Review Question	SCALE	Reviewer Score Rating	Reviewer Comments
Initial Interview			
1. Does the initial interview give a complete picture of the participant's barriers, strengths and interests?	**Excellent/ Satisfactory/ Unsatisfactory (E/S/U)**		
Disability			
2. Is the disability (or disabilities) identified on the Eligibility Determination data page supported by the 3rd party documentation in the file?	**Yes/No**		
3. Is the disability (or disabilities) identified in Eligibility Determination data page listed in the eligibility case note?	**Yes/No**		
4. Is the source of the disability diagnosis identified in the eligibility case note?	**Yes/No**		
5. Is the disability 'severe'?	**Yes/No N/A**		
Functional Limitations			
6. Considering the disability listed on the Eligibility Determination data page and the case file documentation of how this manifest for the participant, are the functional limitations identified on the Eligibility Determination data page supported?	**Yes/No**		

Review Question	SCALE	Reviewer Score Rating	Reviewer Comments
7. Does the case file documentation support the selection of each of the serious functional limitations that are identified on the Disability Priority data page?	**Yes/No**		
8. Does the narrative in the Eligibility case note support each of the serious functional limitations that are identified on the Disability Priority Page?	**Yes/No**		
9. If any of the functional limitation areas listed on the Disability Priority data page indicate "Other serious limitation," is there rationale provided in the text box?	**Yes/No N/A**		
10. Does the eligibility case note provide a narrative which describes how each of the functional limitations (listed on the Disability Priority data page) create a serious impact for the participant?	**Excellent/ Satisfactory/ Unsatisfactory (E/S/U)**		
Services			
11. Are the required services indicated on the Eligibility Determination data page, Disability Priority data page, and eligibility case note the same?	**Yes/No**		

Review Question	SCALE	Reviewer Score Rating	Reviewer Comments
12. Does the eligibility case note provide rationale for why chosen services are required for the individual to achieve an employment outcome?	**Yes/No**		
13. Is the rationale for required services identified in the eligibility case note clearly supported by other case file documentation? (e.g., initial interview, case notes, medical and psychological information)	**Yes/No**		
Timeline			
14. Does the Disability Priority data page provide rationale for the Estimated Months of VR Services?	**Yes/No**		
Overall			
15. Overall: Does the case file documentation support the level of priority assigned to this case? (i.e. disability, functional limitations, required services, time)	**Yes/No**		

Guidance for Scoring

1. **Does the initial interview give a complete picture of the participant's barriers, strengths and interests?**

    Excellent: Each section of the initial interview template is completed thoroughly, or a case note that is clearly labeled "Initial Interview" has been entered, with
    - specific and detailed information that contributes to the participant's overall story as it pertains to employment,
    - information which provides a holistic snapshot of the participant's situation during their first engagement with VR services,
    - evidence that the counselor elicited information regarding the participant's knowledge, skills, abilities and potential barriers to employment, and
    - there is information that shows a discussion relative to any potential ideas the participant has relating to their possible career goals or lack thereof.

    Satisfactory: Initial interview template is filled out thoroughly, or a case note that is clearly labeled "Initial Interview" exists in the case **and**
    - includes information that is relevant to the participants need for VR services and possible career goals, and
    - the information in each section helps to inform and support the participant's eligibility and need for VR services.

    Unsatisfactory: Case lacks information that helps to provide a clear picture of the participant's vocational goals and disability. E.g., answers do not provide a picture of where the participant is at relative to each of the initial interview template areas.

2. **Is the disability (or disabilities) identified on the <u>Eligibility Determination data page</u> supported by the 3rd party documentation in the file?**

    Yes: Each of the disabilities listed on the Eligibility Data page are supported by the attached 3rd party documentation, e.g., medical, psychological or Social Security documentation.

    No: One or more of the disabilities listed on the Eligibility Data Page are not supported by the attached 3rd party documentation, e.g., medical, psychological or Social Security documentation

3. **Is the disability (or disabilities) identified on the Eligibility Determination data page listed in the <u>Eligibility case note?</u>**

    Yes: The eligibility case note clearly identifies the disability or disabilities identified on the Eligibility Determination data page.

    No: One of more of the disabilities listed on the Eligibility Determination data page are not identified in the eligibility case note.

4. Is the source of the disability diagnosis identified in the eligibility case note?

Yes: The source of the disability diagnosis is identified in the eligibility case note.

No: There is no mention as to the source for one or more of the disability diagnoses that is included in the eligibility case note.

5. **Is the disability 'severe'?**

Yes: Either one or more of the disabilities the participant has documented is identified as one of the disabilities that is listed as severe (per list in AWARE on Disability Priority data page) OR if another disability or combination of disabilities is chosen then a clear rationale is provided which describes how that disability, or combination of disabilities, causes comparable substantial functional limitation in the text box.

