VR-SFP Chapter 4: Employment Assessments

Revised February 1, 2022

# 4.1 Overview of Employment Assessments

Employment assessments are tools that evaluate a customer's work and training background, general functional capacities, and social behavior. Employment assessments are designed to determine a customer's present and future vocational potential and to evaluate the customer's employment-related strengths and limitations.

This chapter includes information on the following employment-related assessment services:

* Vocational Evaluation
* Situational Assessments and Work Samples
* Environmental Work Assessment (EWA)
* Career Planning Assessment (CPA)

Premium payments may be available for some employment assessment services. Premium payments are paid after all deliverables for the service have been achieved. For more information about premiums, refer to [Chapter 20: Premiums](https://twc.texas.gov/standards-manual/vr-sfp-chapter-20).

Any request to change a service description, process and procedure, or outcome required for payment must be documented and approved by the Vocational Rehabilitation (VR) director, using [VR3472, Contracted Service Modification Request](https://twc.texas.gov/forms/index.html) for Vocational Assessments, before the change is implemented. The approved VR3472 must be maintained in the provider’s customer case file. For more information, refer to [VR-SFP 3.6.4.2 Evaluation of Service Delivery](https://twc.texas.gov/standards-manual/vr-sfp-chapter-03#s3-6-4).

# 4.2 Staff Qualifications

Before services are provided to customers, the service provider's director must approve [VR3455, Provider Staff Information](https://twc.texas.gov/forms/index.html) Form, completed by each staff member, and submit the approved form to the provider's assigned VR regional quality assurance specialist or designee. The staff member must document the customer's qualifications on VR3455 and provide evidence of meeting all qualifications by providing, for example, transcripts, diplomas, reference letters, credentials, and/or licenses.

It is preferred, but not required, that the provider staff have a varied and successful work history and experience working with individuals with disabilities.

Each individual who administers vocational tests, batteries, and/or other instruments requiring certification must be certified by the appropriate entity.

The provider must give the VR regional quality assurance specialist or designee assigned to the contract an up-to-date written list of vocational tests, batteries, and/or other instruments when the contract is executed or renewed, in addition to any time instruments that are added or deleted. The list must:

* identify each instrument used to evaluate customers; and
* describe what each instrument is intended to measure.

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## 4.2.4 Career Planning Assessment Evaluator

The CPAevaluator must have:

* a current University of North Texas Workforce Inclusion and Sustainable Employment (UNTWISE) Supported Employment Specialist credential; and
* a high school diploma or GED; however, a bachelor's degree in rehabilitation, business, marketing, or related human services is preferred.

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## 4.5.1 Environmental Work Assessment Service Description

An EWA is a diagnostic tool that assesses how the customer responds to variables in a work environment. The EWA is an accurate assessment of the correlations between a customer's performance and environmental variables and is critical to the customer's ability to find and maintain employment. Results of the assessment identify the variables in a work environment that affect the customer's ability to function at his or her full potential. The EWA is provided in person and cannot be conducted remotely.

Any request to change a service definition, process and procedure, or outcomes required for payment must be documented and approved by the VR director, using [VR3472, Contracted Service Modification Request for Vocational Assessments](https://twc.texas.gov/forms/index.html), before the change is implemented. The approved VR3472 must be maintained in the provider’s customer case file. For more information, refer to [VR-SFP 3.6.4.2 Evaluation of Service Delivery](https://twc.texas.gov/standards-manual/vr-sfp-chapter-03#s3-6-4).

The EWA is most appropriate for a customer who:

* has a neurodevelopmental disorder that significantly affects him or her;
* has a history of behavior that varies depending on the environment; and
* may benefit from an evaluation that assesses how his or her neurodevelopmental disorder may manifest in a work setting.

The EWA evaluator assesses the customer's skills in at least three work environments that align with his or her interests and the employment goal in the customer's individualized plan for employment (IPE), when known. Each environment is assessed for a minimum of two hours.

**Exceptions**

The following exceptions are allowed when conducting an EWA:

* Conducting an EWA in another environment—Environments that accurately mimic the intended work environment are acceptable when an intended work environment is not available or when another environment is in the best interest of the customer. For example, if the intended work environment is loud, busy, and bright, then the alternate environment in which the assessment is conducted must mimic those same variables in order for the assessment to be valid.
* Assessing three environments during an EWA—One environment can be used twice, if changing the day or time would significantly alter the environmental variables. For example, the environment in a grocery store on a Saturday at 1:00 p.m. is significantly different from the environment at the same grocery store on a Sunday at 11:00 p.m. The assessment must be conducted in an environment that accurately mimics the intended work environment.
* Spending at least two hours per environment—If appropriate, assessments in the same location can occur over time. For example, a customer can go to an environment for one hour on one day and go to the same environment for the second hour on another day.
* Reviewing the results of the EWA with the customer in person—If an in-person meeting with the customer is not possible, the VR counselor may approve a teleconference to review the EWA results. The written approval must be kept in the evaluator's and the customer's case files.

The EWA may be conducted during any phase of the VR process, but it is typically conducted during the development of the IPE. The EWA is not a Vocational Evaluation or a Career Planning Assessment.

For more information on fees for the EWA, refer to the fee chart.

