NAVIGATE
Supported Employment and Education (SEE) Manual

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Clinician Manual

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The NAVIGATE Program for First Episode Psychosis
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Table of Contents

Supported Employment and Education (SEE) Manual

CHAPTER 1 WORK, SCHOOL, AND FIRST EPISODE PSYCHOSIS: AN INTRODUCTION TO SUPPORTED EMPLOYMENT AND EDUCATION........ 4
CHAPTER 2 PRINCIPLES AND LOGISTICS OF SUPPORTED EMPLOYMENT AND EDUCATION....... 12
CHAPTER 3 ENGAGEMENT, ORIENTATION, AND ASSESSMENT........ 33
CHAPTER 4 ADDRESSING ILLNESS-RELATED CHALLENGES TO WORK AND SCHOOL FUNCTIONING........ 42
CHAPTER 5 DISABILITY BENEFITS PROGRAMS........ 60
CHAPTER 6 DISCLOSURE DECISIONS........ 72
CHAPTER 7 CONDUCTING THE JOB SEARCH........ 82
CHAPTER 8 FOLLOW-ALONG JOB SUPPORTS........ 96
CHAPTER 9 THE SCHOOL SEARCH PROCESS........ 110
CHAPTER 10 FOLLOW-ALONG SCHOOL SUPPORTS........ 125
CHAPTER 11 SUPERVISION........ 140
REFERENCES........ 149
Appendix – Forms and Worksheets........ 151

Chapter 1
Work, School, and First Episode Psychosis: An Introduction to Supported Employment and Education

Please Read First:

NAVIGATE is a comprehensive intervention program for people who have experienced a first episode of psychosis. Treatment is provided by a team of mental health professionals who focus on helping people work toward personal goals and recovery. More broadly, the NAVIGATE program helps consumers navigate the road to recovery from an episode of psychosis, including supporting efforts to function well at home, on the job, at school, and in the social world. The NAVIGATE program includes four different treatments, each of which has a manual: NAVIGATE Psychopharmacological Treatment Manual, Supported Employment and Education, Individual Resiliency Training (IRT), and Family Education. There is also a Team Members' Guide that describes the overall NAVIGATE structure and how team members work together, and a manual for the Director of the NAVIGATE team.

The manual you are reading now describes the NAVIGATE Supported Employment and Education and how to implement it.

The experience of a first episode of psychosis frequently disrupts school or work performance, and starting or getting back on track with these roles is a common goal for both clients and their family members. Supported Employment and Education (SEE) is a program designed to help people with a psychiatric disorder achieve their vocational and educational goals (Bond, Drake, & Becker, 2008), including people who have had a recent episode of psychosis. In an SEE program an SEE specialist works with the client to identify his or her personal preferences regarding work and school goals, including career interests, and then provides the necessary supports to help the person achieve those goals. In contrast to traditional approaches to vocational rehabilitation for psychiatric disorders that emphasize extensive assessments and prevocational training, in SEE the focus is on a briefer Education and Career Inventory, followed by rapid job search or enrollment in an educational program, and then the provision of follow-along supports to ensure success. Also in contrast to many approaches of traditional vocational rehabilitation, SEE is fully integrated with all of the other clinical services the client is receiving from the NAVIGATE program, including pharmacological treatment, individual resiliency training, and family education.

SEE is designed to be an integral part of NAVIGATE, a comprehensive early treatment program for individuals who have experienced a first episode of psychosis. The NAVIGATE program is described in detail in the NAVIGATE Team Members' Guide, including each staff member's role:

- The Director, who also works with families and provides supervision to SEE specialists and Individual Resiliency Training (IRT) clinicians
- The Prescriber, who provides pharmacological treatment
- Two Individual Resiliency Training (IRT) clinicians, who help clients understand their disorder and how to manage it, and develop resiliency skills for achieving their personal goals
- The SEE specialist, who helps clients achieve their education and work goals

This chapter begins with some suggestions for preparing to work with SEE clients, followed by a review of the impact of psychosis on involvement in work and school and a discussion of some of the challenges of trying to return to work or school for clients who are recovering from a first episode of psychosis. Next, the importance of work and school to clients who have experienced an episode of psychosis is discussed, as well as the benefits to individuals of resuming their involvement in these roles. Finally, a brief summary of the SEE program is provided in order to give readers an overview of how the program works.

Preparing to Work with SEE Clients

To fully prepare to work with NAVIGATE clients, SEE specialists are encouraged to read this manual and become familiar with the handouts and forms provided in the Appendix. After reading each chapter and related materials, SEE specialists are encouraged to discuss them in supervision and to try out relevant skills in role plays with their supervisor or co-workers, or in some instance with non-NAVIGATE clients with whom they already work. For example, after reading chapter 3 (Engagement, Orientation, and Assessment), the SEE specialist can practice using the SEE Orientation Sheet and the SEE Education and Career Inventory in role plays with his or her supervisor or a colleague. After reading chapter 4 (Addressing illness-Related Challenges to Work and School Functioning), SEE specialists can practice teaching a coping strategy for cognitive difficulties to a client with whom he or she already works.

A thorough plan, schedule and checklist are included in the appendix titled "Learning SEE" for this chapter. The appendix presents three key learning components for new SEE specialists, including,

- Shadowing and Field Mentoring
- Using the SEE Team Manual and the NAVIGATE Team Members' Guide
- Taking part in suggested activities (e.g., practicing skills in role plays) for new SEE Specialists

The Effects of Psychosis on Work and School

There is great variability between individuals in how long it takes them to get treatment after they have first begun to experience psychotic symptoms. Some people experience intense distress from psychotic symptoms, and seek help quickly. Many others, however, keep their distress to themselves, or lack awareness and insight into the problems they are experiencing. When the psychosis begins to have an impact on the individual's school or work performance, however, family members and other people take notice, and treatment is often sought to understand and address the underlying problem. Therefore, for many individuals problems in school or work functioning result in the person's first involvement in treatment.

There are a number of reasons why a psychotic episode can interfere with school or work performance. *Hallucinations*, *delusions of reference* (such as believing that other people are talking about you when they aren't, or that the radio or TV is talking directly to you), and *paranoid thinking* or *delusions* can be worrisome and distracting, making it difficult to focus on school or work tasks. Psychotic distortions related to either delusions or misinterpreting social cues can lead to poor social judgment or the failure to perform critical work or school tasks, resulting in performance problems.

Other symptoms and impairments associated with psychosis can also interfere with school or work. *Depression* is a very common symptom in people with the first episode of psychosis, one which often precedes the frank onset of psychotic symptoms (Häfner, Löffler, Maurer, Hambrecht, & Ander Heiden, 1999), which can interfere with work or school performance. Negative symptoms such as *apathy*, *anhedonia* (lack of experience of pleasure), and *reduced energy or stamina* are common in first episode psychosis, and can impair functioning at work or school. Finally, *cognitive impairment* is common in people with the first episode of psychosis, which can interfere with effective performance at work or school. As a result of all of these problems, unemployment and drop-out from school are common problems in people with a first episode psychosis, as well as for those individuals who go on to develop schizophrenia or schizoaffective disorder.

Having psychotic symptoms can clearly have a major impact on an individual's ability to perform well at work or school. However, even after effective treatment has been provided and the major symptoms have been reduced or are in remission, a number of other factors can make returning to work or school challenging. Some of these factors are related to the nature of psychosis and the recovery process, while others are more related to attitudes and beliefs about mental illness held by the individual, his or her family, and society at large.

The experience of psychotic symptoms and the temporary loss of control over one's thinking and behavior can shake even the most confident person's sense of confidence in himself or herself. The person may naturally doubt that he or she is capable of returning to work or school, and feel overwhelmed by the challenge of coping with the experience, and what it means to the person and his or her future. Lack of self-confidence can be compounded by the stigmatizing and self-stigmatizing beliefs people often have about mental illness, such as the belief that having a mental illness, including a psychotic episode, makes it impossible for people to resume their lives and make a contribution to society. Alternately, the experience of psychosis can lead people to develop radically different and lower expectations of what they can accomplish in life, so that they may pursue school or vocational goals that are less ambitious and less personally meaningful to them.

In addition to having the inaccurate belief that people who have had a psychotic episode are unable to work or attend school, individuals (as well as their family members and even treatment providers) may believe that their ability to perform in these roles is very limited due to an high sensitivity to stress, and that a return to work or school is a goal that can be pursued in the long-term, but not in the short-term. Rather, they and others may believe that the immediate focus of treatment and rehabilitation should be solely on the stabilization of symptoms, the acceptance of having a mental illness, and learning illness self-management strategies, with attention turning to work or school only many months, or even years, later. The postponement of the search for work or re-involvement in school often robs individuals of their personal goals, and may lead to dependency and a passive stance towards life in general, fueled by the belief that the stress of working or attending school can tip the precarious balance the person has achieved, resulting in symptom relapses and hospitalizations. However, contrary to popular belief, people who have had an episode of psychosis are capable of returning to work or school, and can learn how to manage the stress that naturally accompanies many of life's most rewarding experiences (e.g., a challenging job, close relationships, having a family).

Although treatment of a first episode of psychosis can be effective in dramatically reducing or eliminating symptoms and associated impairments, some persistence in symptoms and associated impairments may nevertheless occur. For example, modest impairments in cognitive functioning are present at the first episode of psychosis, which are consistent over the course of several years following the first episode (Addington, Saeedi, & Addington, 2005), and can contribute to problems functioning at work or school. Negative symptoms such as anhedonia and apathy are often persistent following the stabilization of florid psychotic symptoms, which can pose a challenge to clients actively pursuing educational and vocational goals. Depression is also a common symptom following the treatment of a first episode of psychosis that can pose a problem to work and school functioning. Antipsychotic medications are effective in reducing or eliminating psychotic symptoms in most people with the first episode of psychosis, but some residual psychotic symptoms may nevertheless be present, which can interfere with functioning at work or school.

Another factor that can be a challenge for people returning to work or school after a psychotic episode is feeling embarrassed or self-conscious about things they did in those settings when they were experiencing psychotic symptoms. When people are experiencing psychotic symptoms their perceptions of themselves, others, and the world are often distorted. As a result of this, they may engage in strange, bizarre behaviors at work or school that in retrospect are a source of embarrassment, and which may make them reluctant to return. Even in the absence of psychotic behavior, difficulties performing well in school or at work can make people want to avoid being around others who saw them during their struggles.

One final factor that can be a disincentive for work after a first episode of psychosis is concern over the decision to apply for disability benefits, or the loss of disability benefits, including medical insurance or supplemental disability income, or the refusal of applications for such benefits if the person returns to work. Concerns about how involvement in work or school may affect individuals' disabilities benefits are common, both among people who have experienced a first episode of psychosis as well as their family members. Counseling individuals and family members about the rules governing work, school, and disability benefits is an important part of the SEE program.

The challenges of returning to work or school are summarized in Table 1.

Table 1 - Challenges of Returning to Work or School Following a First Episode of Psychosis

Symptoms and Impairments	• Hallucinations • Delusions (e.g., delusions of reference) • Paranoia • Negative symptoms (e.g., anhedonia, apathy, loss of energy or stamina) • Depression • Anxiety • Cognitive difficulties
Psychological Barriers	• Loss of self-confidence • Self-stigmatizing beliefs • Fear of stress • Embarrassment over past behavior in school or work situations
Social/Societal Obstacles	• Public stigma about mental illness and inability to work • Lack of support for work or school from family due to fear of relapses • Lack of support for work or school from treatment providers due to fear of relapses • Concerns about loss of benefits or health insurance related to obtaining work

The Importance of Work and School

Despite the challenges of returning to work or school for individuals who have experienced a first episode of psychosis, resumed involvement in these roles are common goals for clients and their family members. The choice of whether to return work, school, or both is often influenced by the individual's involvement in these activities before the onset of psychosis. In order to put the psychotic episode behind them, many people want to resume their lives and relationships after the setback of the psychosis.

Work is associated with a wide range of benefits for people with a mental illness, including people who are recovering from a first episode of psychosis. People who have experienced a first episode of psychosis often have limited incomes, and work, even part-time, can improve their financial standing. Another benefit of work is associated with the value attached to it by other people and the individuals themselves. People who work are, by definition, valued by others because they get paid for their efforts. Feeling valued has a positive effect on anyone who works, but it may be especially meaningful to someone who has had the setback of experiencing a first episode of psychosis. Knowing that others value one's efforts, and are willing to pay for their time and skills, helps people feel valued, and may also lead to people valuing themselves more. Obtaining work for people with a major mental illness is associated with improved self-esteem as getting paid for work provides tangible evidence that they are valued, which helps them think more highly of themselves (Torrey, Mueser, & Drake, 2000).

In addition to increased income, the social value placed on work, and self-esteem, work may have clinical benefits as well. Work has been shown to have modest effects on decreasing psychiatric symptoms in persons with a mental illness, such as depression and hearing voices (Bond et al., 2001; Mueser et al., 1997). Work gives people something to focus on rather than their own thoughts and problems, which can provide a welcome relief.

Work can also help to fill a void in a person's life when they are engaged in little other meaningful activity. Everybody needs to have something to do, and a personal sense of purpose, to give their life meaning and to structure their time. Lack of meaningful stimulation can lead to worse symptoms and relapses. Thus, work can provide people with that critical sense of purpose that may otherwise be missing.

Getting back to school can also produce a range of benefits. Higher levels of education can improve one's standing in the job market, especially if the individual is interested in establishing a specific career. Going to school and getting a degree can provide people with a sense of purpose and something to do that meaningfully occupies their time. Involvement in school can also provide important social opportunities, such as re-establishing friendships, making new friends, or getting involved in social groups with common interests (e.g., in the arts, social issues, politics).

Re-enrolling in school, and achieving one's educational goals, can also have important implications for the self-esteem of individuals who are recovering from an episode of psychosis. People who have experienced a first episode of psychosis and then drop out of school often feel inferior and hopeless when they compare themselves to their siblings who have continued in school and obtained their desired degrees (Lewine, 2005). Helping these individuals return to school may protect them from the demoralizing effects of feeling surpassed by their siblings and peers who have achieved important educational milestones.

The benefits of returning to work or school are summarized in Table 2.

Table 2 - The Benefits of Work or School Following an Episode of Psychosis

- Improved financial standing when working competitively.
- Increased self-esteem and self-confidence, and reduced self-stigma.
- Reduced social stigma that people with mental illness can't contribute to society.
- Ability to get better paying jobs by obtaining more education.
- Reduced demoralization when educational goals are achieved similar to individual's siblings.
- Ability to develop rewarding career by obtaining higher or specialty degrees.
- Engagement in meaningful activity that gives person a sense of purpose.
- Modest reductions in symptoms.
- Social opportunities.

Summary

Supported Employment and Education (SEE) is an individually tailored approach to helping people with recent onset of psychosis return to work, school, or both. The goals of SEE are determined by the client, including the nature of work that is sought, school programs to enroll in, and the types of support provided by the SEE specialist. Broadly speaking, the SEE program can be divided into three phases: assessment (Education and Career Inventory), job search or enrollment in school, and follow-along supports.

