

**Flow Sheet 101**  
**May 22, 2007**

There are several flow sheet format options available in QUEST.

- Caseflow by Team
- Caseflow by Team Contact
- Caseflow by Providing a Team Service
- Caseflow by Contact/Service Provider
- Consumer Roster by Team Contact
- Consumer Roster by Providing a Team Service
- Consumer Roster by Contact/Service Provider

Except for the Consumer Roster format, the other caseflow sheet formats will contain data similar to that is shown in the document.

<p><b>Caseflow Sheet Basic Data Items</b></p> <ul style="list-style-type: none"><li>• Name</li><li>• Determinations</li><li>• SSN</li><li>• Address and Phone</li><li>• Team Contact</li><li>• Date into Current Activity</li><li>• Goal</li><li>• Approximate Months in Activity</li><li>• Team Services/Community Services*<ul style="list-style-type: none"><li>○ Service Type</li><li>○ Category-Name</li><li>○ Status</li><li>○ Date Begin-Date End</li><li>○ Provider</li></ul></li><li>• Graduation Date (<i>Only cases started in Transition Prog.</i>)</li><li>• Job</li><li>• Employer and Employer Address</li><li>• Hrs/Week</li><li>• Wage</li></ul>
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*\* There is a printing option that allows you to print the flow sheet with or without the list of Team and Community Services. Services that have a start date within the next 30 days or that are currently being provided will display on the flow sheet if “with” is selected. Services remain on the flow sheet until they are marked in QUEST as completed or terminated.*

**I n f o r m a t i o n   a n d   R e f e r r a l**

**Referred – Orientation Services**

Consumer has called VR to schedule a group or one-on-one orientation appointment. At the orientation, the consumer learns about our program and services in order to make an informed decision about continuing with VR. If deciding to continue, the consumer meets with a VR Specialist to begin the process. The consumer record should not be in I & R for more than 30 days.

**E m p l o y m e n t**

## **Applied for VR – Initial Assessment**

Consumer has signed an application. In this milestone – activity, staff gathers necessary medical, psychological and/or social security information, as well as work history information from the consumer, in order to make an eligibility decision. Eligibility decisions are to be made in 60 days.

- An extension of the 60-day eligibility decision requires consumer agreement.
- Determination of priority status is typically made immediately following the eligibility decision.

- Determinations:
    - Eligibility Determination Due
    - Overdue Eligibility Determination

## **Eligible – Waiting for OOS**

Consumer has been made eligible, but either the Order of Selection Priority Status was not determined or the consumer is not in a priority group currently being served.

## **Eligible – Planning**

Consumer must have been made eligible for services and Order of Selection Priority Status determined in order to enter the Eligible – Planning milestone – activity. Staff will work with the consumer in completing the Discover the Job that Works for You Booklet and the development of the Individualized Rehabilitation Plan.

Staff may also provide

- Vocational Evaluation (Career Planning)
- Community Assessment
- IL Skills Assessment
- Benefits Orientation
- Assessment support services needed by the consumer to complete the assessment of rehabilitation needs.

Staff has 90 days for planning and developing an Individualized Plan for Employment (IPE).

- Determinations:
    - IPE Approval Due
    - Overdue IPE Approval

## **IPE Completed – Waiting for Funding**

This milestone-activity would be used if a consumer's IPE has been approved, but the consumer must wait for services until agency funding becomes available. Unless the agency is in a funding situation that requires waiting for funding, QUEST automatically moves the case at IPE Approval through the milestone – activity **IPE Completed – Waiting for Funding** to the milestone – activity **IPE Completed – Waiting for Services**.

- Determinations
  - Annual Review Due
  - Overdue Annual Review
  - IPE Amendment

### **IPE Completed – Waiting for Services**

This milestone – activity is used when a consumer’s IPE has been approved, but services are not available or do not immediately begin.

- Determinations
  - Annual Review Due
  - Overdue Annual Review
  - IPE Amendment

### **Services Initiated – VR Services**

This milestone – activity is used when the consumer has started any of the following planned Team and Community Services.