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# 4.6 Career Planning Assessment

## 4.6.1 Career Planning Assessment Service Description

The Career Planning Assessment (CPA) is a functional assessment designed to evaluate the customer’s work skills, determine support needs, and provide information needed to plan for future employment. The CPA is completed by the CPA evaluator using an individualized and supportive approach. The CPA evaluator conducts the assessment using a variety of strategies, including exploration and work skills assessment. During the CPA, the CPA evaluator conducts interviews, observes the customer in natural environments such as at home or in the community, and assesses the customer in three integrated work settings. The CPA includes multiple visits, which consist of a minimum of three hours of home and community exploration and a minimum of six hours of career exploration and work skills assessments. Interviews with the customer and his or her circle of support may be done in person or remotely. All observations and assessments of the customer’s skills and abilities in the community or a work environment must be done in person only.

## 4.6.2 Career Planning Assessment Process and Procedure

### 4.6.2.1 Referral

The VR counselor sends VR1629, Referral for Career Planning Assessment, and a SA to the CPA evaluator. The VR counselor should provide relevant documentation, such as case notes, psychological reports, and vocational and/or medical evaluations, that prepare the provider to assess the customer.

If an EWA is conducted before the CPA, payment for the CPA may be prorated or the CPA may be purchased fully as determined by the VR counselor. When payment for the CPA is prorated, the work skills assessment section of the CPA does not need to be completed. However, if circumstances dictate, such as significant changes in the customer’s life or a long amount of time between assessments, an entire CPA may be purchased a second time with an approved VR3472, Contracted Service Modification Request for Vocational Assessments, before the referral.

To prorate payment for the CPA, VR staff issues a prorated service authorization (SA) to the provider using the fee listed in VR-SFP 4.7: Employment Assessments Fee Schedule. On the VR1630, Career Planning Assessment, the provider must complete all sections except for the three work skills assessments.

At the time of referral, the VR counselor authorizes disability-related premiums, if appropriate. For more information on premiums, refer to [VR-SFP Chapter 20: Premiums](https://www.twc.texas.gov/standards-manual/vr-sfp-chapter-20).

### 4.6.2.3 Home and Community Exploration

The CPA evaluator conducts home and community exploration with the customer by observing the customer in natural environments, such as at home and in the community. The CPA evaluator must spend a minimum of three hours conducting home and community exploration with the customer.

During home and community exploration, the CPA evaluator conducts interviews with the customer and members of the customer’s circle of support and observes the customer engaging in typical activities within home and community settings.

When conducting home and community exploration, the CPA evaluator collects information on the customer’s:

* independent living skills and household responsibilities;
* circle of support;
* financial resources;
* community and long-term support resources;
* transportation access and abilities;
* education and learning style; and
* other pertinent information.

### 4.6.2.4 Career Exploration and Work Skills Assessment

The CPA evaluator spends at least six hours conducting the career exploration and work skills assessment.

During career exploration, the CPA evaluator administers career exploration activities to explore the customer’s vocational interests and preferred employment conditions. Career exploration activities should entail researching industries or fields, exploring employers in the local community, discussing job tasks and environmental preferences, reviewing education and experience requirements, and/or reviewing outlook and wages.

During the work skills assessment, the CPA evaluator observes the customer in three integrated work settings that align with the customer’s interests and allow for an assessment of the customer’s abilities and skills. The work skills assessment must take place at more than one location or multiple environments within one location when necessary.

The CPA evaluator monitors the customer closely during the work skills assessment, documenting the tasks performed, functional abilities and work tolerance, strengths and abilities, support needs, and likes and dislikes. At the work site, the customer completes work tasks, tours the work site, observes employees performing tasks, and/or conducts informational interviews with staff.

After the CPA is completed, the CPA evaluator documents all results on VR1630, Career Planning Assessment.

The VR counselor reviews the CPA and determines the next steps needed for the customer to achieve competitive integrated employment. The assessment may be reviewed with the CPA evaluator, the VR counselor, and the customer during a subsequent meeting (for example, during the Supported Employment Plan meeting).

## 4.6.3 Career Planning Assessment Outcomes Required for Payment:

The CPA evaluator:

* completes a minimum of three hours of home and community exploration;
* completes a minimum of six hours of career exploration and work skills assessment; and
* documents all information required in the service description and process and procedures on VR1630.

Payment is made upon receipt of:

* a signed, complete, and accurate VR1630; and
* an invoice.

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# 4.7 Employment Assessments Fee Schedule

A provider may not collect money from a VR customer or the customer's family in excess of VR service fees for any service charged. If VR services and another resource are used to pay for a service for a customer, the total payment must not exceed the fee specified in the VR Standards for Providers manual.

Each employment assessment below must only be purchased one time per customer.

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| **Employment Assessments** | **Unit Rate** | **Comment** |
| Vocational Evaluation | $288 per day | * Minimum hours per day is two, with no more than six hours
* Maximum payment allowed is $1,440
* Incomplete assessments with the report are paid at $48 per hour, when [VR3472, Contracted Service Modification Request for Vocational Assessments](https://www.twc.texas.gov/forms/index.html), is approved by the VR division director
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| Vocational Evaluation—Situational Assessments and Work Samples | $864 | * Paid only upon receipt of a complete report, with all deliverables addressed
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| Environmental Work Assessment | $1,213  | * Paid only upon receipt of a complete report, with all deliverables addressed
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| Career Planning Assessment | $1,194 | * Paid only upon receipt of a complete report, with all deliverables addressed
 |
| Prorated Career Planning Assessment | $643 | * Paid only when EWA has been completed and paid
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