The *assessment phase (Education and Career Inventory)* is not focused on a formal evaluation of the client's skills or aptitude, but rather on gathering important information to develop a shared understanding of the individual, their employment or school history, and their preferences with respect to school, types of work, and career. The time devoted to the Education and Career Inventory is generally relatively limited, and frequently takes place over the first month following the client's enrollment in SEE. Of course, assessment is an ongoing process throughout all of SEE, so that additional information about clients' work or school interests and skills can be ascertained throughout their participation in the SEE program.

The *job search or school enrollment phase* is aimed at providing practical assistance to the client in finding the type of job or school program that he or she is interested in participating in. This phase is "action oriented" for both client and SEE specialist, and does not involve just sitting around and talking, but actually doing what needs to be done to land a job or enroll in a school program. Examples of common activities in this phase include completing job applications, practicing job interview skills, going on job interviews with client, applying for school programs, and meeting with a school counselor or administrator.

The final phase of SEE involves providing *follow-along supports* that are aimed at giving clients practical assistance to facilitate good performance, prevent crises from arising, and promote success at work or school. Follow-along supports may also involve helping the client, move onto another job or school program. Similar to the job search or school enrollment phase, the follow-on support phase is highly practical and "action oriented," with the SEE specialist providing a range of different supports to help the client achieve his or her educational or vocational goals. Examples of activities during this phase include on-the-job training or coaching, teaching the client better study skills, meeting with teachers or employers (with client permission) to discuss issues related to improving the client's performance, and assistance with locating or using transportation and managing money. In contrast to some traditional vocational rehabilitation programs, limitations are not imposed on the duration of time that clients can receive supports from their SEE specialist after they have obtained a job or are enrolled in school.

Finally, SEE does not operate in a vacuum, but rather is fully integrated with the person's other clinical services in the NAVIGATE program. Furthermore, significant others such as family members can play key role in helping clients achieve their vocational or educational goals, and thus they often collaborate in the SEE program by supporting their relative's pursuit of personal goals.

Chapter 2
Principles and Logistics of Supported Employment and Education

Supported Employment and Education (SEE) has its roots in the supported employment model of vocational rehabilitation for persons with severe mental illness, which was developed in the late 1980s and early 1990s. We provide a brief history of the evolution of the supported employment model in order to put the SEE model in its proper context. Following this historical review, we will state the principles of the SEE model, as informed by the original supported employment model.

History of Supported Employment for Severe Mental Illness

The development of the supported employment model for severe mental illness was informed by two historical trends in rehabilitation. First, in the field of developmental disabilities, there was widespread disappointment with the results of vocational rehabilitation models designed to first train requisite work and interpersonal skills in order to prepare individuals for competitive employment. Rehabilitation approaches that focus on first training new skills, and then placing people in competitive jobs became known as *train-place* vocational rehabilitation models. For people with developmental disabilities, the “training” component of the train-place style programs often took place in sheltered workshops in which individuals were paid sub-minimum wages and worked alongside other persons with similar disabilities. Although the workshops were intended to provide training opportunities to prepare individuals for competitive employment, few people ever moved on to such jobs in the community, with the vast majority spending their working lives in sheltered workshops.

To address the growing push for the integration of persons with developmental disabilities into the workforce and into society at large, and because of the apparent failure of the train-place approach to help people secure competitive jobs, an alternative approach to vocational rehabilitation was developed based on the opposite of the train-place philosophy: the *place-train* approach. In this approach, emphasis is first placed on helping the individual secure a competitive job in the community, while providing the supports necessary to learn, perform, and retain the job. The place-train approach became known as *supported employment*, and was shown to be both feasible and effective at helping individuals with developmental disabilities work at competitive jobs in integrated settings in the community (Wehman, 1981; Wehman & Moon, 1988).

A second influence on the supported employment model for persons with severe mental illness was the Assertive Community Treatment (ACT) model for severe mental illness, originally developed in Madison Wisconsin (Stein & Santos, 1998). The ACT model was developed in response to a subset of persons with severe mental illness who failed to utilize community-based psychiatric services, and who were thus prone to frequent relapses, rehospitalizations, and emergency room visits. In order to address the needs of these challenging clients, the ACT program was developed, guided by the central philosophy that if the client would not come to the mental health center for the treatment, the ACT team would bring the treatment to them, in their natural settings in the community.

The ACT model functions by having an interdisciplinary treatment team that assumes full responsibility for a group of clients with severe mental illness, with most services provided in the community rather than at the mental health center. ACT teams operate with shared caseloads and with more intensive staffing, such as a 1:10 staff member to client ratio, as opposed to traditional case management in which a ratio of 1:25 staff member to clients or higher is common. ACT teams provide a wide range of services to people on their teams, such as visits by a nurse member of the team, monitoring of symptoms and medication adherence, and counseling and rehabilitation. ACT teams also provide a host of practical supports for basic needs such as housing, medical attention, and shopping. Research on ACT has shown that it is effective at reducing psychiatric hospitalizations, stabilizing housing in the community, reducing symptom severity, and improving satisfaction and quality of life (Bond, Drake, Mueser, & Latimer, 2001). The ACT model demonstrated that outreach into the community and the provision of practical supports were effective strategies for engaging and retaining clients in treatment.

In the early 1990s, a model of supported employment for persons with severe mental illness was developed by Becker and Drake (Becker & Drake, 1993), drawing from the lessons learned in the developmental disabilities field, and the success of the ACT model at engaging challenging clients in treatment and helping them stabilize their lives. Following the basic approach of supported employment for people with developmental disabilities, the supported employment model for persons with severe mental illness developed by Becker and Drake emphasizes a place-train approach to helping clients obtain competitive work in integrated community settings as soon as possible after joining the program, with the provision of training and other supports as needed after a job has been successfully obtained. An additional feature that was added to the supported employment model for persons with severe mental illness is that vocational services are closely integrated with clinical services that the client is receiving, preferably at the level of the employment specialist serving as a regular member of the client's treatment team. Close coordination between clinical care and supported employment was deemed important in order to ensure that the entire treatment team supports the client's vocational goals, and to ensure good communication between clinical and vocational service providers regarding issues such as symptoms and medication side effects.

The supported employment model developed by Becker and Drake drew from the ACT model in recognizing the value of providing psychiatric rehabilitation services in natural community settings. In supported employment for persons with severe mental illness, this influence is reflected by an emphasis on providing most vocational services in the community rather than at the mental health center. While meetings between employment specialists and clients occasionally take place at the mental health center, most contacts occur in community settings, such as the client's home, a coffee shop, or at the person's place of employment. The emphasis on providing services in the community conveys to clients and employment specialists alike that the task of finding and keeping employment is one that fundamentally must take place in the community and not in the office. Therefore, if the goal of supported employment really is to help people get and keep jobs, most of the time spent between the employment specialist and the client should be in the community.

The principles of supported employment have been standardized (Becker & Drake, 1993; Becker & Drake, 2003) and studied in multiple controlled trials (Bond et al., 2008). More recently, these principles have been adapted for people who have just experienced a first episode of psychosis (Killackey, Jackson, & McGorry, 2008; Nuechterlein et al., 2008), and have added the goal of helping clients continue their studies because of the special relevance of educational attainment in this population, as described in Chapter 1. In the next section we describe logistical aspects of providing SEE, followed by a description of the principles that govern SEE.

The Principles of Supported Employment and Education

The principles of SEE, adapted from the principles of supported employment (Becker & Drake, 2003), are described below.

Principles of Supported Employment and Education (SEE)

1. All clients in the NAVIGATE program can participate in the SEE Program
2. SEE and clinical services are integrated on the NAVIGATE team
3. SEE focuses on competitive work when work is the goal, and integrated education when school is the goal
4. Comprehensive assessment
5. Respect for clients' personal preferences
6. Benefits counseling
7. Rapid job or school search begins after enrollment in SEE Program
8. Follow-along supports are provided after attaining a job or enrolling in school

1. All Clients in the NAVIGATE Program Can Participate in the SEE Program

No one can accurately predict which individuals with a first episode of psychosis will be successful in returning to work or school when they are provided with the necessary supports. Many individuals with persistent symptoms or cognitive difficulties are nevertheless able to achieve their work or educational goals. For these reasons, preconditions or eligibility criteria, such as adherence to medication, stable psychiatric symptoms, or the absence of cognitive impairment, are not a requirement for participation in SEE. If the client's symptoms appear to be temporarily exacerbated, a consensus may be reached, including the client's preferences, to temporarily suspend

SEE services, but formal eligibility criteria for participation in SEE are not imposed on clients.

All NAVIGATE team members, especially the SEE specialist, are challenged to suspend their preconceptions or beliefs regarding the necessary attributes that clients with a first episode of psychosis need in order to return to work or school. Rather than attempting to focus on who will or will not be successful, the NAVIGATE team is called on to focus on how they can help each client find and make progress towards his or her personal career goals. In order to build a sense of motivation and hope for people experiencing a first episode of psychosis, and their families, it is critical for all NAVIGATE team members to develop the belief that all clients are capable of returning to work or school. If the NAVIGATE team members believe in each client's inherent ability to recover, they will be successful in conveying their sense of hope to clients and their family members.

Another important fact supporting this principle is that many people who have had a first episode of psychosis continue to have significant strengths and abilities that will help them to be successful in their field of interest. Focusing more on symptoms and other aspects of psychopathology, rather than on a client's strengths and abilities, can distort the picture of the individual's true potential for returning to work or school. Helping clients become aware of their strengths and talents, and making members of the NAVIGATE team aware of them, will both build optimism and inform the process of helping the client return to work or school.

SEE specialists work with clients at all stages of their career readiness, ranging from clients who are ready to start school or work tomorrow, to those who have concerns about their career paths, or feel ambivalent about their future altogether. As discussed earlier, many clients have the hope or dream of gaining employment or finishing their degree, but their experience with a psychosis may have clouded their dream with fears and concern about their ability to achieve those important goals. The SEE specialist works with these clients to explore their fears and uncertainties, to work through their ambivalence, and to instill hope and confidence that change is possible by working together. The SEE specialist also helps to normalize the ambivalence that clients experience about returning to work or school, and helps them develop strategies to work through that ambivalence and to develop personal confidence by tapping into the wide range of available resources, including personal resources such as strengths, family support, community resources, treatment resources, and education and information about the management of their psychiatric disorder.

After a client has enrolled in the SEE program, the presence of symptoms and other illness-related problems does not signal the need for a delay in the process of looking for appropriate work or school. Rather, with these individuals the focus of attention is not only on identifying whether the client is getting the treatment he or she needs, including medication, but also on developing strategies for coping with symptoms, cognitive difficulties, and other illness-related challenges, in order to perform as well as possible on the job or at school. Helping clients learn how to cope with illness related problems, or improving pharmacological treatment of those problems, is often a source of collaborative work between the SEE specialist and the other members of the NAVIGATE team.

All NAVIGATE clients should be offered the chance to meet with the SEE specialist (preferably within two weeks of enrolling in NAVIGATE), even if they are unsure or ambivalent about pursuing employment or education goals in the short term. For clients who meet with the SEE specialist and do not want to initially participate in SEE services, the SEE specialist should let them know that they may ask to start SEE services at any point if they change their minds and ask permission to check back with them in a couple of months

Case Example

> *"Randall" is receiving SEE services, and has identified an interest in the fields of heating, ventilation, and air conditioning. Randall graduated from an alternative high school program that provided limited coursework and training in his field of interest. He did participate in an internship in a related field following graduation from his high school. Shortly after completing the internship Randall experienced a psychotic episode, received treatment, and enrolled in NAVIGATE. During the first few meetings with Randall, both the SEE specialist and Individual Resiliency Training (IRT) clinician learned that Randall continues to experience significant symptoms, despite having started antipsychotic medications several weeks ago. Specifically, Randall reported hearing voices that tell him he is worthless and that it would be best for everyone if he just disappeared. Despite the content of the voices, a suicide assessment indicated that Randall did not pose a significant suicide risk at this point. When talking with Randall about those voices, the IRT clinician learned from him that his voices are much more intense when he is exposed to loud background noise. The IRT clinician began teaching Randall effective strategies for coping with his voices, including reducing his exposure to noise, using headphones to distract himself from listening to the voices, and positive self-talk in response to voices when he is unable to distract himself. Randall described these strategies as effective at reducing distress and distraction related to the voices. In working with Randall on his career profile, the SEE specialist incorporated the new information about Randall's coping skills for dealing with hallucinations. Randall and the SEE specialist began to explore possible jobs in his field of interest which would minimize his exposure to loud machines such as oversized compressors or ventilation fans running.*

2. SEE and Clinical Services are Integrated on the NAVIGATE Team

SEE services are most effective when they are fully integrated with the clinical services the client is receiving for his or her psychiatric disorder. Integration of vocational and clinical services is defined as regular meetings between the SEE specialist and other treatment providers for the client. In NAVIGATE, there are multiple opportunities for integrating vocational and clinical work through regular NAVIGATE team meetings that include the SEE specialist as a member of the team.

There are several reasons why the integration of vocational and clinical services leads to better outcomes than when services are provided by separate agencies that typically have limited coordination. First, having the SEE specialist function as a member of the NAVIGATE team assures that the client's work and school goals are understood by the team as an important focus of treatment. This minimizes the possibility of attention to these goals being postponed in order to first address what may be perceived as more important clinical issues, such as medication adherence, substance abuse, or psychotic symptoms.

Second, the SEE specialist is often privy to important information about the client's functioning in the community that other NAVIGATE team members may not be aware of. Since the SEE specialist spends time in the community with the client, interacting with prospective employers or educators, he or she has a unique opportunity to see how the client functions in "real-world" settings outside of the mental health center. The SEE specialist may become aware of medication side effects, problematic symptoms, or inconsistent adherence to medication over the course of providing job or school supports, and these concerns can be brought to the NAVIGATE team for discussion and resolution. For example, the client may stop taking medication regularly because of its sedating side effects. If this is discovered sufficiently quickly after starting a job or school by the SEE specialist, or inquiries in advance identify it as a potential problem, a change in the client's medication regimen (e.g., when medication is taken) could reduce the sedation, facilitate medication adherence, and promote better work or school performance while minimizing the chances of a relapse. Similarly, the SEE specialist may become aware of symptoms that are interfering with the job or school search process, or performance at school or work. Discussion of these problems with the NAVIGATE team could lead to the IRT clinician working with the client in order to teach more effective coping skills for minimizing the negative effects of those symptoms, as in the case of Yvonne described above.

Third, integrating clinical and vocational services has the added advantage of providing more feedback and potential job or school leads to the client and SEE specialist from the other NAVIGATE team members. When it comes to finding a job or enrolling in a school program, often two (or more) heads are better than one; therefore getting the whole NAVIGATE team on board with the importance of a client's specific school or work interests may lead to the brainstorming of more possible options for helping the client achieve his or her personal goals.

