# PART C, CHAPTER 12.1.a:CAREER PLANNING ASSESSMENTS (CPA)

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| **Policy Number** | **Authority** | **Scope**  | **Effective Date** |
| Part C, Chapter 12.1.a | 34 CFR [§361.48(b)(12)](https://www.ecfr.gov/current/title-34/part-361#p-361.48(b)(12)), and TWC Rule [§856.49](https://texreg.sos.state.tx.us/public/readtac%24ext.TacPage?sl=R&app=9&p_dir=&p_rloc=&p_tloc=&p_ploc=&pg=1&p_tac=&ti=40&pt=20&ch=856&rl=49) | All TWC-VR staff | 9/3/2024 |

## PURPOSE

In accordance with the authority (Federal and State) listed above, this policy is issued by the Texas Workforce Commission Vocational Rehabilitation Division (TWC-VR). Adherence to these rules and regulations issued under the Rehabilitation Act of 1973, as amended by Title IV of the Workforce Innovation and Opportunity Act (WIOA), supports Texans with disabilities in gaining, maintaining, and advancing in competitive integrated employment (CIE).

Specifically, the purpose of this policy and these procedures is to ensure adherence to the provision of Career Planning Assessments.

## DEFINITIONS

Bilateral Contractor: A service contractor that agrees to specific duties or deliverables under the terms of a contract with TWC-VR.

Informed Choice: The means by which a customer chooses their rehabilitation path, from options based on their needs and circumstances and the TWC-VR rules, as it relates to choosing employment assessment services and the providers of those services.

Trial Work Experience (TWE): Exploration of an individual's abilities, capabilities, and capacity to perform in realistic work situations in order to determine whether or not there is clear and convincing evidence to support a determination that an individual with a disability is incapable of benefiting from VR services in terms of an employment outcome.

## POLICY

### General Overview

The Career Planning Assessment (CPA) is a functional assessment designed to evaluate the customer's skills related to home and community, including volunteer and work activities to determine support needs and provide information needed to plan for future employment.

### CPA Parameters

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.

CPA**—**

* Is purchased from a bilateral contractor.
* Is conducted by an evaluator who has the Supported Employment credential;
* Can only be purchased one time per customer for the life of the VR case;
* Cannot be purchased when a vocational evaluation was previously purchased;
* Can be purchased at a prorated amount after an Environmental Work Assessment (EWA) has been completed and it is determined the work assessments do not need to be completed again;
* A prerequisite for any customer receiving Supported Employment (SE) services;
* Includes interviews with the customer and their circle of support that may be done in person or remotely;
* Includes in-person observations and assessments of the customer's skills and abilities in the homes, community, and integrated work environment;
* Work assessments must align with the customer’s interests and allow for an assessment of their abilities and skills.

### Standards for Providers (SFP)

The SFP manual focuses on the business practices, processes, and policies that TWC-VR and the contracted provider must follow. This VRSM chapter includes services that are provided by a contractor. For additional information regarding contractor responsibilities, service descriptions and costs, please refer to the SFP Chapter 4: Employment Assessments.

### Additional Policy Considerations

* Comparable Services and Benefits: CPAs are exempt from the requirement to secure comparable services and benefits prior to TWC-VR expending funds.
* Customer Participation in the Cost of Services: CPAs are exempt from applying Basic Living Requirements (BLR) and, therefore, the customer is not required to participate in the cost of services.
* Recipients of Social Security Disability Benefits: Recipients of Supplemental Security Income (SSI) or Social Security Disability Insurance (SSDI), due to the customer's disability, are exempt from the requirement to participate in the cost of TWC-VR services regardless of income.
* Exceptions to Policy: When necessary to meet the VR needs of a customer, TWC-VR staff members may request exceptions to policies and procedures through their chain of management up to the Deputy Division Director of Field Services Delivery, or designee. However, exceptions to policies and procedures based on Federal and State laws, statutes, and rules or regulations are not allowable.

## PROCEDURES

### Determining the Need for a CPA

TheVR Counselor and the customer may determine that a CPA is necessary to identify the customer’s interests, skills, and support needs for the customer to be placed in a competitive integrated employment and to establish an employment goal.

### CPA Referral and Service Provision

When the VR Counselor and customer agree to the receipt of CPA services, it must be included in the Individualized Plan for Employment (IPE), Trial Work Experience (TWE) plan, IPE amendment, or a Service Justification if prior to IPE development.

The VR Counselor must—

* Complete the Referral for Provider Services (VR5000);
* Provide documentation (only when relevant), such as medical or psychological reports, case notes, vocational testing, or employment data collected by TWC-VR staff;
* Ensure TWC-VR staff send the service authorization (SA) and VR5000;
* Monitor the customer's progress;
* Provide any needed instruction or intervention necessary to foster the customer's success;
* Review and approve the Career Planning Assessment (VR1630);
* Ensure that the invoice is paid.

The contractor must—

* Completes a minimum of three hours of home and community exploration;
* Completes a minimum of six hours of career exploration and work skills assessment;
* Develop recommendations based on information collected in the assessment activities related to future employment goals; and
* Document all information required on the VR1630.

### Customer's Satisfaction

The customer's satisfaction and service delivery is verified by the VR Counselor or by a TWC-VR staff member’s contact with the customer, documented in a case note.

### CPA Payment

Payment for CPA is made to the contractor when the VR Counselor approves a complete, accurate, signed, and dated—

* VR1630; and
* The invoice.

## APPROVALS & CONSULTATIONS

TWC-VR staff must follow the following approvals and consultations:

* *VR Director approval is required for any request to change requirements for Career Planning Assessment, using the Contracted Service Modification Request form (VR3472) prior to changes being implemented.*

**REVIEW**

The Policy Planning and Statewide Initiatives Team, or designee, is responsible for reviewing this policy and these procedures and will update the Document History log if necessary.

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| **Date** | **Type** | **Change Description** |
| 9/3/2024 | New | VRSM Policy and Procedure Rewrite |