a competitive integrated supported employment goal up to 24 months as allowable under WIOA. As a part of

justifying additional SE Job Coaching authorizations, the division requires CRPs to provide documentation of this progress, or rationale detailing unique circumstances emerging in an individual's life which may have impacted their progress (e.g. death of a close family member, a transition to a new job coach), prior to a new SE Job Coaching authorization being issued. Finally, if no progress is being made with the current strategy, the CRP should document how they will try a different strategy/approach to promote progress/fading. Progress can be noted in multiple ways:

- The customer continues to learn the functions of the job (skill acquisition)
- Expansion of duties/responsibilities by the employer
- Increased wages or hours for the customer
- Evidence of greater independence as measured through less direct supervision, greater time on task/greater productivity, or fewer ongoing job coaching hours (fading)

#### **2.4.1.2 Documentation of Progress in SE Job Coaching: Learning Essential Job Functions / Expansion of Job Duties**

The following are examples of ways progress can be documented:

1. The documentation of skills acquired by the customer on the jobsite during the onboarding process.  
**Example:** "Jim continues to learn the essential functions of the position (4 of 7), and as of this week is now working on learning how to keep the department stocked to employer standards."
2. The documentation of expansion of customer job duties or an increase in hours or wage by the employer.  
**Example:** "Tracy's employer has added front desk coverage to her duties when other employees need to take a break, this represents an expansion of duties from the last authorization request."
3. The documentation of increased productivity/product based fading  
**Example:** "Julie has increased her progress toward meeting the employer standard of 100 units in an hour, completing 85 in that timeframe (up from 60 last report)."

### **2.4.1.3 Documentation of Fading in Supported Employment Job Coaching:**

Globally, fading represents the incremental reduction of support to the minimum level required for continued employer satisfaction and determines the ongoing hours to recommend for Extended Services provision. Once an individual reaches this level of stability, and maintains it for 90 days, the case can be closed successfully with the understanding that necessary extended services and/or natural supports are in place. Progress in fading can also refer to the fading of direct job coach supervision on tasks, illustrating increased independence on the part of the customer.

4. The documentation of increased independence through a reduction of direct job coach supervision/time-based fading.

**Example:** “Ray has increased his ability to work unsupervised and without prompts to 10 minutes on average this month (up from zero last month).”

5. The documentation of decreased support hours required over time.  
**Example:** “Jim requires fewer ongoing job coaching hours since the last authorization. He is down from 10 hours SE: Job Coaching to 8 hours of SE: Job Coaching per [time period].”

### **2.4.1.4 Documentation of Alternate Strategy to Promote Progress in the Absence of Skill Acquisition / Fading:**

If fading is not occurring following the customer learning all the essential functions of the position, a fading plan must be created prior to another SE Job Coaching authorization. Put simply, the VRC needs to know what the CRP attempted and how they will try another approach to promote greater independence on the job. The fading plan should incorporate timeline, goal and method as seen in the examples below, and should include the alternate strategy that will be attempted in order to promote progress:

6. The documentation of time based fading using Timeline-Goal-Method (Mills, 2012).

**Example:** Within X weeks, the job coach will support the customer Y minutes less per shift by using [strategy] (e.g. systematic instruction and prompts delivered through a digital device) to enable the customer to do Y more minutes of work without the job coach.

**Example:** Within X weeks, the job coach will leave the job site Y minutes earlier on Monday, Tuesday and Thursday by introducing [strategy] (e.g. a picture instruction sheet and engaging a co-worker to provide needed prompts).

7. The documentation of product based fading using Timeline-Goal-Method

**Example:** Within X weeks, Brian will increase his output from 4 units per hour to 6 units per hour utilizing [strategy] (e.g. a procedural job aid customized to his needs).

**Example:** Within X weeks, Seth will increase his number of social interactions on the job by [strategy] (e.g. greeting the assistant manager upon arrival and asking for his priorities for the day. This task will be included in his scheduling app on his phone).

#### **2.4.1.5 Documentation of Stability and Transition to Extended Support**

If no further fading is indicated for the customer (e.g. problems begin to emerge at lower levels of support that would be unsatisfactory for the employer) and the employer is satisfied with this level of performance, the VRC should be notified that the customer has reached initial stability and a transfer to Long-Term Supports (Extended Services) should be initiated. This determination should be written up in a final SE: Job Coaching report.