Case Example

> *When "Wesley" started the NAVIGATE program, he met with his SEE specialist and received information about the SEE program. Wesley chose to work on his educational goals first, which began with obtaining a GED, because he had not yet completed high school. In the next meeting of the NAVIGATE team, the SEE*

specialist updated all of the team members on Wesley's progress towards his current career goals, including the next step of getting a GED. While this may seem like a small bit of information to the team, it is important to consider how regular communication among NAVIGATE team members regarding Wesley's progress towards his educational goals can lead to strong support from the whole team. When services are not integrated, and other members of the client's treatment team are not aware of the individual's vocational or educational goals, they may miss opportunities to support the person's efforts to achieve their goals, or inadvertently discourage them from pursuing their goals. For example, one clinician could tell Wesley that it is good that he is taking a break from school until he has a chance to get the symptoms of his mental illness under better control. A simple statement such as this could cause Wesley to wonder whether his goal of obtaining a GED this year is realistic, leading to ambivalence about his decision to return to school. Similarly, another team member could tell Wesley that it is good that he is not working or going to school until he has established that he has a disability that makes him eligible for SSDI benefits. Wesley might feel confused and wonder whether he should suspend any thoughts of obtaining a GED this year because he has a disability and he should instead be planning for his disability income rather than his education.

3. SEE Focuses on Competitive Work When Work is the Goal, and on Integrated Education when School is the Goal

People with major mental illness are often told that they are not capable of working competitive jobs, and for years clients who were interested in work had few alternatives to sheltered workshops paying below minimum wages, populated by other people with disabilities, and little chance for advancement. These jobs held no future for clients, and provided little opportunity for social integration in the community. Finally, it is worth remembering that mental health clients express a clear preference for competitive jobs in integrated community settings (Provencher, Gregg, Mead, & Mueser, 2002). People with mental illnesses were also thought of as having lower intelligence or ability to do well in education, and for years clients were discouraged from furthering their education in schools, classrooms and colleges.

There is ample support that despite the common belief that people with a first episode of psychosis cannot withstand the pressures of competitive work or school as they are recovering, with appropriate supports success in these areas is possible (Killackey et al., 2008). In accordance with the preferences for people in SEE who are interested in work, the focus of SEE is on helping them find jobs. In deciding to do this, the client's individual goals and preferences are once again established and honored.

Clients may have their own misconceptions about competitive employment or education. For example, they may believe that only people who want to work full-time should apply for competitive jobs, or that they cannot earn enough money through competitive employment to support themselves. Additionally, clients may believe that they will not be able to obtain competitive employment if they have the mental illness or if they let a potential employer know about their mental illness. When clients are presented with accurate information about these misconceptions, they are often able to better develop their employment goals, and to determine the most effective ways of pursuing them.

4. Comprehensive Assessment

A comprehensive assessment conducted at the beginning of the SEE program, and updated throughout, is critical to establishing the client's goals for the program and the effective delivery of SEE services for all phases of the employment and education process. Comprehensive assessment includes an understanding of clients' strengths that can be critical to helping them achieve their personal goals. Strengths may include personal attributes (e.g., hard-working, sense of humor, openness to trying new things), skills (e.g., work related, computers, playing a musical instrument, being a good conversationalist), or resources (e.g., supportive family or friends). A comprehensive assessment also includes a review of the client's work history, including job losses and reasons for job losses, as well as educational experiences, including any difficulties experienced.

The client's educational and work goals are also elicited, explored, and sometimes developed during the assessment. Efforts that the client has made towards achieving goals are noted, as well as any barriers the client has encountered. Not all clients in the NAVIGATE program have goals at the beginning of their participation in SEE. It is assumed that for these clients, goals will gradually develop over the course of working with the SEE specialist.

Understanding the client's clinical functioning (e.g., symptoms, cognitive difficulties, medication and side effects) and social supports (family support, friends) is an important part of comprehensive assessment. While the SEE specialist may obtain some information about the client's functioning in these areas during the assessment for the SEE program, even more information will usually be available from other NAVIGATE team members as well as family members or other supporters in the client's life with the client's consent.

The initial assessment is usually conducted over the course of several meetings following the orientation to the SEE program. It is especially useful if at least one meeting can take place in the client's home, as pertinent information can be gleaned from that setting. Although a comprehensive assessment may require several weeks to complete, it should not delay the search for work or school placement beyond one month after joining the program for most clients (see Rapid Job or School Search principle below). Assessment continues to be performed even after beginning the job or school search, or stating work or school.

Last, comprehensive assessment should be conducted not only at the beginning of the client's participation in the SEE program, but also throughout the entire program. For example, when the client gets a job or begins a school program, additional assessment may be necessary to determine what supports the client may need to succeed. In addition, in some circumstances it may be desirable to set aside time to reevaluate the client's goals for participating in a SEE program as those goals may have changed. This may occur in a variety of circumstances, including when the client has achieved his or her goal and new goals may need to be set, when the client has had difficulty achieving the goal despite significant effort towards it, and when the client appears to not be invested in achieving the goal (e.g., lacks follow-through on even small steps towards the goal) and alternative goals may need to be explored.

5. Respect for Clients' Personal Preferences

People with psychiatric illness are often told what types of work or education would best suit them. All too often, they have been given little choice as to the type of jobs where they can work, the hours they can work, and their potential for advancement in the job. With respect to education, people are often directed to participate in programs that are strictly for people with disabilities, where they frequently are exposed to unchallenging curriculum and a lack of inspiration to live up to their academic potential. In short, clients' personal preferences regarding school and work have frequently been ignored or invalidated.

In the SEE program, clients determine their own long-term educational or employment goals, and the steps (objectives or short-term goals) to achieve those goals. In addition, clients' preferences for how those goals will be achieved are respected by the SEE specialist. Respecting the personal preferences of clients in terms of the type of job desired, the work hours, the degree of social contact, or the nature of the educational program that the person wants to enroll in, are important principles in SEE.

Case Example

"Trudy" is interested in working in women's clothing and fashion. The SEE specialist works with Trudy to explore her preferences regarding the specific types of work she would like to do in the women's fashion business. The SEE specialist helps Trudy sort through the different options related to working in the fashion business. For example, Trudy may want to work in sales, design, inventory management, stocking clothing racks, or setting up clothing displays. She may want limited contact with the public, or she may prefer to have lots of contact with potential customers. Trudy may want to work only a few hours a week or half time for even more. Trudy may want to work as part of a team on her job, or more independently at the workplace. Understanding the specific preferences that Trudy has for the type of job, what she would like to be doing, and the hours, are critical to providing effective SEE services.

Research has shown that when clients in supported employment obtain jobs that match their vocational interests, the amount of time that they work is approximately twice as long as people who obtain jobs that do not match their vocational interests (Becker, Drake, Farabaugh, & Bond, 1996; Mueser, Becker, & Wolfe, 2001).

Clients in SEE services exercise choices regarding their preferences for how to conduct a job or school search. Some clients decide that it is best to have their SEE specialist initially make in-person contact with a potential educator or employer on their behalf. For these clients, this approach is the most comfortable. Other clients decide that they do not want a potential educator or employer to know that they are receiving SEE services, and they do not want their SEE specialist to have any contact with these individuals. These clients feel most comfortable approaching employers or school personnel alone, and receiving behind the scenes support from their SEE specialist.

Throughout the course of SEE services, clients may change their preferences about how to use "disclosure." A client may initially decide to search for jobs or schools without having the SEE specialist make any contacts with employers or educators and then may change their mind after three months. Clients may secure a job or start an education program, having made all the contacts on their own, and then change his or her mind about disclosure when they need assistance from the SEE specialist to resolve a complicated situation at work or school.

6. Benefits Counseling

All participants in SEE need to have accurate information about employment income, educational costs, or managing benefits when financial planning. People make better decisions about their employment or their educational future when they have more accurate information about their choices, potential outcomes, and the implications of their decisions. Few people would take a new job, or a similar job, all things being equal, if the new job paid less money or did not provide any kind of health insurance. This is a dilemma similar to the one encountered by many people with the first episode of psychosis when they consider starting work.

Some clients in the NAVIGATE program may still be in the process of thinking about whether to apply for income and or health assistance programs, while others may have started to receive these types of benefits, while others may already be receiving benefits. Still other clients may want to avoid applying for or participating in benefits programs completely. All of these choices may have advantages and disadvantages to them, and often there is no perfect choice for clients regarding whether or not to apply to benefits programs and if so, which ones.

For the purposes of the NAVIGATE program, we define benefits counseling as helping individuals and their family members or other supporters (included with the permission of the client) to make their own decisions about what role, if any, the use of disability benefits will play in helping clients to achieve their career goals related to employment and education. This assistance includes providing clients with accurate information about the types of disability benefit programs that exist on federal, state and local levels, the eligibility and application processes for these programs, and information about work incentive programs and other options for people who receive benefits. This information is based on each individual client's unique circumstances and customized to their situation.

Some of the common benefits programs that clients may encounter include *Social Security Disability Insurance* (SSDI), *Supplemental Security Income* (SSI), *Medicare* (federally-based health insurance), *Medicaid* (state health insurance), *state-based income programs* (a variety of names), and *housing assistance programs* (e.g., Section 8). It is important for SEE specialists to have a basic working knowledge about all these programs, and especially the work incentive provisions for these programs.

People with a severe mental illness who receive benefits may have fears and concerns about losing their benefits, or working and ending up with less monthly income, which can serve as a powerful disincentive to seeking competitive employment or involvement in educational programs. Helping clients and family members access information about work incentives and educational incentive programs can provide critical benefits. Once again, as in establishing work or school goals and preferences, the client is the key decision-maker about applying for benefits, while the role of the SEE specialist, along with other members of the NAVIGATE team, is to help the client obtain accurate information to assist him or her in this decision. As decisions about applying for benefits can have broad implications not just for the client, but also for family members and for the reimbursement of services provided by the NAVIGATE team, the decision to apply for benefits is one that needs to be made in a shared decision-making framework that involves the whole treatment team, the client, and if appropriate family members or other significant persons.

7. Rapid Job or School Search Begins After Enrollment in SEE Program

Traditional vocational rehabilitation programs have often required an extensive period of time for conducting in-depth situational assessments and prevocational skills training. SEE focuses on helping people obtain jobs and enroll in school programs as soon as possible after joining the program. Research has shown that more rapid job-search is associated with better long-term work outcomes than when job search and attainment are delayed (Bond, Dietzen, McGrew, & Miller, 1995).

Early on in the client's participation in the SEE program it is useful for the specialist to find out *when* the individual would like to achieve his or her work or educational goals and objectives. Regarding educational goals the client may have, discussion should address how the timing of courses and enrollment in specific education programs will affect the length of time required to achieve educational goals and objectives. If the client expresses a desire to postpone the search for work or getting back into school for a significant period, the SEE specialist explores this preference, seeks to understand the concerns the client may have, and addresses them when possible.

Case Example

> *"Samuel" had his first psychotic episode when he was 18 years old, in the middle of his senior year in high school. Although Sam's parents noticed something seemed to be troubling him when his grades declined during the first quarter and he started avoiding people, and talking strangely, it still took a couple of months to get him into treatment at the NAVIGATE program, by which time he had dropped out of high school. When Sam's symptoms had been stabilized, he indicated that he was interested in returning to school, but was worried about returning too soon because of concerns about his ability to handle the stress of school and the possibility of having a relapse of his psychotic symptoms. The SEE specialist normalized Sam's concerns, and assured him that they would work together towards his goals in a manner and pace that he felt comfortable with. He also informed Sam that several parts of NAVIGATE could help address his concerns. Specifically, regularly taking prescribed medication can prevent relapses of psychotic symptoms. In addition, a personalized relapse prevention program will be created for Sam in either the Family Education program or the Individual Resiliency Training (IRT) program (or a combination of the two). Sam will also be taught specific strategies for managing stress, including coping with any persistent symptoms, in the IRT program. All of these treatment strategies will enable Sam to build his resiliency and cope effectively with the inherent stress associated with pursuing normal, healthy, challenging, and personally meaningful goals.*

With respect to employment, a general recommended timeframe for initiating the job-search is that most clients are expected to begin having face-to-face contact with potential employers in their communities within 30 days of starting SEE services. This is a guideline, and not a hard and fast rule. Some clients may already be interviewing for jobs when they start SEE services, while others may need more time to develop their specific goals and preferences, or to work through their ambivalence about employment.

The purpose of the 30 day guideline is to establish a reasonable time for the SEE specialist to stay on track and not contribute to delaying the job-search for clients who are genuinely interested in obtaining work or finding an appropriate school program. Clients may delay looking for a job or enrolling in school because of their fear of rejection, lack of belief in their ability to get a job or do well in school, or embarrassment about problems at work or school during the height of the episode. Helping clients prepare for job interviews, and having some direct experience interacting with prospective employers or teachers, can often help to correct the negative beliefs some clients may have about work or school. On the other hand, if the search for a job or school is postponed, it can reinforce the person's negative beliefs.

Attempting to commence looking for jobs or re-enrolling in school early on during SEE can have the advantage of helping the SEE specialist identify and challenge negative thoughts and beliefs that the client may have about his or her prospects of landing a job, keeping a job, or being able to meet the demands of school. The SEE specialist may be able to directly challenge the client's inaccurate, negative, self-stigmatizing beliefs about his or her ability to return to work or school, and support his or her self-efficacy. The SEE specialist should also coordinate efforts with the client's IRT clinician, who can address self-stigmatizing and self-defeating beliefs that often occur following a psychotic episode in the IRT module "Processing the Psychotic Episode."

One of the most important reasons for initiating the job-search or educational placement as soon as possible after the client joins the SEE program is that motivation to work or return to school are often highest during the early period of recovery from a psychotic episode, when the individual is attempting to resume his or her life as soon as possible. Since clients' motivation to work or attend school may fluctuate over time, providing work or school-oriented services aimed at helping them achieve their goals when they want them can capitalize on this motivation.

8. Follow-along Supports Are Provided After Attaining a Job or Enrolling in School

Many vocational programs focus primarily on helping people with a disability obtain employment, with less attention to what happens after the job start. In these programs, after a job has been obtained, some supportive services may be provided for a limited period of time, which are eventually stopped, with the case being closed as "successful." This may be a useful practice for people with disabilities that are relatively static in nature (e.g., a person who has lost a limb), but fails to address the needs of people with a psychiatric disability, for whom symptoms and impairments often fluctuate over time. Given that both the symptoms of mental illness and the course of recovery are nonlinear in nature, it is important that vocational and educational services help people not only get started in jobs or educational programs, but also provide the supports necessary to enable them sustain progress and succeed in those programs.

The SEE specialist is the key person responsible for providing ongoing follow-along educational or environmental supports to clients. The nature of follow-along supports, as with all SEE services, is that they are individualized and adjusted to fit client's goals, preferences, and challenges. In both the educational and employment areas, follow-along supports can be adjusted in intensity and frequency based on client's situation and need.

