

Client name: _____



Nebraska Self Employment Services

NSES

Progress Checklist

*(Forms to be completed by VR Staff)

Pre-Application Phase *(SE Pre-Assessment, ESE Workshop Referral)

- _____ Client expresses interest in self employment and discusses ideas with VR staff. At this time, Client completes VR Self Employment Pre-Assessment form and discusses with VR staff as means to clarify and document the business idea
- _____ **IF APPROPRIATE**, VR staff suggests client attend Exploring Self Employment Workshop
- _____ VR staff completes “Exploring Self Employment (ESE) Workshop Referral Form found on The Abilities Fund website (www.abilitiesfund.org) or VRIS and forwards completed form to NSES
- _____ Client participates in ESE Workshop, decides whether or not self employment is right for them and notifies VR staff of decision
- _____ If client decides to pursue self employment, VR staff continues with Application Phase activities

Application Phase *(SE Assessment & Referral)

- _____ **IF APPROPRIATE**, VR staff submits “Self Employment Assessment and Referral Form” to NSES along with a copy of the completed VR Self Employment Pre-Assessment form
- _____ NSES sends email link Informed Choices© application to client or hard copy in mail if client does not have email access
- _____ Client completes application within 30 days
- _____ Application interview is scheduled with client, VR staff and NSES
- _____ Copy of completed application is provided to VR staff and client
- _____ Application summary/recommendation is provided by NSES to VR staff and client

Phase I – Feasibility (Estimated 60 days to completion)

- _____ NSES recommends Feasibility Assessment services
- _____ Feasibility Assessment begins upon agreement of VR staff and client
- _____ Target income goal is set by the client
- _____ NSES forwards a copy of the Feasibility Assessment to VR staff and client
- _____ Feasibility meeting conducted
- _____ NSES provides a summary/recommendation based upon the Feasibility Assessment

Phase II – Business Plan (BP) Development (Estimated 80 days to completion)

- _____ NSES recommends business planning services
- _____ VR staff agrees with NSES recommendation
- _____ Business planning services begin
- _____ NSES assists the client prepare to present their BP and provide client with details regarding what documentation is required—including written estimates
- _____ NSES forwards a copy of the business plan to VR staff prior to BP Presentation & Review meeting

Phase III – BP Presentation and Review *(IPE is signed)

- _____ NSES contacts the counselor to schedule a BP Review meeting and confirms via email
- _____ BP Presentation and Review meeting is held
- _____ Remaining business plan and/or financial assistance issues are resolved
- _____ NSES sends a “recommendation for funding” email to VR staff and client that includes final copy of BP, financials and all estimates
- _____ VR staff completes authorization for financial assistance
- _____ Client receives financial assistance and makes purchases as appropriate
- _____ Client provides copies of all receipts for purchases to VR staff
- _____ Business start up (all purchases complete) within 6 months of funding

Phase IV – Business Support Services (BSS)

- _____ Monthly business support services commence
- _____ Monthly BSS reports are provided to VR staff and client
- _____ Clients submit monthly financial statements to NSES, they are forwarded to VR staff
- _____ Business support services is available to client by NSES immediately after funds are authorized and continues up to a year after client meets their target net income goal
- _____ Clients may participate in additional BSS services including “Build a Better Business” Workshops and “Main Street” events
- _____ Self employment files remain in “employment follow-up” milestone until target income goal is met or income has stabilized for a minimum of 3 months