#### **2.4.2 Youth Extended Services (YES)**

WIOA allows VR to provide extended services for youth when comparable extended services are unavailable. Where an SE strategy is indicated for youth, and where youth will not be able to immediately access external extended services, VR can provide Youth Extended Services (YES) once initial job stabilization is achieved. Youth Extended Services (YES) under IDVR will be paid at the Extended Employment Services (EES) rate as they are identical services. Prior to the provision of VR funded YES, the VRC will need verification provided by the customer or guardian that external

extended service funds are currently not available from other sources in the community. These IDVR extended support services for youth can continue until externally funded extended services become available, or IDVR has provided YES for four years, or the individual reaches the age of 25 (whichever comes first). YES cannot be provided concurrently with any other VR service with the exception of Post-Employment Services (PES).

### **2.4.3 Customized Employment (Pilot Project)**

Customized Employment (CE) is currently being provided to participants through a three-region CE pilot project using a milestone payment structure. Billing for customized employment milestones can only be issued by CRPs who have staff recognized by IDVR as qualified to deliver Customized Employment services.

Customized Employment - Discovery

Customized Employment – Employment Plan

Customized Employment - Placement

SE Job Coaching

Please refer to Appendix C for a comprehensive description of CE services offered through the IDVR Pilot Project.

## Section 3: Overview of the On-Site CRP Monitoring Process

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Idaho Division of Vocational Rehabilitation (IDVR) will conduct an on-site evaluation of customer files for all Community Rehabilitation Programs (CRPs) every three years. A master list of all CRPs will be maintained by the Planning and Evaluation (P&E) manager for IDVR at the central office. The P&E manager or designee will work with each Regional Manager (RM) in advance of a CRP site visit in their local area to assure thoroughness and timeliness of the review.

IDVR is required to monitor all CRPs authorized to provide services to IDVR customers in order to:

- (1) promote quality improvement and
- (2) ensure compliance with applicable federal requirements in accordance with 34 CFR §80.40(a):

*Monitoring and reporting program performance/Monitoring by grantees:* Grantees are responsible for managing the day-to-day operations of grant supported activities. Grantees must monitor grant supported activities to assure compliance with applicable Federal requirements and that performance goals are being achieved. Grantee monitoring must cover each program, function or activity.

### **3.1 Process:**

IDVR will conduct an on-site evaluation of customer files served by all CRPs every three years. IDVR will maintain a comprehensive CRP Monitoring List.

The local area's RM will contact the CRP one month prior to schedule a review.

IDVR will notify the CRP 48 business hours prior to the review identifying the files selected for review. If a CRP needs time beyond 48 hours to gather files (e.g. files are in remote locations), the CRP will request to

receive the file list earlier from IDVR. Approval for additional time will be made by the P&E manager.

Files reviewed will be selected from customers served by the CRP in the previous two complete quarters prior to the review.

Fourteen cases that utilize general funds and six utilizing SE funds will be reviewed. If a particular CRP did not serve the number of customers identified above, all cases served by the CRP will be reviewed. A maximum of 20 files will be reviewed per site visit.

### **3.2 Day of Review:**

On the day of the review, the IDVR RM or designee will brief the CRP representative(s) of the review process.

A written narrative will be requested from the CRP representative regarding the following fiscal question: “Does your fiscal department have a policy or set of guidelines for multiple or group billing procedures for the same service?”

Upon completion of the reviewed files, the IDVR RM or designee will debrief with the CRP representatives to provide them with general feedback on the process and findings.

### **3.3 Review Follow Up:**

The IDVR RM will send the narrative summary and Corrective Action Plan (CAP) outline to the CRP (if a CAP is indicated) within 45 calendar days of the review.

This narrative summary will detail the findings, recommendations and observations of the review team which are defined as:

**Finding:** A finding is issued when a CRP is out-of-compliance with Federal/State regulations or CRP billing requirements/other business rules expressly stated by IDVR. Each finding coming from a formal CRP monitoring process requires a Corrective Action Plan be developed and submitted by the CRP to IDVR within 90 Days of

receiving the completed monitoring report. Any finding must be directly related to CRP/IDVR business.

**Recommendation:** A recommendation is given by the monitoring team when an opportunity for quality improvement is identified. Recommendations require no action but indicate suggested areas to strengthen business processes and working relationships. IDVR strongly encourages CRPs to give serious consideration to recommendations included in the monitoring reports.

**Observation:** Observations are notes of interest from the review team and require CRP interpretation to determine whether or not they are meaningful or actionable depending on the circumstances of that CRP. Observations do not require an action plan.

The CRP will respond to all findings with a proposed corrective action within 90 days of the receipt of the narrative summary and CAP form. Each finding will include: What will be corrected, who will take the lead on correcting, and how and when the corrective action will occur.