Case Example

> *"Yvonne" recently enrolled at a community college program as part of her goal to obtain an associate degree in early childhood education. While both Yvonne and*

the NAVIGATE team members are excited about her starting the program, providing SEE supports are especially important for Yvonne's first day of school, considering her high level of anxiety about returning to school. For example, Yvonne made arrangements for a friend to drive her to community college and drop her off at 8 a.m. to complete her registration and get to her class, which starts at 11 a.m. During the first hour there, Yvonne learns that there is a $100 health fee that must be paid before students can be registered, with her class starting in just two hours. Yvonne has limited experience with this type of problem, and easily gets frustrated. Knowing the importance of the first day of registering for classes, the SEE specialist has made arrangements to meet with Yvonne on campus for a cup coffee at 10 a.m. to see how things are going. Instead of feeling overwhelmed and not ready for school, which could lead to an impulsive decision like leaving the campus and missing her first day of class, Yvonne knows that she has the support of her SEE specialist on her first day of school. Yvonne and her specialist do some problem solving together and develop a plan that enables her to pay her health fee without missing her first day of class.

As illustrated in Yvonne's case, it is important for the SEE specialist to be available to address obstacles or barriers that may unexpectedly crop up on the first day of a job or school, or when the client begins a new task at work. For many individuals, it is not sufficient for the SEE specialist to simply encourage the client to call if a problem comes up. By checking in regularly with the client about school or work, and being available for new job or school starts, the SEE specialist doesn't have to rely entirely on the client requesting his or her help.

Although the SEE specialist is the key person who coordinates and carries out follow-along job supports, other members of the NAVIGATE team who have contact with the client are in important positions to support the client's pursuit of educational or vocational goals. In order to accomplish this, the SEE specialist must use the integrated team approach to help develop a coordinated plan for how all team members can support the client as they begin a new venture such as starting work or school. We return to the case of Yvonne to illustrate this point below.

Case Example

Two days before starting school Yvonne saw her psychiatrist, who was aware of her educational plans. During their meeting, the psychiatrist inquired about Yvonne's anticipated return to school, and whether she was looking forward to it. The psychiatrist also took the opportunity to check with Yvonne about her plan for managing her medications while at school. Would Yvonne carry her medications with her? Would she prefer to change the timing of the dosage of medication so she wouldn't have to take medications while at school? As everyone on the NAVIGATE team knew, helping Yvonne manage her anxiety at school would be critical to her being successful there, and completing her degree. In order to ensure that Yvonne had some skills for coping with anxiety at school, her IRT clinician worked with her to learn some stress management and relaxation strategies.

Yvonne and her IRT clinician had begun this work several weeks before, so that by the time she was ready for her first day of school, she had learned a couple of strategies that she found helpful in reducing her tension and anxiety.

Follow-along supports are available to all NAVIGATE clients, regardless of their preferences or choices regarding disclosing their psychiatric disability to the school or employer. Naturally, when clients choose not to disclose their disability, follow-along supports are provided behind-the-scenes, and can occur during times such as breaks for work, in parking lots, over lunch, or while providing transportation during the first day to or from work or school. For many clients, the intensity of follow-along supports decreases gradually over time, as clients learn more and more of the self-management strategies necessary to address their concerns and perform well on the job or at school. However, many clients continue to benefit from some ongoing contact on a regular basis with their SEE specialist, even long after they have successfully landed a job or enrolled in a school program.

Logistics of Supported Employment and Education

All clients who participate in NAVIGATE are assigned an SEE specialist who works with them individually to set their educational or employment goals, and who serves as a regular member of the NAVIGATE treatment team. In keeping with the principles of supported employment, the role of the SEE specialist is to focus solely on helping the client achieve his or her vocational and/or educational goals. Thus, the SEE specialist should not carry other clinical responsibilities on the team, such as providing case management or family education. The rationale for having the SEE specialist focus only on employment and education is to avoid having that person's attention shifted to other matters which may be viewed as more pressing at any one point in time, but could ultimately jeopardize his or her ability to achieve desired vocational or educational goals.

The SEE specialist provides the full range of vocational and educational services to clients, including Education and Career Inventory, identification of client goals, job/school search, and provision of ongoing supports. This is distinguished from other programs in which some service providers do job development while others provide supports to employed clients. Having the same specialist perform all aspects of the SEE program ensures continuity between the different components of the program, and enables the SEE specialist to develop a strong working alliance and holistic familiarity with the client over time.

A typical caseload of first episode psychosis clients for an SEE specialist is 15 to 20 clients. The SEE specialist participates in weekly NAVIGATE team meetings, and serves as a regular member of the team, updating other members on clients' progress towards vocational and educational goals, any obstacles encountered, providing relevant clinical information (such as medication side effects or the worsening of symptoms). During team meetings the SEE specialist also obtains feedback from other members of the NAVIGATE team regarding the client's strengths and challenges, as well as job leads, school programs, and strategies for dealing with obstacles to helping the client meet his or her goals. Additionally, while participating in the weekly team meetings, the SEE specialist promotes the value and role of education and employment in team discussions about all clients in NAVIGATE services.

Weekly supervision between the SEE specialist and the NAVIGATE director should occur regularly. It is important for this supervision to take place, even if the SEE specialist also works in a larger supported employment program that serves a broader range of persons with severe mental illness. The SEE program is similar but not identical to supported employment programs, and therefore it is important that the unique characteristics of first episode clients be recognized and incorporated into the SEE work performed by the specialist, as well as assuring that supervision regarding the educational component of SEE is also provided. Additionally, it is important for the NAVIGATE director to assure that the SEE specialist is an integrated member of the team and works collaboratively with all other NAVIGATE services to help clients achieve success in education and employment.

Flow of Supported Employment and Education

While SEE services are person-centered, it is still important for SEE specialists to have a broad view of the general flow of SEE services, much like an experienced mountaineering guide who has a good idea of what an expedition looks like, but does not know the specifics of how each individual trip will work out. We provide a description of the general flow of engaging clients in SEE and assisting them in achieving their work or educational goals.

After a client has enrolled in NAVIGATE services, within one month the SEE specialist meets with him or her in person to provide an overview of SEE services to help determine the client's interest in the program. If the client is interested, then the SEE specialist meets with him or her to review the information contained in the SEE Orientation Sheet. The orientation of the client to SEE services should be completed within two weeks of the client expressing an interest in the SEE program.

When the SEE specialist has oriented the client to the SEE program, they begin completing the Career and Education Inventory together. This inventory helps clients and SEE specialists develop a shared, comprehensive understanding of the client's individual circumstances, strengths, talents, background, and interests. A key task in working through the Career and Education Inventory is the development of specific, personally meaningful goals for education and employment. SEE specialists should summarize pertinent information in the Career and Education Inventory for the NAVIGATE team to ensure their support of the client's goals and full integration of the NAVIGATE services. The Career and Education Inventory should be completed, and specific goals for SEE should be identified, within one month of the orientation session.

After the client has developed specific goals for education or employment, the SEE specialist and the client begin the job or school search process together. This phase has a number of activities to be completed, including benefits counseling, developing preferences for the job or school search process (including disclosure), searching for employers or educators, and clients completing applications and participating in interviews that may lead to hiring or enrollment. On average, SEE specialists and clients move from identifying specific employment and education goals to in-person interviews for school or work, within one month of completing the Career and Education Inventory.

The SEE specialist assists the client, as needed, to be successful in interviews for school or work, and then moves to providing follow-along supports when the client obtains employment or starts school. When clients are not successful with obtaining employment or locating education programs after three months of active searching, the SEE specialist works with the client and the whole NAVIGATE Team to re-evaluate the job and school search process. The SEE specialist starts providing follow-along supports as soon as clients are hired at jobs or enrolled in school. During this phase, the SEE specialist constantly assesses how the client is doing and continuously works with him or her to maximize functioning or performance at work or school, and when appropriate to set new goals such as job advancement or further education.

The following tables present illustrations of how the flow of SEE services should go in general, including some time frames. Of course, while this is a general flow of SEE services, all SEE services should be based on the client's needs, pace and goals.

SEE Flow Illustration

SEE Specialist Activities	Approximate Time Frame
Client Enrolls in NAVIGATE	Then, within one month
Meet with client to determine willingness and interest in SEE services	Then, within two weeks
Complete SEE Orientation	Then, within one month
Complete Career and Education Inventory, develop specific work or school goals	Then, within one month
Assist client in achieving specific work or school goals • Provide or arrange for Benefits counseling • Develop plan for approaching employers and educators (includes disclosure decision) • School or job search • School or job development • Client applications and interviews	Then, within three months or
If client starts work or school • Provide follow-along supports • Evaluate client satisfaction • Develop new goals as needed	If client does not start work or school • Revisit school or job search plans • Schedule NAVIGATE Team review Work with client to make changes in plan to improve effectiveness

This diagram demonstrates what the flow of SEE services may look like for a client named “Sam” who is working with an SEE specialist named “Heather.”

SEE Flow Illustration Example

SEE Specialist Activities	Approximate Time Frame
Sam enrolled in NAVIGATE Services on August 19. The NAVIGATE director informed team members including Heather.	Then, within one month
Heather met with Sam on September 9, in Heather’s office. Sam indicated he was interested in working on his education.	Then, within two weeks
Heather and Sam met two times, on September 14 and 17. They reviewed the material in the SEE Orientation handout and discussed how they would work together.	Then, within one month
Heather and Sam met three different times (twice at his apartment) to complete the Career and Education Inventory on September 21, 24 and 28. Sam set a goal to take classes related to working as a home health aide.	Then, within one month
Heather and Sam discussed benefits counseling on October 1 with Sam’s parents and the NAVIGATE family specialist (with Sam’s consent). Sam decided to apply for Social Security Disability and Medicaid while applying for classes. Heather and Sam also discussed how they would search for schools, Sam gave permission to Heather to share information about him and be present during meetings with admissions officers and other personnel at prospective colleges. Sam agreed to look online for information about local schools. On October 8, Sam and Heather visited two local community colleges with home health aide courses. On October 15, Sam and Heather met at the college he liked best and together visited the library and met with people at the Student Disability Services office. Sam visited a class on his own. On October 21, Sam applied to take a course starting in January and was accepted.	Then, within three months

On November 12, Heather and Sam met at the school library; they planned where to get materials and books, and started working on his study schedule and plans. Sam's first day of class was on January 5. They set up two more meetings in December and one on January 4. Further follow-up support was provided based on Sam's needs throughout the semester.	

SEE Contact Sheet and Fidelity Scale

The SEE specialist should document each meeting with the client, family member, and potential or actual employer or school personnel using the SEE Contact Sheet (see Appendix). The purpose of the contact sheet is to help SEE specialists and supervisors keep track of the client's progress in treatment, the kinds of interventions and supports that are provided, and whether or not the client is completing mutually agreed upon tasks in between sessions.

Fidelity ratings will be based on upon the key ingredients of SEE, including zero exclusion, providing community based services, rapid job and school search, provision of follow along supports, and honoring the client's goals and preferences. The SEE Fidelity Scale (see Appendix) is designed to measure the extent to which SEE specialists are implementing treatment as intended by the model and to provide SEE specialists with ongoing feedback about implementation of SEE with their clients. The SEE Consultant or the SEE supervisor complete the fidelity scales based on observing SEE sessions, reviewing contact sheets. Feedback from the fidelity scale can be used during supervision to help SEE specialists stay faithful to the model and to assess strengths and weaknesses that can be addressed during supervision, leading to better client outcomes.

Summary

SEE services in the NAVIGATE program are most effective when they are available to all clients, and when all clients are encouraged and supported in participating in the services. Effective SEE specialists work in a hopeful, recovery-based manner that honors and respects each individual client's school and work preferences. SEE services are designed to empower individuals with accurate information, to help them develop a sense of their own strengths and resiliency, including their talents and coping skills that will serve them well at work and school. Providing most SEE services in the community, and continuing to provide ongoing supports after successful attainment of work or enrollment in school, gives clients the practical assistance they need to pursue and achieve their educational and employment goals. Finally, the integration of SEE services with all aspects of the client's clinical treatment in the NAVIGATE program maximizes the chances of success by ensuring that the team supports the client's vocational or educational goals, and that clinical services are sensitive and responsive to the client's goals, needs and preferences.

Chapter 3
Engagement, Orientation, and Assessment

All participants in the NAVIGATE program are assigned a Supported Employment and Education (SEE) specialist. Individuals differ widely in their experience of psychosis, involvement in school or work, strengths, interests, and plans for the future. This chapter will provide suggestions for engaging clients, orienting them to the SEE program, and providing a brief assessment.

Initial Engagement

When meeting NAVIGATE clients for the first time, it is helpful to keep in mind that they are usually dealing with multiple concerns simultaneously, such as processing their experience of psychosis, dealing with interruptions in school, work, and friendships, responding to financial problems, and worrying about their future. Many clients are also new to the mental health system and are unfamiliar with the range of services provided by the program, including those of the SEE specialist. To engage clients successfully, it is important to convey interest and empathy about their experiences, promote hope in achieving their goals, and to proceed at a pace that is comfortable to each individual. Even before a formal orientation to SEE, it is often helpful to briefly describe the role of SEE specialists and how they are part of the NAVIGATE team, which includes the prescriber, the Individual Resiliency (IRT) clinician, and the Family Education (FE) clinician. It is paramount to let clients know that in SEE they have choices about what priorities to set, and what goals they wish to seek. SEE specialists reinforce this by using motivational strategies, active listening skills, and staying focused on the person's needs, wants and desires related to their education and careers.

Talking with the client about his or her recent experience with work and/or school is a good foundation for engagement in SEE. When the client experienced his or her first psychotic episode, he or she may have been in, or about to start, school or working. Some clients may have been performing very well at school or on the job, whereas others may have been experiencing difficulties. Some clients may have a desire to pursue advanced education, whereas others want to finish high school or achieve a high school equivalency diploma (GED). Some may want to develop a longer-term career path involving school and career advancement, whereas others may be interested in obtaining training in a trade. Many clients are unsure of what they want and how they can proceed with their lives while coping with a new and disruptive illness. Engaging clients in SEE is the specialists' challenge, which requires the development of a rapport with clients, meeting clients "where they are at," listening to their experiences regarding psychosis and its impact on their lives, re-establishing goals, and providing help, encouragement, and hope. As SEE specialists get to know clients and engage them, it is especially important to keep in mind that since the onset of a psychotic illness, clients may be feeling less confident about pursuing work and school goals. Some clients may have been given inaccurate information, such as that work is too stressful and “you should just consider yourself as disabled from now on.” Other people may have been told that they will not be able to continue with their education. Some clients may have developed the belief that they will not be able to succeed in work or school given their experience with psychosis. A key role for the SEE specialist is to provide more accurate information about their prospects for going to school and working, and to foster and develop a strong sense of hope within the person. A good place to start is to listen carefully to clients and to provide an empathic response to their challenges, while at the same time paying attention to personal strengths, talents and indicators of personal resilience, and taking the time to explore and note these.

Orientation

Clients in NAVIGATE will be working with a team of professionals, and it is important that both the client and the SEE specialist are clear about the role of SEE in helping participants (re)establish and achieve their school and work plans. While the client may be experiencing a variety of challenges and concerns in different areas, it is important for the SEE specialist to focus on the client’s goals related to their education and employment. Other areas of the person’s life and functioning are important to the clients success in SEE, but it is critical to remember that NAVIGATE is a comprehensive team-based intervention, and that other team members are working with the client, including the Individual Resiliency Training (IRT) clinician, Family Education (FE) clinician, and the prescriber. In fact, when new clients join NAVIGATE, some teams arrange to have a joint meeting with them and their relatives (or other supporters), so they can meet all the team members and receive an orientation to the whole program, with later sessions focusing on orienting clients and relatives to separate components (e.g., SEE, IRT, and FE).