- Counseling
  - Personal adjustment
  - Disability awareness
- Employment
  - Job seeking skills training
  - Employment success skills
- IL skills training
  - IL exploration & skills
  - Personal management
- Miscellaneous training
  - Benefits analysis
  - Basic academic/literacy training
  - Skill Building
- Rehabilitation technology
  - Technology use training
  - Rehab engineering
  - Prostheses
  - Durable medical goods
  - Home modification
  - Vehicle modification
- Post secondary training
  - College training
  - Technical training
- Treatment
  - Medical treatment
  - Drugs
- Job readiness training
- On-the-job-training
  - Employer
  - Job coach

- Placement with job coaching
- Supported employment
  - Individual supported employment
  - Crew supported employment
- Small Business
  - Licenses/permits
  - Tools/equipment/stocks
  - Vehicle initial costs
  - Technical Assistance

- Determinations:
  - Annual Review Due
  - Overdue Annual Review
  - IPE Amendment

**Services Initiated – Employment Services**

When the consumer has completed all necessary services to become “employment ready,” the consumer record will be moved into the milestone – activity Services Initiated – Employment Services. The consumer may be looking for work with the assistance of VR Placement staff, VR Counseling staff, a third party, or independently. The VR Placement staff, VR Counseling staff and the consumer should keep in regular contact with each other so everyone knows what’s going on with the job search.

Contact with the consumer should be weekly until the client is employed. If employment is not secured within 90 days, the consumer and appropriate team members must meet to review the consumer’s job goal, examine possible barriers to employment and make necessary adjustments (i.e., Does the job goal need to be changed? Does the consumer need to improve interviewing or social skills?).

- Determinations:
  - Annual Review Due
  - Overdue Annual Review
  - IPE Amendment

**Service Initiated – Employment Follow-up**

The consumer record is to be moved into this milestone – activity when the consumer gets a job. The exception to this is Supported Employment when a consumer record is moved into this milestone-activity once VR, the provider and the consumer agree that the consumer has stabilized on the job. For other than Supported Employment cases, VR staff should make two follow up contacts with the consumer every 30 days of employment and, where appropriate, one employer contact in the first 90 days of employment. Retention services are provided when necessary to help the consumer retain the job. For Supported Employment cases, the contacts are primarily made with the provider. The consumer must satisfactorily maintain the job for a minimum of 90 days before the consumer can be moved to Employed-Competitive Employment.

- Determinations:
  - IPE Amendment for Outcome
  - Employment Determination Due
  - Overdue Employment Determination
  - Annual Review Due
  - Overdue Annual Review

## E m p l o y m e n t   W a r r a n t y

### **Employment – EW Monitoring**

Consumer is contacted at 90-day, 180-days, and 1 year following the date the consumer record entered Employed – Competitive Employment.

- Monitored by Easter Seals
- Determinations
  - 90 Day EW Follow-up Due
  - Overdue 90 Day EW Follow-up
  - 180 Day EW Follow-up Due
  - Overdue EW Follow-up
  - 1 Year EW Follow-up Due
  - Overdue 1 Year EW Follow-up
  - 2 Year EW Follow-up Due
  - Overdue 2 Year EW Follow-up
  - 3 Year EW Follow-up Due
  - Overdue 3 Year EW Follow-up

### **EW – EW Services**

The consumer record is moved from EW Monitoring to EW Services if an Amended IPE has been written to provide Team and/ or Community services to the consumer in order to maintain, regain or advance in employment.

### **EW – EW Follow-up**

The consumer record is moved into this milestone – activity when the consumer regains or advances in a job, or services have been provided to maintain the original job at Employment Outcome. VR staff should make two follow up contacts with the consumer every 30 days of employment and, where appropriate, one employer contact in the first 90 days of employment. Retention services are provided when necessary to help the consumer retain the job. The consumer must satisfactorily maintain the job for a minimum of 90 days before the consumer can be moved to EW – Employed.

- Determinations:
  - Employment Determination Due
  - Overdue Employment Determination

### **EW – EW Final Monitoring**

A one time successful outcome may be taken from the Employment Warranty Program. The consumer case record is placed into this milestone – activity if the requirements for a successful outcome have been met. The consumer is contacted at 90-day, 180-days, and 1-year following the date the consumer record entered EW Employed.

- Monitored by Easter Seals
- Determinations
  - 90 Day EW Follow-up Due
  - Overdue 90 Day EW Follow-up
  - 180 Day EW Follow-up Due
  - Overdue EW Follow-up
  - 1Year EW Follow-up Due
  - Overdue 1 Year EW Follow-up
  - 2 Year EW Follow-up Due
  - Overdue 2 Year EW Follow-up
  - 3 Year EW Follow-up Due
  - Overdue 3 Year EW Follow-up

### **Transition**

Transition Consent – Transition Services

This is the only milestone – activity on the case flow sheet for the Transition Program.

- School Name
- Contact
- Phone

### **Caseflow Totals**

A caseflow totals page can be printed that summarizes the total cases in Information and Referral, Transition, Employment, and Employment Warranty programs as well as some milestone and activity totals within those programs.