No: While a checkbox indicating severe disability was chosen on the Disability Priority data page, the participant's disabilities are not one of the identified severe disabilities, and
- there is no justification, or
- the justification provided does not explain how the disability creates comparable substantial functional limitation.

N/A: This case was not identified as SD or MSD. The disability was not identified as severe.

6. **Considering the disability listed on the Eligibility Determination data page and the case file documentation of how this manifests for the participant, are the functional limitations identified on the Eligibility Determination data page supported?**

Yes: The functional limitations on the Eligibility Determination data page are consistent with the identified disability and are supported by documentation in the file, e.g., medical reports, psychological reports, initial interview on comprehensive assessment data page, and case notes.

No: The functional limitations are either not consistent with the identified disability, or there is no documentation in the file to support the functional limitation(s) identified.

7. Does the case file documentation support the selection of each of the serious functional limitations that are identified on the Disability Priority Page?

Yes: The documentation in the case file, e.g., medical reports, psychological reports, initial interview on comprehensive assessment data page, and case notes, supports each of serious functional limitations that are identified on the Disability Priority Page.

No: The documentation does not include sufficient information to support a determination that one or more of the functional limitations identified on the Disability Priority page are serious functional limitations for the participant.

8. Does the narrative in the Eligibility case note identify each of the functional limitations that are chosen on the Disability Priority data page?

Yes: The eligibility case note includes narrative which identifies each of the functional limitations identified on the Disability Priority data page.

No: The eligibility case note does not include one or more of the functional limitations identified on the Disability Priority page.

9. Does the eligibility case note provide a narrative which describes how each of the functional limitations (listed on the Disability Priority data page) rise to the level of <u>serious</u> impediment for the participant?

Excellent: The eligibility case note includes specific and detailed information that clearly shows the impact the disability has on the participant as serious. The case note clearly identifies the functional limitation area and the examples of impact on the participant. There is evidence that the counselor thoroughly analyzed the information available to make sound determinations.

Satisfactory: The eligibility case note information explains how the participant's disability interferes to create a serious impact for each of the identified functional limitation areas.

Unsatisfactory: The eligibility case note lacks information that helps to provide support for identifying the functional limitation(s) as serious or the case note reiterates the wording from the Disability Priority data page but does not demonstrate how the functional limitation manifests as serious for the participant.

10. If any of the functional limitation areas listed on the Disability Priority data page indicate "Other serious limitations," is there rationale provided in the textbox?

Yes: Other was chosen as an option in one or more of the functional limitations and the narrative box at the bottom of the page identifies the other serious functional limitation and includes the rationale to support the functional limitation as rising to the level of serious.

No: Other was chosen as an option in one or more of the functional limitations but the narrative box at the bottom of the page did not identify the other serious functional limitation or lacks the rationale to support the functional limitation as rising to the level of serious.

N/A: There was no "other" selected in any of the functional limitations on the Disability Priority data page.

11. **Are the required services indicated on the Eligibility Determination data page, Disability Priority data page, and eligibility case note the same?**

Yes: Services checked off on the Eligibility Determination data page are the same as the services checked off on the Disability Priority data page. The services checked off on the Eligibility Determination data page and the Disability Priority data page are also the services listed in the eligibility case note. All three locations identify the same services.

No: One or more of the services indicated on the Eligibility Determination data page, Disability Priority data page, and listed in the eligibility case note do not match or are missing.

12. **Does the eligibility case note provide rationale for why chosen services are required for the individual to achieve an employment outcome?**

Yes: The eligibility case note clearly describes why each of the services indicated are required for the individual to achieve an employment outcome.

No: The eligibility case note either
   - does not provide a clear reason for why one or more of the services identified are required to assist the participant to achieve an employment outcome, or
   - lists services that are not required in order for the participant to achieve a successful employment outcome.

13. **Is the rationale for the required services identified in the eligibility case note clearly supported by other case file documentation? (e.g., initial interview, case notes, medical and psychological information)**

Yes: There is information in the case file that supports the rationale provided for each of the identified required services.

No: The case file does not include sufficient information to support why one or more of the identified services are required in order for the participant to achieve an employment outcome, or no rationale exists in the eligibility case note for the services identified.

14. **Does the Disability Priority data page provide rationale for the Estimated Months of VR Services?**

Yes: Clear rationale for the estimated months of VR services is included on the Disability Priority page in the prompting text box.

No: The Disability Priority data page does not include sufficient rationale for the estimated months of VR services, or there was no information in the text box.

15. **Overall: Does the case file documentation support the level of priority assigned to this case? (i.e. disability, functional limitations, required services, time)**

Yes: The case file documentation is complete and adequately justifies the level of priority identified. The answer given to questions #1-14 were all answered "yes, satisfactory, excellent, or N/A."

No: The case file documentation does not adequately support one of more of the elements needed to justify the level of priority identified. One or more of the answers given to questions #1-14 were answered "no, or unsatisfactory."