When meeting with the client to orient them specifically to SEE, the SEE specialist uses the SEE Orientation Handout (see Appendix) to provide key information. The handout is divided into four parts:

- What are the goals of SEE?
- How does SEE work?
- What can you expect from your SEE specialist?
- What will your SEE specialist expect from you?

During the orientation session it is important for the SEE specialist to use a welcoming tone and engaging style without overwhelming the client. The SEE specialist and the client should review the information contained in the SEE orientation handout, pausing frequently to check for understanding and to answer any questions. Clients will differ regarding how much information they can take in at a given time and the SEE specialist should gauge this issue. If the client seems to “shut down” following the presentation of a few bits of information, then the SEE specialist should adjust their expectations as to what will be accomplished during this session. Once engaged, the client’s tolerance for incoming information may improve. Additionally, symptoms, such as depression, often result in slowed information processing, causing a “slowing down” of encoding new information. Thus, although the client may appear as if he or she did not “take in” information presented by the SEE specialist, it is because the information takes longer to “consolidate” to the point that the client can access it in their mind. The SEE specialist may find that after a rest break, or at the next session, the client heard and understood more than was initially apparent. Thus, it is also useful to begin to gather observations about the client. For example, how is the person processing information? Does he or she seem to be understanding? Does the person appear to feel comfortable asking questions? Does the person appear to have challenges with reading or understanding spoken information? Is there a language barrier or challenge? Does the person appear to have difficulty with concentration?

Keep in mind that the primary goal of an orientation meeting is to begin to develop a hopeful, person-centered and collaborative approach for your future work together.

Involvement of Family Members and Other Supporters

It is important to consider the person’s family (and other supporters) in the SEE process. For some people entering SEE, their family may be a significant source of financial support, housing, food, and health insurance. Families are often very interested in the SEE component of NAVIGATE and appreciate being involved (with the client’s permission) at various points in the program. It is especially important to consider involving the family when talking about benefits, as these decisions often affect the family as well as the client. For clients who are ambivalent about inviting their family into the SEE process, it is helpful to explore their experience with family members and to evaluate the pros and cons of including family members in SEE, particularly when discussing benefits (see Chapter 5). The SEE specialist will honor and respect the client’s decisions about family involvement and may ask if they can revisit this decision in the future if the client does not want to involve family members at first.

Many NAVIGATE clients may be unsure about how their family members (or other supporters) could help them achieve their educational or work goals, so it is useful for the SEE specialist to develop some specific examples and ideas. For example, family members can help the client identify his or her strengths and talents, prompt the client to remember courses he or she did well in school or jobs he or she enjoyed, and contribute to developing leads in the school search or job search.   Family members can also offer concrete assistance to the client in taking steps towards school or employment, such as helping the client get up in time for a job interview, providing transportation, helping the client to organize their home environment, and doing role plays to practice school or job interviews. Family members and other supporters may be helpful at any phase of the SEE process.

Using the SEE Orientation Handout: "How does SEE work?"

As a person starts with NAVIGATE and SEE services, it is useful to keep reminding them that how the program helps the person is based upon the person's own goals, and preferences about how to achieve those goals. Some people starting SEE may have a sense that they have lost some of or all of their ability to achieve their personal goals. It is helpful to develop a mutually agreed upon process for both the SEE specialist and the client to keep checking that both goals and the steps towards achieving those goals are based on what the person wants to achieve. Simply put, people in SEE are most likely to be motivated to achieve goals that they themselves have established.

Some employment and education services for people with psychiatric challenges are designed only to help the person get into school or get a job. SEE is designed to also help people be successful once they are in school or on the job. SEE works much like an employee assistance program (EAP) at work or a student assistance program at school. It is important to help clients understand that an SEE specialist works with people in all phases of this process based on the person's needs, challenges and goals.

Unlike other NAVIGATE services, the SEE specialist has time to meet with the person in a variety of settings, including at the person's residence, at a local library or coffee shop, at a school, or at an employer's business. It is helpful for the client to know that what you help them with, and where you help them, as well as who is involved, is totally up to them. Some clients may not want a teacher or an employer to know that they are in NAVIGATE, so they may not want the SEE specialist to meet with them, while other clients may need or want assistance in working with a potential employer or teacher. By being available to the client in their community, the SEE specialist is also able to develop a better understanding of what is happening in different environments in the person's community in order to be as effective as possible. The SEE specialist knows to check in with decisions clients have made regarding the visibility of the SEE specialist in various community environments because clients may change their mind. For example, some clients may initially prefer not to let their employer know they are participating in the SEE program, but then later decide they would like their SEE specialist to advocate for them with the employer.

Using the SEE Orientation Handout: "What can you expect from your SEE specialist?"

One of the key features of all NAVIGATE services is that they are designed to help clients understand information and develop skills and strategies to complement their strengths and resiliencies so that they may be successful in accomplishing things for themselves with services and supports. Another key point to communicate early on is that the SEE specialist has expectations of what clients can and will do for themselves. Therefore discussing the idea of working together from the beginning is crucial.

The SEE specialist should let the client know that his or her job is to let the client "take the lead" as much as possible. At the same time, the SEE specialist is available to step in with assistance, consultation and ideas when needed or requested by the person.

Using the SEE Orientation Handout: "What will your SEE specialist expect from you?"

As stated above, and worthy of repeating, SEE work is done *with* the person, not *to* the person or *for* the person. From the beginning, SEE specialists should convey that they will be supportive and helpful, while at the same time, they will be working to develop mutually agreed upon tasks for the client to accomplish between meetings.

By developing mutually agreed upon tasks for the client, the SEE specialist helps the client increase self-confidence and self-efficacy. Many people who join the NAVIGATE program and begin receiving SEE services are at a point in their life where establishing more independence and self-autonomy are important developmental tasks. It is helpful for the SEE specialist to strike a balance between offering information and assistance, and encouraging the person to do things on his or her own. The SEE specialist should remind clients that they care about what is important to them, and ask clients to be open and honest with them about their work together. The SEE specialist should encourage clients to ask questions when they are unsure of something, and let them know they will periodically check in on them to ensure their understanding.

Using the SEE Education and Career Inventory

People with a psychiatric disorder are unfortunately sometimes required to take numerous tests, evaluations, situational work assessments, unpaid positions, or volunteer jobs as a condition to receiving services to help them achieve their education and employment goals. In SEE, this is not the case. The job of the SEE specialist is not to "assess" or "evaluate" if the person is ready for school ready or work ready. Rather, the job of the SEE specialist is to help the person determine which path is best for him or her and to help the person make progress along that path, starting as soon as possible, by providing information, encouragement, and agreed upon supports.

The SEE Education and Career Inventory (see Appendix) is designed to gather information to help the person make some decisions about what goals they would like to pursue, and what types of supports or services may be needed for them to be successful. In SEE it is important not to constrain goals but rather to develop and understand them. Some clients may be very unsure and perhaps ambivalent about what interests them in terms of education or employment. For these clients, the SEE specialist may help them set up a plan to explore and gather more information to help them establish goals. There are several effective strategies to help people accomplish this and using multiple strategies is often the best approach. For example, an SEE client may be interested in attending a community college, but may lack information about it. In this case, the SEE specialist and the client may develop some shared tasks to learn together about community colleges. They may decide that the client will do an internet search to gather information about community colleges in the area. At the same time, they may also decide that the person is going to check with family members who have attended community colleges to see what their experience was like.

In the example above, when the client brings back information on local community colleges to his or her next SEE meeting, he or she may decide to visit one of these community colleges in a casual fashion with the SEE specialist. At the community college they may visit the student cafeteria, the library and the student resource center. It is often useful to have the SEE specialist accompany a person who is very anxious or who has concentration difficulties, especially when they need to process information in new environments.

Some people who join NAVIGATE are already employed and want help with maintaining their current job, and/or considering going back to school. For them, the Education and Career Inventory process should begin by gathering information about what is going on currently at work. For example, the SEE specialist can ask questions such as: *How is the job going for you? Are you currently receiving any supports for your job? What kind of things do you do well at work? What kind of evaluations or feedback have you received at work? What is your supervisor's style of providing feedback to you? Are you comfortable with it? What do you like most about you job? What do you dislike about your job? What are the things that are most challenging for you at work?*

On the other hand, some people who join the NAVIGATE program have not been working or attending school recently. Some may have left a job or dropped out of high school. For these individuals, the Education and Career Inventory may start with looking at what was their most recent experience in work or school, including what they enjoyed and what they found challenging. Some people who are experiencing psychosis or other symptoms may also notice that they are having difficulties with their thinking skills. Here are some examples of common signs that someone is having thinking difficulties:

- Problems paying attention long enough to read a book chapter.
- Difficulty remembering something important that someone said to you.
- Trouble following directions to a classroom.
- Not responding fast enough to something the boss has asked you to do on the job.
- Difficulty solving problems, such as what to do when a coworker takes a longer break than they are supposed to and you are left doing your coworker's job as well as your own.

Difficulties with thinking skills can be anxiety-provoking, embarrassing, and costly in terms of limiting progress in school or work. Problems with thinking skills, for some people, are much bigger obstacles to achieving work and school goals than other symptoms that commonly occur with mental health difficulties, such as depression or hearing voices. Even worse, thinking skills impairments are often overlooked by mental health professionals, who often focus on other symptoms of mental illness, and as a result fail to provide help, support, and solutions for these problems.

However, there are many strategies that SEE specialists can use to teach clients how to cope with and overcome their thinking difficulties and to achieve their educational or employment goals. Chapter 4 of this manual, Addressing Illness Related Challenges to Work and School Functioning provides information and checklists to help NAVIGATE participants recognize if they are having difficulties with their thinking skills, and how these difficulties affect their ability to be the best students and workers possible. Chapter 4 also provides strategies to help NAVIGATE participants function optimally in school and the workplace, despite illness-related limitations in thinking skills. In addition, there is a helpful handout for clients in the Appendix, “Coping with Cognitive Difficulties at Work or School.”

Effective SEE specialists recognize that the information gathered in the Education and Career Inventory has multiple important uses. For example, if you are working with NAVIGATE clients who are unsure about areas that interest them, you will find ideas on the SEE Education and Career Inventory about previous jobs and educational experiences, and also about other things clients do in their free time, such as hobbies or sports activities, which will be addressed in the IRT program as well. Or, if an SEE specialist is helping a person obtain employment through job development, employment applications or developing skills and strategies for job interviews, the SEE specialist and the client may review the information in the SEE Education and Career Inventory and identify some specifics strengths that match well with what an employer is looking for.

As part of the process of gathering and compiling information, it is important for the SEE specialist to develop a mutually shared understanding of how SEE will be useful to the person in achieving his or her desired goals. It is also important to strike a balance between the need to gather and review information and the need to move at a pace that is comfortable for the client. Some SEE clients do not need to focus much time and information on the Education and Career Inventory as they are already working or going to school and have clear goals and ideas about the next steps they want to take, and the supports they would like to receive.

As with all good mental health services, assessment should be an open and ongoing process for gathering and modifying client information as needed. During the course of SEE services, new or different information, preferences, goals or interests will emerge. The SEE Education and Career Inventory should be updated whenever this occurs as it could impact the mutually agreed upon plan that the client and SEE specialist have. The SEE specialist should also remember that changes in information should also be shared with other NAVIGATE team members in weekly meetings.

The information in the Education and Career Inventory should also be updated and reviewed after the person has started school or work. Having updated information is a crucial part of developing a follow-along support plan for the person to help him or her be successful at school or work. For example, after a person has started school and he or she reviews with the SEE specialist how things are going, he or she may remember significant challenges and distress in school, which may have coincided with midterms and final exams. Therefore, the SEE specialist and the client should review what happened in the past and begin to develop strategies and plans to address this together, with the goal of planning for supports that will serve to avoid similar difficulties, while paying careful attention to how other NAVIGATE team members or family members/supporters may be helpful in similar situations in the future.

Ongoing Engagement with Clients

Although many clients regularly attend SEE meetings, some may start meeting with an SEE specialist and then stop without notice, and some clients may simply not show up for meetings at all. It is important for the SEE specialist to try to understand what is happening with the person when their participation falls off or becomes erratic. For some clients, the psychotic episode may produce feelings of suspicion that make it challenging to trust and work with new people. Other clients may be angry, shameful, or depressed by what has happened recently with their mental health. Some clients may have previously had very stressful or even traumatic school or work experiences, and attempting to return to work or school may be frightening. For clients who were actively involved in the SEE program, an increase or relapse of symptoms can lead to erratic participation or avoiding the SEE specialist.

When clients miss scheduled meetings, or when an SEE specialist is having difficulty establishing a relationship and engaging the person in SEE services, the specialist should attempt to discuss this directly and gently with the person. The SEE specialist will also consult with the other NAVIGATE team members, either informally or formally at a team meeting or both. For example, the IRT clinician may have some ideas about what is going on, or may have started discussions on the subject of “processing the psychotic episode” in IRT Module #5, which may be relevant to the client’s current difficulties in engaging with SEE. Likewise the Family Education clinician may have started working with the family and client together and may have some thoughts about how best to proceed. Or, one team member may have already developed a rapport with the client and the SEE specialist may want to set up a joint meeting to help strengthen his or her working relationship with the client. It is helpful for the SEE specialist to share information about challenges in engaging clients in the NAVIGATE team meeting and to develop a team-based approach to engaging and retaining clients in all components of the program, including SEE.

Summary

The orientation and assessment phase of SEE is focused on gathering important information to develop a shared understanding of clients as individuals, their employment or school history, and their preferences with respect to school, work, and career, as opposed to focusing on a formal evaluation of clients’ skills or aptitude. The time devoted to assessment is generally relatively limited, and frequently takes place over the first month following the client's enrollment in SEE. It is helpful to involve families and other supports with the permission of the client. Engagement and assessment are ongoing processes throughout all of SEE, so that additional information about the clients' work or school preferences, interests and skills can be gathered and integrated throughout their participation in the SEE program.

Chapter 4
Addressing Illness-Related Challenges to Work and School Functioning

Many people with the first episode of psychosis demonstrate a significant improvement in their symptoms after receiving antipsychotic medications. Similarly, clients recovering from a first episode of psychosis may have little or no cognitive difficulties. Although these clients may require little or no attention to address symptoms or cognitive difficulties, for many others some persistence of symptoms is common, as well as some degree of cognitive impairments, either of which can interfere with pursuit of work or school goals. In addition to symptoms and cognitive difficulties, relapses and substance abuse are other illness-related problems that can interfere with the ability of clients to achieve their work or school goals. Symptom relapses can be extremely disruptive, often requiring hospitalization, interrupting the individual's involvement in or seeking of work or school programs. Substance abuse is another common problem in people with the first episode of psychosis that can have a negative impact on school or work performance. Furthermore, substance abuse is a frequent precipitant of relapses and thus can interfere with work or school in that way.