If it is determined that a second CRP Monitoring Review is warranted prior to the three-year cycle, RM's will clearly state that in their narrative summary. A follow up review will be established one year from the noted review.

### **3.4 Second Review Follow Up:**

Following the second on-site review, a summary narrative will be provided to the CRP regarding progress in correcting noted findings or will state if insufficient progress has been made.

If no significant progress has been made as determined by the RM and reviewed with the IDVR P&E manager or designee, the CRP will be notified that IDVR may cease to refer customers for the purpose of providing vocational rehabilitation services until improvement is shown in the identified area(s) of concern.

The RM will forward this narrative summary to the CRP.

### **3.5 Records Retention Period for Monitoring:**

CRPs should retain all case specific documentation (invoices, reports, authorizations, and referral information) in a customer's current working file for one-year following termination of services. This will allow IDVR access to complete case files for monitoring.

### **3.6 Monitoring Checklist:**

Once a revision of IDVR's current monitoring protocol is completed, a checklist will be developed and published within this guide so CRPs can see what they will be reviewed on.

## Appendix A: Example of a completed referral form

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Coming in a subsequent update of this document.

## Appendix B: Remote/Underserved Areas

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### **Travel to Remote/Underserved Areas:**

Travel costs may be reimbursed for service provision in remote/underserved areas when travel is in excess of 25 miles from a CRP frontline staff's home base of operations. Remote/underserved areas are those areas lacking access to adequate service provision and are identified at a regional level by Regional Managers (RMs). IDVR may not reimburse these travel costs if the service has taken place in an area not explicitly identified in their region below, unless an exception is approved by an RM prior to the travel taking place. RMs will update CRPs in their region when a new underserved area is identified, or conversely when an area no longer qualifies as remote or underserved.

CRPs may bill VR for travel to these identified destinations, when exceeding the 25-mile threshold. CRPs are expected to consolidate rural travel to the greatest extent possible to minimize costs (i.e. meeting with multiple contacts on the same trip). When multiple contacts occur during rural travel, the CRP will proportionally distribute total trip costs across customers served. Hours billed cannot exceed actual time spent by CRP staff.

Exceptions to underserved area definition may occur when specialized services are not available in a particular area and will be addressed on a case by case basis. Ultimate approval of these exceptions is made at the discretion of an area's Regional Manager.

### **Region 1 (Coeur d'Alene):**

Region 1 supports travel to the following underserved/remote areas:

- Silver Valley: (Kellogg, Wallace, Mullan)
- South of Coeur d' Alene: (Plummer, Worley, St. Maries, Harrison)
- North and West of Sandpoint: (Bonners Ferry, Clark Fork, Priest River, Oldtown)

## **Region 2 (Lewiston):**

Region 2 supports travel to the following underserved/remote areas:

- The US 95 Corridor between Culdesac and Riggins, ID (including Culdesac, Craigmont, NezPerce, Cottonwood, Grangeville and Riggins)
- The US 12 Corridor east of Orofino (including Orofino, Kamiah, and Kooskia)

## **Regions 3/7/8 (Treasure Valley Regions):**

Remote/underserved travel is authorized for the following zip codes for Region 3, 7 and 8:

Council- 83612

Cambridge- 83610

Homedale - 83628

Melba - 83641

Marsing - 83639

Wilder- 83676

Notus - 83656

Parma - 83660

Weiser – 83672

Cascade- 83611

McCall- 83638

Garden Valley- 83622

Mountain Home- 83647

Horseshoe Bend- 83617

**Region 4 (Twin Falls):**

Travel can be billed in Region 4 to Camas, Lincoln and Gooding Counties.

No travel can be billed for services conducted in Twin Falls, Cassia, Jerome, Minidoka, or Blaine Counties with the exception of **the following zip codes only:**

Twin Falls County zip codes:

1. Rogerson – 83302

Cassia County zip codes:

1. Almo - 83312
2. Malta - 83342

**Region 5 (Pocatello):** No remote travel is authorized for Region 5. Exceptions can be granted through the Region 5 Manager when required.

**Region 6 (Idaho Falls):** No remote travel is authorized for Region 6. Exceptions can be granted through the Region 6 Manager when required.

## Appendix C: IDVR Components of Customized Employment 2017 Pilot

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### **Background:**

IDVR is expanding Customized Employment under WIOA. One method the Division is utilizing to maintain fidelity to the CE process is a requirement that staff are recognized by IDVR as qualified to offer CE's 'Essential Elements' as outlined by the Workforce Innovation Technical Assistance Center. The successful incorporation of these best practices will require the statewide capacity building of CRP staff and milestone rates sufficient to develop and retain qualified staff.