An awareness of how illness related impairments can interfere with educational and vocational goals, and strategies for reducing the effects of these impairments on these goals, are important tools for maximizing the effectiveness of supported employment and education (SEE) services. This chapter focuses on helping SEE specialists recognize when cognitive impairments or persistent symptoms are interfering with their client's pursuit of his or her work or school goals. This chapter also provides recommendations for effective coping strategies for minimizing the untoward effects of symptoms on work or school.

The problem with relapses is addressed in the NAVIGATE program in both the Family Education (FE) program and the Individual Resiliency Training (IRT) program. In both of these programs, clients (and their families) are taught how to develop a relapse prevention plan based on identifying potentially triggering situations and early warning signs of relapse, and formulating a plan for responding to signs of an impending relapse such as by arranging for special appointment with the prescriber for temporary increase in medication dosage. Substance abuse is addressed primarily in the IRT program. If the SEE specialist identifies either relapses or substance abuse as interfering with a client's ability to pursue work or school goals, then he or she should bring this to the attention of the NAVIGATE team to see that it is addressed rapidly and effectively.

In this chapter, we focus on recognizing the effects of cognitive difficulties or symptoms on interfering with functioning at work or school, and identifying strategies for minimizing their negative effects.

Effects of Symptoms and Cognitive Impairments on Work or School

Both symptoms and cognitive impairments can have an important impact on all phases of pursuing work or school goals, including the receipt of SEE services in the first place, successfully obtaining a job or enrolling in a school program, and work or school performance. With some clients, the impact of symptoms or cognitive impairments is readily apparent.

Case example

"Josephine" was struggling with depression that was so severe she often had difficulty getting out of bed in the morning, and frequently missed her appointments with her SEE specialist.

Case example

"Ted" openly talked about how hearing voices often distracted him, and made it difficult for him to focus on school work.

Case example

"Sydney" did not have significance symptoms, but had a very short attention span, which made it difficult for him to focus on his professor for an entire hour-long lecture.

Case example

"Vanessa's" information processing speed, or thinking speed, was significantly slower after experiencing a psychotic episode. This made it difficult for her to answer all the questions on timed tests at school, and slowed her performance on her waitressing job to the point of being fired.

However, the effects of symptoms and cognitive difficulties in pursuing work and school goals can sometimes masquerade as other problems. Without understanding how symptoms and cognitive problems may present themselves in people pursuing work or school, the SEE specialist may reach erroneous conclusions about the problem at hand, precluding the development of effective strategies for addressing the underlying symptom or cognitive problems.

Case example

"Edwin" frequently missed his appointments with his SEE specialist. Although Edwin said he wanted to work, his SEE specialist was dubious because he thought that Edwin's missed appointments reflected a lack of motivation to work. However, a closer inspection of Edwin's pattern of missing appointments with his SEE specialist

indicated that he had very poor organizational skills and that he often missed appointments either because he forgot about or slept through them.

Case example

"Jackie" seemed to tire very easily in her meetings with her SEE specialist, and often lacked enthusiasm, despite expressing an interest in getting a job in a beauty salon. Jackie had one job interview at a beauty salon, but she did not appear very enthusiastic about the job to the interviewer, and did not get the job. Jackie's SEE specialist thought that she was not very motivated for work. However, a closer inspection of the problem, and the discussion of it with the other members of the NAVIGATE team, indicated that Jackie had severe negative symptoms which limited her energy and stamina, which was also reflected in her blunted affect, including diminished facial expressiveness and voice tone (i.e., flattened affect). Further discussion with Jackie revealed that even when she was very interested in something, she failed to convey her enthusiasm to others in her voice tone and facial expressions.

All the case examples above illustrate the importance of correctly identifying the underlying symptoms or cognitive problems as early as possible. In the next section we address cognitive impairments, including the different areas of cognitive functioning that are often impaired in people with a recent episode of psychosis, how to recognize possible cognitive difficulties, and effective strategies for reducing the negative effects of cognitive impairment on the client's ability to pursue work and school.

While symptoms and cognitive impairments can adversely impact on work or school functioning, it is important to note that the presence of these challenges does not invariably interfere with work or school. In fact, many people with cognitive impairments and persistent symptoms are able to successfully pursue and achieve their work or school goals, despite these difficulties. The most successful clients with persistent symptoms and/or cognitive difficulties are those who develop effective coping skills for reducing the interference caused by their symptoms or cognitive limitations.

Handout on Coping with Cognitive Difficulties

An educational handout on cognitive difficulties is included in the Appendix of the SEE Manual, entitled "Coping with Cognitive Difficulties at Work or School." This handout describes the importance of specific areas of cognitive functioning, how to recognize the effects of cognitive problems at work or school, and strategies for addressing those problems, all written in easy-to-read language designed for clients. The SEE specialist can use this handout in several ways to facilitate addressing cognitive difficulties that interfere of work or school. First, the specialist and client can review the handout together, complete the worksheets, and select and practice coping skills for dealing with specific cognitive problems. For example, the SEE specialist and client can take turns reading brief sections from the handout, and discussing each section before going on. Or the SEE specialist can summarize particular parts of the handout, with the client completing the worksheets with the SEE specialist's help.

Second, the SEE specialist can use the information in the educational handout to teach the client about cognitive difficulties, to pinpoint cognitive problems contributing to lack of progress towards work or school goals, and to select and teach coping strategies for addressing those problems without the client actually reading or completing parts of the handout. Used in this way, the handout serves as a guide to the specialist in leading discussions and teaching coping strategies for cognitive difficulties to the client, similar to a manual. This may be especially appropriate for clients who have limited reading skills, and/or for those clients who feel self-conscious or anxious about using reading materials when meeting with the SEE specialist.

Third, family members (or other significant persons, including teachers, tutors, etc.) can benefit from understanding more about their relative's illness, including cognitive difficulties. In the spirit of helping the client achieve his or her vocational or educational goals, and with the client's permission, the SEE specialist may meet with family members and use the handout to guide a discussion about the nature of cognitive difficulties, how they may interfere with the client's progress towards his or her work or school goals, and strategies for reducing adverse effects. Families can play an important role in helping clients cope with cognitive difficulties. Thus, educating families about those difficulties, and involving them in developing and implementing effective coping strategies can be an effective way of reducing the interference caused by cognitive problems.

Cognitive Impairment

Cognitive functioning is frequently conceptualized as having four separate domains, each of which may be impaired and interfere with work or school: 1) attention-concentration, 2) thinking speed, 3) memory, and 4) planning, organization, and solving problems. *Attention* is the ability to focus on something specific without being easily distracted. *Concentration* is the ability to sustain focus on something for a particular period of time. People who have experienced an episode of psychosis often have a reduced attention span, which can interfere with performing well at school or work.

Thinking speed, or information processing speed, is the time it takes for an individual to either react to an environmental demand (such as responding to another person's statement) or to complete a task. People recovering from a first episode of psychosis may have a significantly slower rate of thinking speed than other people, which can be frustrating to the individual and others, and make the person less able to meet task demands that requiring relatively fast performance (e.g., participating in a conversation, taking notes in class, responding to a customer's request).

Memory is the ability to retain information both for brief periods of time (such as a telephone number) and longer periods of time (such as someone's name). People recovering from a first episode of psychosis often have memory difficulties that interfere with the retention information in school and on the job.

Planning, organization, and solving problems is a complex set of skills (also called *executive functioning*) that is often impaired in clients with a recent episode of psychosis. Clients may fail to plan ahead for school or work, resulting in skipping important preparatory steps. Poor organizational skills can lead to frequent absences, tardiness, and/or inefficiency at work or school, and inability to complete tasks in a timely fashion. Difficulties solving problems may lead to impulsive and ineffective responses to unexpected challenges, which can jeopardize both performance and retention in a job or school program.

Clients may have difficulties in one or more areas of cognitive functioning. In addition, because different areas of cognitive functioning may influence each other, addressing a problem in one area can sometimes address problems in other areas. For example, addressing attention difficulties can improve memory. For these reasons, it is helpful to conduct an assessment in order to pinpoint which areas of cognitive functioning are interfering most with the pursuit of work or school goals. The handout previously described provides between five and 10 behavioral indicators of difficulties in each of the four cognitive domains. Examples of sample questions for each domain of cognitive functioning are provided below.

<u>Attention-concentration</u>

- “Needing teachers or supervisors to repeat what they have said.”
- “Spacing out or losing concentration in the middle of reading, studying, or completing a work task.”

<u>Thinking speed</u>

- “Feeling left out of conversations because people don’t wait for you to participate.”
- “Difficulty completing tests on time.”

<u>Memory</u>

- “Forgetting class or work schedules.”
- “Forgetting names of supervisors, co-workers, teachers, or classmates.”

<u>Planning, organization, and solving problems</u>

- “Problems resolving conflicts with coworkers are classmates.”
- “Requiring frequent assistance to handle new job or school responsibilities.”

The assessment questions contained in the handout are presented in a self-report format for clients. Because many clients have an acute awareness of their cognitive difficulties and resulting impact on functioning, the self-report format is a very useful tool. However, these assessment questions can also be completed by the SEE specialist, based on his or her observations of the client during their meetings, at school or job interviews, or performing on the job or in school. Similarly, family members may have a great deal of useful information about the client's cognitive challenges, and obtaining their perspective as to which areas of cognitive functioning are causing the greatest interference can prove valuable.

Early evaluation of cognitive impairment can serve two purposes. First, prior to enrolling in the SEE program, the client may have experienced significant problems at work or school. During the initial assessment period of SEE, when reviewing the clients' work and education history, these problems could become evident. By conducting a finer grained analysis aimed at identifying cognitive difficulties that may have contributed to past difficulties at school or work, the SEE specialist may garner important information that can be used in planning supports for the job or school search. In the case of prior work or school difficulties, careful evaluation of cognitive contributions to these difficulties, advance support planning can serve to avoid work or school difficulties, rather than waiting for problems to occur. An advantage of this approach is that it can stop a cycle of unsuccessful work or school experiences which over time can lead to demoralization and abandonment of plans to get a job or enroll in school.

Second, assessment of cognitive difficulties can be initiated when the client experiences difficulty making progress towards his or her work or school goals. For example, problems regularly participating in meetings with the SEE specialist, inability to successfully land a job or enroll in a school program despite opportunities to do so, or poor performance at work or school, indicate a need to for assessment of the possible role of cognitive difficulties in contributing to these problems.

Developing Effective Coping Strategies for Cognitive Difficulties

Following identification of the specific cognitive contributions to problems at school or work, the focus of the meetings between the client and SEE specialist can shift to the development of effective coping strategies. For each area of cognitive difficulty, the handout describes a variety of different strategies for coping with and reducing its interference on work and school. The SEE specialist reviews the different coping strategies with the client for a particular area of cognitive difficulty, evaluates which strategies the client currently uses, and which additional ones he or she would like to learn. The SEE specialist then helps the client learn and practice new and more effective coping strategies for dealing with the cognitive difficulties.

The general goal of the SEE specialist is to help the client learn and consistently use a variety of different coping strategies for dealing with specific cognitive difficulties. The more coping strategies that an individual is able to use to minimize the effects of cognitive difficulties, the more successful he or she will be in achieving vocational or educational goals. The process of teaching more effective coping skills for specific areas of cognitive functioning can be summarized in a series of steps described below.

- **Review the list of different coping strategies with the client, briefly describing each one, and evaluating whether the client has used or is currently using that coping strategy.** If the client has used a coping strategy, the specialist inquires as to whether it has been effective at reducing the cognitive difficulty. If the client indicates that the strategy has been effective, the SEE specialist may ask for a demonstration of the use of the strategy by the client to ensure that the client is accurately describing the strategy, and to give the specialist a better understanding of its use. The specialist explores how often the client uses that strategy, and whether it has the potential to be more helpful if it is used more often. If so, the SEE specialist develops a plan with the client to use that coping strategy more often. The rationale for increasing the use of coping strategies that are already in the client's repertoire is that these strategies do not need to be taught and they already have some track record of efficacy. It is relatively common for clients to have some effective strategies for coping with cognitive difficulties that are underutilized.

Case example

"Ron" had a great deal of difficulty focusing on writing assignments. Evaluation of the different signs of cognitive difficulty with the SEE specialist indicated that he had the most problems in the areas of attention and concentration. When reviewing the different coping strategies for this area, Ron indicated that sometimes when he is writing on the computer he turns off his e-mail to minimize distractions, which he said is helpful. However, he reported only sporadic use of the strategy. Ron's SEE specialist commented that this strategy could be even more helpful if it were used more often, to which Ron agreed. They worked out a plan together for Ron to make it a habit to turn off his e-mail when he was writing a paper.

- **Identify a new coping strategy to address the area of cognitive difficulty.** The client may choose the strategy or the SEE specialist may suggest one, or some other process may lead to a mutually agreed upon new coping strategy.

- **Model (demonstrate) the coping strategy to the client.** Most of the different coping strategies can be demonstrated by the SEE specialist, which often provides an effective way of familiarizing the client with the strategy. The demonstration of the skill can be in the form of a role play of a situation where the strategy would likely be used, but it could be a demonstration of how to use the strategy in an actual situation; the choice depends on the coping strategy and where it is being taught. In the first example below, a coping strategy is demonstrated by the SEE specialist in a real situation. In the second example, a role play is used to demonstrate the coping strategy.

Case example

"Gladys" had trouble keeping up with a number of calls she needed to make for her sales job. A close inspection of her performance problems, combined with reviewing the signs of each area of cognitive difficulty in the handout, indicated that her pace of work was satisfactory (i.e., how long it took her to make each call), but that she often "spaced out" or shifted her attention to other things between phone calls, resulting in the loss of valuable work time. After reviewing the different coping strategies in the handout, Gladys decided she wanted to try the strategy of removing distracters from her work environment. Gladys indicated that her desk at work was pretty messy, and contained lots of interesting things to divert her attention, such as family photos and magazines. To demonstrate the difference between working at a clean vs. a messy desk, Gladys' SEE specialist first piled up a bunch of clutter around his desk and then took out a pad of paper and began "workin". He then stopped, and cleaned up all the clutter so that there was nothing on his desk except for the pad of paper. He sat down again and began to "work". After a minute or two he stopped, turned to Gladys, and asked what she noticed was different in the two demonstrations. He asked whether she thought that the clutter and the first demonstration might interfere with his working, and why. He then asked whether her desk resembled the cluttered desk or the clean desk, to which she replied the cluttered desk.

Case example

"Lewis" felt shy and embarrassed at school because he always had trouble remembering people's names. After reviewing the different strategies for improving memory, Lewis expressed an interest in trying the strategy in which the person repeats back the name of a new person as soon as it is learned. Lewis's SEE specialist told him he would demonstrate the strategy in a role play. The SEE specialist set up the role play in which Lewis was in a class, and the student next to him introduced himself to Lewis as "John." The specialist told Lewis that he (the specialist) would play the part of Lewis, and that Lewis would play the part of his new acquaintance, John. They decided that Lewis, playing the part of John, would start the conversation, and that the specialist, playing the part of Lewis, would demonstrate the strategy.

JOHN: Hi there. My name is John. Did you get the homework assignment for last night?

SPECIALIST: Hi John. It's good to meet you. I did get the homework assignment; let me get it out for you.

- **Engage the client in practicing the coping strategy.** The practice of the coping strategy can be in a role play of a simulated situation, such as the example of Lewis and his SEE specialist described above, or in a real life situation. For example, the client and his or her SEE specialist could go to the client's study or work space and make modifications in that environment in order to reduce distractions. Sometimes practicing the skill actually involves beginning to use it. For example, a client with poor organizational skills who often misses appointments could be provided with an appointment book with the initial "practice" involving writing appointments down in the book.

- **Develop a plan with the client to practice or use a strategy on his or her own.** It is best that the client can practice the skill enough times in the meeting with the SEE specialist so that he or she feels comfortable trying it on his or her own. The more specific the assignment is in terms of when and where the strategy will be used, the more likely it is that the client will succeed in following through on it.

Case example

"Eddie" had a great deal of difficulty getting to his classes on time, and for that reason he was doing poorly at his local community college. A review of the different areas of cognitive difficulty indicated that his primary problem lie in the area of poor organizational skills. After reviewing the different strategies for improving planning, organization, and problem solving skills, Eddie chose developing a routine as a strategy he wanted to try. Eddie did not own alarm clock, and it took him about 45 minutes to get going in the morning, including choosing his clothes, showering, and getting his books together. After talking about it together for awhile, Eddie and his SEE specialist decided upon the following plan for Eddie's new routine: buying alarm clock and setting it each night before class.

- *Planning what clothes he was going to wear the next day the night before.*
- *Organizing school materials the night before.*
- *Taking a shower the night before.*
- *Preparing the coffee machine the night before so all he needed to do in the morning was to turn it on.*
- *Going to bed by 12:00 each evening before he had a class.*

Eddie and SEE specialist wrote the steps of his new routine down on a card, which Eddie agreed to post on his refrigerator and try to follow over the next week. By developing a standard routine for each evening before Eddie had school, and minimizing the number of things he needed to do in the morning, Eddie was able to reduce some of the chaos in his life, and begin making it to class on time on a regular basis.

- **Follow up on the implementation of the coping strategy and make modifications as needed.** Coping strategies often need to be altered after the client has had the chance to try them out on his or her own. When following up the home practice of a coping strategy, the SEE specialist should first evaluate whether the client tried to use the strategy, and if so, whether it was effective. If the client was not able to use the strategy, the SEE specialist should identify any obstacles to using it, and problem solve about them accordingly. Practicing the coping strategy again, ensuring that the plan to practice it is clear and specific, and checking that the client believes that using the coping strategy will be helpful can all increase the chances that the client will try to use it on his or her own. Developing prompts to practice the coping strategy, such as written prompts or verbal prompts from a family member or other significant person, can overcome failure to practice due to forgetting the assignment.

Specific Coping Strategies for Cognitive Difficulties

In this section we briefly describe the coping strategies that can be taught to help clients reduce problems related to difficulties in concentration and attention, thinking speed, memory, and planning, organization, and problem solving. More complete descriptions of the strategies, and examples, are provided in the client handout.

Improving Attention and Concentration

For many clients, difficulties with attention and concentration are their most important cognitive difficulties. Without good attention, learning cannot take place, nor will the individual be aware of important things demanded of him or her. For example, if a student spaces out towards the end of a lecture and misses the homework assignment, he or she will be unlikely to adequately prepare for the next class. Fortunately, there are many strategies for improving attention and concentration, and in combination they can often be very effective.

Strategies for improving concentration include a combination of *environmental modifications*, *self- regulation strategies*, and *scheduling rest breaks*. Environmental modifications are aimed primarily at reducing distractions in the person's environment in order to facilitate focus on the task at hand. These modifications can be combined with prompts for specific activities, such as posting the steps of a particular task that the individual needs to work on. Preparing a special place to work or study, and a personal routine to support it combines the strategies of modifying the environment with personal self-regulation for optimal results. The more an individual has developed a routine around doing his or her work or studying, the easier it will be to focus on those tasks in the course of the routine. Scheduling periodic rest breaks, rather than the person waiting until he or she loses concentration on a task, can reduce wasted time, and set the stage for gradually shaping the capacity for focused attention by increasing the periods of work between rest breaks. Self-regulation strategies such as saying the steps of the skill out loud can help individuals stay focused on a task in settings in which all distractions cannot be completely removed.

As noted in the handout, a variety of factors can contribute to problems with attention that should also be evaluated if it is a major problem. These problems include:

- Medication side effects (e.g., sedation)
- Reduced interest in the school or work topic
- Anxiety
- Depression
- Hallucinations
- Troubling thoughts, such a suspiciousness or thinking that others are talking about the person
- Substance abuse
- Health conditions (e.g., poorly managed diabetes)

Strategies for addressing factors contributing to problems with attention are summarized in the Handout in the table “Other Factors that can Interfere with Attention and Concentration.”

Improving Thinking Speed

Increasing the speed with which individuals are able to initiate and complete tasks is one of the most challenging areas for improving cognitive difficulties. The most effective approach to improving the thinking speed of individuals who need to perform tasks faster is helping the client repeatedly practice the task to the point where it becomes as “automatic” as possible. In other words, the more familiar and the more practiced the client is with a task, the less he or she has to think about each step of it, and the more rapidly it can be completed. The role of over-practice as a strategy for increasing thinking speed can be explained to clients as based on the principle of how all complex (or multi-step) skills are learned and how expertise at a skill is developed, such as driving a car, playing a sport, or musical instrument. When first learning these skills, each step must be carefully thought about, which is why people who are in the early stages of learning a skill are slow at it. However, with repeated practice of the skill, the steps gradually become automatic, the person need not think of the steps anymore, and the overall speed at which it can be done gets faster and faster.

In order to increase thinking speed fast enough to meet work or school demands, additional practice is often needed outside of the work or school setting. For example, in order to get faster at completing timed tests, the student needs to practice writing on a regular basis (e.g., daily, on assignments created by him /herself, the SEE specialist, or the teacher), designed specifically for the purpose of practice. Repeated practice of the task will increase the speed of completing the task, but also requires significant motivation to follow-through on the part of the client.

For some tasks, the problem of slow thinking speed can be compensated for by finding more efficient ways of completing the task. In addition, when the individual is slow to complete tasks, it is important to evaluate whether the person remains focused on the task but is slow at completing it, or whether problems with attention and concentration are at the root of the slow task completion.

Improving Memory

There are four general approaches to addressing memory problems, all of which can be effective at either improving memory or reducing problems related to limited memory. First, strategies for improving initial attention to the information to be learned are critical, because if a person never attends in the first place, he or she will never learn the critical material. Strategies for improving initial attention are mainly covered in the topic area on attention and concentration.

Second, helping the individual organize his or her work or study environment, and establishing a routine around it, can be effective at reducing memory problems related to not being able to find important things required for work and study. When an individual's work or study environment is organized, all the necessary supplies have an established "home" so that the individual does not have to look for where they were put last. Having a routine for work or study tasks, and sticking to the routine, makes it easier for the individual to remember what needs to be done, and to go from one step to the next without getting distracted or forgetting what needs to be done next.

Third, since nobody's memory is perfect, the use of memory aids, such as carrying around a paper and pencil, using alarms, posting the steps of the skill, and keeping an appointment book are all ways of ensuring that the person can access important information without having to remember it all. Fourth, memory mnemonics or making associations can be helpful, especially for remembering small bits of information such as someone's name or a parking space.

Improving Planning, Organization, and Problem Solving

Poor planning ability can be effectively addressed by teaching a combination of strategies, including how to use a personal schedule or planner and regularly engaging in planning every day. By setting aside time to plan, either the night before or at the beginning of the day, the individual can identify the most important tasks that he or she wants to accomplish, prioritize those tasks, and write them down in order to ensure they are completed. Clients may benefit from prompts to engage in planning, as well as some help in doing it initially in order to get the hang of it. These same planning skills are often used by people without psychiatric difficulties, and therefore learning how to use them can be presented in a normalizing fashion.

For many individuals, helping them solve unexpected problems at work or school is a significant challenge. There are several approaches to addressing this need. Whenever possible, if a potential problem or recurring problem can be identified, the SEE specialist can work with the client to develop a standard solution to each of the problems. This solution can then be practiced, and implemented. For example, standard solutions can be identified for problems such as a customer at a store trying to buy an item on which the price has clearly been mismarked, a student not understanding a homework assignment for class, or a pizza delivery person having a car breakdown while trying to deliver pizzas.

Another useful strategy is to help the client identify someone at the workplace or school who can help him or her solve any problems that arise. That person can be a supervisor, a coworker, another student, a teaching assistant, or the teacher. In order to facilitate the client's ability to use a local problem solver, it can be helpful to review with the client what a “problem” is regarding their work or school to ensure correct and rapid identification of problems as soon as possible. For example, not being able to complete work tasks, missing important tools or supplies to complete work tasks, getting a poor performance report at work, not doing well on quizzes or tests, or frequently completing homework assignments incorrectly could all be defined as problems that require special attention.

Sometimes problems can be most effectively solved by the SEE specialist working with the client to address the problem in a systematic, step-by-step approach. The handout includes a worksheet for conducting a 6-step approach to problem-solving and recording progress for each of the steps. The steps of problem solving include:

1. Define the problem as specifically as possible.

2. Brainstorm possible solutions to the problem.

3. Evaluate the advantages and disadvantages of each solution.

4. Select the best solution or combination of solutions.

5. Make a plan to implement the solution(s).

6. Set up a time to follow-up on the implementation of the plan, and conduct additional problem solving as needed.

With some clients, repeated practice of the six steps of problem-solving eventually enables them to use this skill on their own. Other clients may require continued assistance in using the problem-solving format to successfully address problems. Aside from the SEE specialist, other people may be able to help the client use the steps of problem-solving, such as family members, other significant persons, or the IRT clinician.

It should be noted that the step-by-step problem-solving approach described in the handout is the same basic approach to solving problems that is taught in the Modified Intensive Skills Training (MIST) component of the Family Education program, and in the IRT module Dealing with Negative Feelings, in the Action Plan Worksheet included in the topic area “Cognitive Restructuring for Negative Feelings”.

Addressing Problems Related to Symptoms

As described earlier in this chapter, symptoms such as depression, anxiety, hallucinations, and delusions (i.e., “troubling thoughts” or “worrisome thoughts”) can all interfere with pursuing or performing at work or school. Table 1 describes problems related to work or school that could be due to common symptoms. The presence of any of these problems should trigger the SEE specialist to evaluate more closely whether the client is experiencing one or more of those symptoms.

Table 1 - Signs of Symptoms that May Interfere with Pursuit of Work of School Goals

Symptom	Sign
Depression	• Frequently late or missed appointments. • Reduced productivity at work or inefficient studying. • Loss of interest in work or school goals. • Loss of concentration, forgetting, absent-mindedness. • Sad appearance (e.g., expression, voice tone). • Slowed responses to environmental demands.
Anxiety	• Frequent procrastination or avoidance. • Uncomfortable, anxious around others at work or school. • Visibly tense, nervous (e.g., fidgeting, shaky, worried or fearful facial expression, pacing). • “Scattered” thinking—difficulty remaining focused. • Difficulty performing work or school tasks despite having appropriate skills or knowledge.
Hallucinations	• Distractible, difficulty concentrating. • Talking/arguing with oneself. • Grimacing or other physical responses to internal stimuli. • Appearing “spaced out” and inattentive.
Worrisome Thoughts	• Fearful, anxious around other people (e.g., such as due to concerns that others are watching or talking about the client, that others can read the client’s mind, that people are trying to give the client special messages). • Falsely accusing co-workers, supervisors, other students, or teachers (e.g., of taking things, eavesdropping, plotting against person).
Sleep Difficulties	• Drowsiness at work or school. • Being late to or missing meetings with SEE specialist, work, or classes at school. • Excessive use of coffee or other caffeinated beverages. • Falling asleep on job or while studying.
Low Energy, Stamina	• Easily fatigued. • Slowed motor movements. • Cancellations due to complains of feeling sleepy or tired. • Limited effort on more difficult tasks. • Leaving school or work early.

There are several approaches to assessing whether symptoms are contributing to problems at work or school. First, the SEE specialist can simply inquire directly of the client whether he or she is experiencing some of the symptoms in question. Some examples of probe questions for different symptoms include:

- *"How have you been feeling lately?"*
- *"Have you been feeling down?"*
- *"Do you feel anxious or uncomfortable around others at work or school?"*
- *"Do you feel nervous a lot of the time?"*
- *"Have you been hearing voices?"* If yes, *"What's that like for you? Do they interfere with your ability to focus on work or school?"*
- *"Have you been having worrisome thoughts, such as about other people looking at you, talking about you, or trying to give you a hard time?"*
- *"How has your sleep been lately? Are you able to get a good night's sleep and feel rested in the morning?"*

Second, the prescriber on the NAVIGATE team routinely evaluates symptoms as a part of his or her regular medication management meetings with the client. Prescribers often have accurate, up-to-date information regarding the severity of the client's symptoms. This information can be combined with the SEE specialist's observation of possible symptom-related problems contributing to difficulties at work or school.

Third, the IRT clinician will also often be familiar with the client's symptoms because the IRT program includes teaching a variety of strategies for helping clients cope more effectively with their symptoms. Two IRT modules are of particular relevance to helping clients reduce the interfering effects of symptoms on their work or school goals: the "Coping with Symptoms" module and the "Dealing with Negative Feelings" module. The SEE specialist can check in with the IRT clinician to evaluate whether specific symptoms may be contributing to problems at work or school.

Fourth, the family clinician may have useful information about the client's symptoms based on his or her observations of family members, or from family sessions including the client. Considering that all members of the NAVIGATE team may be privy to special information about the client's symptoms, the most effective way of obtaining more information about the client's symptoms, and whether they are contributing to work or school problems, is to raise the question in a weekly NAVIGATE team meeting.

This provides the opportunity for all members of the team to share their observations and information about the client's symptoms, and for the team to then reach a consensus as to the degree to which symptoms are posing a problem, and what to do about it.

When symptoms are suspected to be interfering with work or school functioning, it is important for the NAVIGATE team members to agree on a plan for addressing those symptoms. Problems related to symptoms can be addressed and reduced in several possible ways. The prescriber may modify the client's medication regimen (e.g., changing the dosage level, prescribing another antipsychotic). The IRT specialist may also address the symptoms by teaching the Coping with Symptoms or Dealing with Negative Feelings modules in the Individualized part of the IRT program, working collaboratively with the SEE specialist to ensure effective practice and implementation of coping skills in the critical school or work settings.

If the client does not actively participate in the IRT program, the SEE specialist can review the clinical guidelines for the Coping with Symptoms or Dealing with Negative Feelings modules of IRT, and use the accompanying handouts for each module to teach the client more effective strategies for coping with his or her symptoms. The educational handouts in these IRT modules are similar to the handout provided in the SEE program on Coping with Cognitive Difficulties at Work or School. This includes questions and worksheets in easy-to-understand language designed to help clients identify problematic symptoms and upsetting feelings. Then, specific coping strategies are described, and in the coping with cognitive difficulties handout, the client selects strategies for addressing a particular symptom. Also, similar to teaching strategies for coping with cognitive difficulties, coping strategies already in the client's repertoire are identified and reinforced, followed by the teaching of additional strategies for managing a particular symptom.