### **Customized Employment (CE) Discovery - Milestone 1: Complete the Discovery Process (\$1750)**

#### **Notes:**

- Requires knowledge and deployment of qualitative research strategies not common in traditional, comparative assessments.
- Research indicates Discovery should take 35 hours on average over 5-7 weeks for individuals with little to no community employment experience.

#### **Deliverables:**

- Completed Discovery Profile which serves as evidence of the process.
- Monthly submission of current form Discovery Profile and Hour Log to VR.

#### **Milestone 1 Activities:**

\$1750 Milestone 1 payment for CE Discovery incorporates the following:

Discovery Phase 1: Complete the Discovery process (10 activities as appropriate to the individual.)

- Explain the CE process and the activities that may be involved in individualized, customized job development to the job seeker and family.

- Anticipate, consider, discuss, set-up, and/or coordinate the financial supports that are required to implement and maintain the CE process, involving a Disability Program Navigator (e.g., work incentive specialist) or others with expertise with funding issues (e.g., manager, administrator), as necessary.
- Complete any forms and paperwork necessary to intake the job seeker or to initiate funding supports for CE services (e.g., identification, address, photo release, access to information and records, and release to use information gathered in Discovery).
- Identify a profile format or template for recording and capturing relevant job seeker information from the Discovery process.
- Identify and involve a support team (delegating roles to team members as needed) that can help identify the individual's strengths, interests, preferences, skills, and support needs, as well as provide expertise, valuable input, and resources into the process of attaining and maintaining meaningful employment.
- Begin the Discovery process with the job seeker, which should define the job seeker's ideal conditions of employment, learning characteristics, interests, preferences, contributions, task competence, and support needs. (If desirable, the personal profile may be started, but it should be continuously updated and revised as new information is learned).
- Observe the job seeker perform activities in a variety of settings, such as the job seeker's home, school, and the neighborhood and community within which the job seeker functions, taking care to document information about the job seeker's interests, support needs, successful support strategies, and performance with notes and pictures.
- Participate with the job seeker in a novel or unfamiliar activity, as well as family activities/routines, documenting with notes, pictures and information about the job seeker's interests, performance, successful support strategies, and interactions with others.

- Interview people who know the job seeker well to gather and document information about the job seeker's interests, support needs, and performance in various activities.
- Review job seeker's files and other records to learn more about the job seeker.

Discovery Phase 2: Complete a profile based upon the Discovery process (2 activities)

- Integrate the information gathered during Discovery, and revise or complete the personal profile with the job seeker.
- Continually update the file with information about identified skills and workplace contributions, as well as possible vocational areas of interest (to include self-employment options).

### **Customized Employment (CE) Plan - Milestone 2: Employment Plan/Portfolio (\$500)**

#### **Notes:**

- Service should immediately follow Discovery (Discovery information becomes stale over time)
- Planning must be facilitated by staff who were directly involved in that job seeker's Discovery process
- Planning must incorporate job developer

#### **Deliverables:**

- Plan for employment development activities
- \*Customized strength-based portfolio/resume \*(when indicated)

#### **Milestone Activities:**

\$500 Milestone payment incorporates the following:

Employment Plan: (5 activities)

- Obtain a preliminary review of the personal profile from the job seeker.
- Conduct a CE plan development meeting with the job seeker and the CE support team to review and discuss the results of Discovery; to

map out an initial plan for seeking and negotiating a CE situation for the job seeker; and to assign tasks to various team members based on their connections, strengths, and contributions.

- Develop a plan for employment development activities with the job seeker based on his/her identified vocational themes, skills, workplace contributions, support needs, and other conditions for success to include a list of potential employers and task list. This may also include identifying a leader/coordinator for employment development activities
- Discuss with the job seeker his/her preferences and develop a plan for disclosure of the disability to include timing and way to discuss the disability.
- Develop a strength-based portfolio/resume with the job seeker that represents his/her skills and abilities (contributions) for potential employers
  - If the CE Plan team determines that a resume or portfolio approach would not best represent the customer, a resume/portfolio would not be required as a deliverable for that customer.

### **Customized Employment (CE) Placement – Milestone 3: Customized Employment and Placement (\$2500)**

#### **Note:**

CE as defined in WIOA “represents a [substantial] departure from ‘business as usual’ regarding how employment seekers become employed, the role of the job development representative is multi-layered and critical for success.” New responsibilities include but are not limited to non-traditional engagement with employers and mastery of CE concepts including an ability to articulate the process to employers.

- Involves extensive preparation prior to initial employer engagement
- Requires the utilization of novel networking strategies
- Requires ability to identify and disseminate unmet/unidentified employer needs
- Requires strong interpersonal/negotiation skills

- Support toward increasing longevity of these specialists should be considered, initial training

### **Deliverables:**

- CE proposal customized for employer needs/job seeker
- Customized job description developed with the employer
- Competitive Integrated Placement
- Natural Supports Analysis (where indicated)

### **Milestone 3 Activities:**

CE requires high quality job development - \$2500 milestone payment for CE and Placement incorporates:

Customized Employment & Placement (9 activities)

- Present the job seeker, and CE objective or plan as needed, to the employer in a manner establishing his or her value to the organization (that is, specifically connect the individual's strengths to organizational needs).
- Set up informational interviews with potential employers.
- Conduct informational interviews and participate in tours of businesses with potential employers to learn about the businesses, their operations, business cultures, work environments, and current or anticipated future opportunities and challenges facing each business.
- Determine potential needs of an employer using information gathered in informational interviews and tours to determine a business need.
- Identify social networks, strategically enter those networks, and act as a bridge to develop social capital (relationships which can be leveraged to match the job seeker's interests and strengths) for the job seeker.
- Develop a formal or informal CE proposal with the job seeker that fills the employer's business need with the job seeker's contributions.

- Contact the employer to schedule a customized job development meeting with the employer.
- Conduct a customized job development meeting with the employer and job seeker to negotiate a customized job description, job supports, and terms of employment (for example: number of hours, wages).
- Analyze how to maximize naturally occurring supports, building on the organization's training and development programs to ensure that the job seeker will have adequate on-going support resulting in continuing meaningful employment.

#### **Phase 4: SE Job Coaching (\$47.80/hr.)**

##### **Deliverables:**

- Periodic reports on continued employment stability/fading attempt updates.
- See Supported Employment: Job Coaching in the Services section of this document for detailed information on this service.

##### **Phase 4 Requirements:**

The hourly rate for CE Job Coaching and Stabilization will be tied to IDVR's hourly service rate for SE Job Coaching (currently \$47.80) as they are equivalent services. Hours will vary significantly dependent upon individualized need, and the Division has opted for a tailored hourly approach to better promote the stability of placements over a global milestone payment for this phase at this time.

## Appendix D: CRP Services Crosswalk

Old CRP Service	New CRP Service
CBWA	Job Supports – Short Term (SST)
CBWA Job Site Development	Job Search Assistance (JSA)
CBWE	Assessment: CBWE (CBWE)
CBWE Site Development	Assessment: CBWE Site Development (CBWE-SD)
CRP Staffing	Assessment: Staffing (Staffing)
CSE Job Coaching	SE Job Coaching (SE)
CSE Job Site Development	Job Search Assistance (JSA)
Personal/Vocational Adjustment	Job Readiness Training (JRT)
Placement & Follow Along (P&F)	Job Supports – Short Term (SST)
Placement & Follow Along Job Site Development (P&F-JSD)	Job Search Assistance (JSA)
Pre-ETS Counseling on Enrollment Opportunities	Pre-ETS Counseling on Enrollment Opportunities
Pre-ETS Instruction in Self-Advocacy	Pre-ETS Instruction in Self-Advocacy
Pre-ETS Job Exploration Counseling	Pre-ETS Job Exploration Counseling
Pre-ETS Work Based Learning Experience	Pre-ETS Work Based Learning Experience
Pre-ETS Workplace Readiness Training	Pre-ETS Workplace Readiness Training
Vocational Evaluation (interest/aptitude assessments)	Assessment: Vocational Evaluation (AVE)
Vocational Evaluation/In House (non-community evaluation of work-related behaviors)	Assessment: Vocational Evaluation – In House (AVE – In House)
	Youth Extended Services (YES)*
Customized Employment Services	CE Discovery (Pilot Only)*
Customized Employment Services	CE Employment Plan (Pilot Only)*
Customized Employment Services	CE Placement (Pilot Only)*
<i>*Indicates a New VR Service</i>	

## Appendix E: Version History

<b>Version</b>	<b>Date</b>	<b>Action</b>	<b>Area Impacted</b>
1.0	September, 2018	Effective Date	New
1.01	January, 2019	Removed payment provision for “no-shows” as not allowable federal expenditure	Element 1.8
		Removed ‘and communication’ from limits to report writing. Limits apply to monthly report writing, not communication	Element 1.4