Summary

Cognitive difficulties and symptoms often interfere with the ability of clients to pursue their work or educational goals. Recognizing and addressing cognitive difficulties and symptoms can lead to the development of effective strategies for managing these problems and reducing their interference with work and school. In this chapter, guidelines are provided to the SEE specialist for identifying the possible contribution of specific cognitive difficulties to problems at work and school, and then for developing and teaching effective coping strategies aimed at reducing their effects. The use of an educational handout for clients about thinking difficulties and how to cope with them is described. This handout is included in the Appendix.

Recognizing the effects of symptoms on problems at work or school can be critical to addressing those problems and helping clients achieve their personal goals. The signs of possible symptoms interfering with work or school performance are summarized. When symptoms are suspected of interfering with work or school, the SEE specialist should discuss this matter with the NAVIGATE team, and pool information on symptoms from other team members, such as the prescriber, the IRT clinician, and the Family Education clinician. Common strategies for addressing problematic symptoms are then described, including the prescriber modifying the medication regimen and the IRT clinician teaching skills for coping with symptoms, with the SEE specialist facilitating the generalization of coping skills to the work or school environment. If necessary (e.g., if the client is not actively engaged in IRT), the SEE specialist can directly teach skills for dealing with symptoms, using the handouts and clinical guidelines from the IRT program.

Through careful assessment of the potential contributions of cognitive difficulties and symptoms to problems pursuing work or school goals, and developing effective coping strategies for these problems, many clients are able to successfully achieve their goals, despite continuing to have some cognitive limitations or persistent symptoms.

Chapter 5
Disability Benefits Programs

Disability benefit programs, including financial assistance and health insurance programs, were established to help members of the community when they are having financial difficulties. Several different levels of government agencies, including federal, state and municipal, provide benefits programs in the United States. The majority of benefits programs for people with serious mental illness are found at the federal and state levels.

In this chapter, we provide information about how to help clients decide to apply for disability benefits programs and work incentive programs, and the importance of involving family members and other supporters (with the client's permission) in benefits decisions. In this chapter, we frequently refer to information found in the Appendix, including the following 2010 informational brochures from the Social Security Administration:

- Disability Benefits
- Medicare
- Supplemental Security Income (SSI)
- Working While Disabled—How We Can Help
- Your Ticket to Work

Please note that the Social Security Administration frequently updates their informational brochures. We recommend checking regularly for updates at the following website: http://www.socialsecurity.gov/

The appendix also includes the following two worksheets to help SEE clients in NAVIGATE make decisions about applying for benefits programs:

- Disability Benefits Worksheet
- Work Incentive Programs Worksheet

While the SEE specialist is a key person in helping with decisions about disability benefits, it is also important for all NAVIGATE team members to have some basic information about disability benefits and to be prepared to help clients and family members (with the client's permission) to gather information and sort through their decisions about benefits. To learn basic information about benefits, all team members are encouraged to read chapter 7 ("Applying for Disability Benefits") in the NAVIGATE Team Members' Guide. Team members can learn even more detailed information by reading this chapter.

Benefits Counseling

For the purposes of NAVIGATE, we define *benefits counseling* as assisting individuals and their family members or other supporters (included with the permission of the client) to make their own decisions about what role, if any, the use of disability benefits will play in helping clients to achieve their employment and educational goals. This assistance includes providing clients with accurate and understandable information about the types of disability benefit programs that exist on federal, state and local levels, the eligibility and application processes for these programs, and information about work incentive programs and other options for people who receive benefits.

Work Incentive Counseling

For the purposes of NAVIGATE, we define *work incentive counseling* as information provided by trained professionals (such as staff members at the Social Security Administration office or Certified Work Incentive Counselors) focused on work incentive programs. This information is based on each person's unique and individual situation. Work incentive counseling includes specific information and calculations about what will happen to a person's income or health insurance benefits when they receive a specific income from employment. Work incentive counseling provides individuals with options and choices regarding how their income from employment will affect their existing benefits. Additionally, work incentive counseling provides people with information about income reporting requirements.

You can find detailed information about the regulations and formulas used for work incentive counseling in "Social Security 2010 Redbook: A Summary Guide to Employment Supports for Persons with Disabilities Under the Social Security Disability Insurance and Supplemental Security Incomes Programs" at the following website:

http://www.ssa.gov/redbook/

Please note that the Social Security Administration updates the Red book at least once a year. We recommend regularly checking the website for updates.

Deciding to Apply for Disability Benefits

Information about Applying for Federal Programs'

The federal government pays disability benefits and provides a health insurance program through the Social Security Administration (SSA) that includes the following two separate and distinct *income* programs:

- Social Security Disability Insurance (SSDI) (see the "Disability Benefits" handout in the appendix)
- Supplemental Security Income (SSI) program (see the "Supplemental Security Income" handout in the appendix).

The Social Security Administration also provides a *health insurance* program, Medicare, through the Social Security Disability Insurance program. Information about Medicare is also found in the appendix (please read the "Medicare" handout).

The handouts from the Social Security Administration in the Appendix are designed to provide basic information for clients (and their family members or other supporters) who are considering applying for SSDI and/or SSI. However, they do not provide answers to all questions and do not address each person's specific circumstances. When giving these handouts to clients and family members, it is important for the SEE specialist, or other members of the NAVIGATE team, to offer assistance in reviewing and understanding the information. For specific information about an individual's situation, the client (and family members with the client's consent) should be referred to the nearest local office of the Social Security Administration.

Information about Applying for State Programs

In addition to the programs provided at the federal level, each state in the United States offers both income and health insurance programs. However, the programs, application processes, and eligibility requirements vary from state to state. Most states provide some type of health insurance coverage and income assistance through their programs. The names of the programs vary state by state. For example, some but not all states refer to their health insurance assistance as "Medicaid."

Basic information about these state level programs can be found by accessing the website www.disability.gov/benefits. This website includes links for state specific information about disability benefit programs. We recommend that SEE specialists actively use this website to gather (and print out) information regarding both income and health insurance programs for their respective states. As with the information about federal programs, the SEE specialist and other members of the NAVIGATE team should be prepared to help clients (and family members) review this information when needed. And, once again, this information does not address the specifics of each person's individual situation.

Difficult Decisions

For many people, applying for disability income or other federal or state government funded benefit programs raises complex questions. The process is even more confusing because many of the labels and terms used in our disability programs do not address partial disability or transient disabilities. It is important to keep in mind that clients may choose to apply for disability benefits when they do not feel that they are completely disabled, but they need some assistance from a program. For example, a client who is experiencing psychosis may choose to apply for Social Security benefits and Medicaid, even though he plans to attend college and develop a career path.

Concerns about accessing disability programs are especially pronounced during early adulthood, when one's life plans have involved being educated, a member of the work force, and financially independent. Many people in the NAVIGATE program will be confronted by these dynamics.

It is important for SEE specialists to remember that the Individual Resiliency Training (IRT) clinician and the Family clinician will be working with clients and their family members (or other supporters) to help them with processing the experience of having a psychotic episode, and how this may (or may not) affect immediate and longer term plans. This work will also be useful to clients and family members as they consider the possible role that government benefits may play in their lives. SEE specialists working closely with other NAVIGATE team members are in a position to provide effective supports and information sharing related to decisions about benefits, school, work, and careers.

For many clients, the question about the presence of a disability or a partial disability may be confusing. For example, it is possible for people to apply for disability benefits to help them to get some income or health insurance, even though they don't see themselves as being totally disabled. Therefore, the SEE specialist's goal is to provide accurate and individualized information to aid people's decisions about how using benefits can be most helpful to them. Some clients in SEE decide to apply for all possible disability benefits, others apply for only some disability benefits, and still others decide not to apply for any of these programs.

Many clients and their family members find the process of applying for and determining eligibility for health insurance and income assistance to be confusing, frustrating, and perhaps even embarrassing. This process is made even more challenging by the changes and stresses in their lives brought about by the presence of psychosis. Some clients may hesitate to have their family involved in discussions about benefits. It is important for SEE specialists to review with clients the potential advantages and possible drawbacks of involving their family members in such discussions and including them in the planning process.

In all aspects of the NAVIGATE program, clients receive assistance in making their own decisions and following through with them. One of the key goals of the NAVIGATE program, and especially of SEE services, is to help people move ahead with their goals related to work and school, regardless of the status of their disability benefits. For example, a client in the NAVIGATE program may choose to apply for Social Security Disability Insurance (SSDI, a federal government program) and Medicaid (a state program for health insurance), while at the same time working on continuing his or her career by attending classes or applying for jobs.

Assisting a client and his or her family with decisions about disability benefits requires coordination, support and collaboration from all NAVIGATE team members. This process should not be approached without the support and input of all team members. Keep in mind that the Family clinician and the IRT clinician will be working with clients and families to help them learn more about psychosis, process their experience, and consider the possible longer term impact of this experience on their lives. The viewpoints of both the client and family will impact decisions about disability benefits.

NAVIGATE staff should have access to basic information about Social Security programs, Medicare, Medicaid, and other income, health insurance, and housing assistance programs. Some agencies that provide NAVIGATE programs may already have designated staff members that help people through the benefits application process. These staff members may be known as “benefits specialists“ or by other similar titles. Some agencies may have case managers or other staff who are trained in benefits applications. It is crucial that SEE specialists are aware of such resources and connect clients and family members with internal agency resources in the process of deciding about and applying for benefits.

When specially trained staff members are not available within an agency (or within the larger organization that the agency belongs to), NAVIGATE staff should be as familiar as possible with the application process and the most effective ways to access information and services in the local area.

All SEE specialists should have basic knowledge about disability benefits (including work incentive programs) and be familiar with the pros and cons of applying for and receiving benefits. Each NAVIGATE team member should also have some fundamental knowledge about disability benefits and about where to access specialized resources within the NAVIGATE team or the larger agency. As noted in the introduction to this chapter, other NAVIGATE team members can find information about benefits by reading this chapter and by reading chapter 7 in the NAVIGATE Team Members Guide.

While the process for applying for federal programs, such as Social Security Disability Insurance (SSDI) and/or Medicare, is generally the same from state to state, the process for applying for state programs such as Medicaid varies widely. It is not expected that NAVIGATE team members will be experts in all the details of applying for benefits, or using a work incentive program, or providing benefits counseling or work incentive counseling. However, It is expected that NAVIGATE staff will work closely with clients on an “as needed” basis regarding benefits issues.

As part of helping clients make decisions about benefits, a Disability Benefits Worksheet has been developed for the NAVIGATE team to use with clients and family members (see worksheet in the Appendix). Not all clients starting SEE need or want to have discussions about benefits. Some clients may already be working and have sufficient income and health insurance. They may enter into SEE services not wanting to apply for benefits. Other clients may want to focus only on education because they have started with a school or course and have access to the financial supports or health insurance coverage that they need through family or other means.

Some clients may be highly ambivalent about applying for disability benefits. For these clients, it will be useful for the SEE specialist to work directly with them to help them identify and explore the sources of their ambivalence. Additionally, effective SEE specialists also help clients with plans or strategies to address some of their identified areas of ambivalence.

A Work Incentive Programs Worksheet is also included in the Appendix as a tool for NAVIGATE team members to help clients make decisions about applying for such programs.

Using the Decisional Balance Matrix

The “decisional balance matrix” or “pay-off matrix” is a practical tool to help people identify the pros and cons of decisions about which they feel ambivalent. This tool is especially relevant for clients who are unsure about applying for disability benefits. The decisional balance matrix helps clients evaluate the pros and cons of applying for benefits as well as the pros and cons of *not* applying for benefits. A blank copy of the decisional balance matrix is included in the Disability Benefits Worksheet (see Appendix).

For many clients, it is useful to sort through the potential pros and cons of applying for disability income or health insurance benefits with someone they trust, such as the SEE specialist and/or a family member or significant other. This tool will help the SEE specialist, the client, and any family members the client wants to include to sort through the potential pros and potential cons of applying for disability benefits.

For each area of the matrix, the SEE specialist helps the client to identify and record their thoughts about the pros (advantages) and cons (disadvantages) of applying for benefits and likewise for *not* applying for benefits. On the following page there is an example of a decisional balance matrix that was completed collaboratively by a client and SEE specialist to help the client explore his thoughts and feelings about applying for benefits.

Example of a Completed Decisional Balance Matrix

<table>
<tr><td>Pros (Advantages) of Applying for Benefits
Consider possible pros, such as providing an income, providing health insurance, increasing independence, increasing ability to help with household expenses, help getting back on my feet, decreasing stress, people with expertise can help me</td><td>Cons (Disadvantages) of Applying for Benefits
Consider possible cons, such as lack of knowledge about application process, taking a lot of my time, difficulty completing forms, inconsistent with my beliefs about what it means to receive benefits, may limit the amount of work I can do</td></tr>
<tr><td>More income
Get health insurance</td><td>Lots of paperwork
I may not get approval, all this work for nothing
Not sure if I could still get a job</td></tr>
<tr><td>Pros (Advantages) of Not Applying for Benefits
Consider possible pros, such as increasing my incentive to work, saving time that I could use for something else, more consistent with my beliefs about what it means to receive benefits</td><td>Cons (Disadvantages) of Not Applying for Benefits
Consider possible cons, such as continuing to have problems with money and insurance, staying under stress, not knowing other ways to get an income or insurance</td></tr>
<tr><td>More motivated to work
Feel more productive
Makes me look for a job faster to get more income</td><td>No income if I do not get a job
Not sure how I would pay for physical or mental health services</td></tr>
</table>

In using the decisional balance matrix, it is important to keep in mind from the start that people make a variety of different choices after completing it. For example, “Sheila” decided although applying for benefits would help improve her current income, she felt more strongly that not applying for benefits would serve to motivate her to get a job sooner, which was important to her. On the other hand, using the decisional balance matrix helped “Cody” decide to apply for benefits because it would help him get health insurance coverage through Medicaid or Medicare, whereas “Harry” decided against applying for benefits because he had other resources and had a strong belief that he would not be a productive member of society if he collected benefits.

There are several additional points to keep in mind when using the decisional balance matrix. First, the matrix is person-centered; it illustrates the client’s thoughts, ideas and concerns about the decision, not the view of the SEE specialist or other people in the client’s life. While input from family members and others can very helpful, it is ultimately the client who decides which pros and cons are included in the decisional balance matrix. Second, concerns about benefits may be listed in more than one part of the matrix. For example, the client may list “increasing my finances” as a pro of applying for benefits because benefits such as SSDI provide an income. At the same time, she may also list “increasing my finances” as a pro of *not* applying for benefits, because she thinks that if she doesn’t receive benefits she will look for a job faster, which would also increase her income. Clients should be encouraged to identify all issues, concerns, fears, etc. and include them in the matrix, even if the identified concerns seem to “conflict” with each other. Clients also may identify on the matrix key areas for which they need more information.

It may take some time to fill in the matrix depending on the client’s stage of making a decision about benefits. An SEE specialist may start completing the decisional balance matrix with the client, and together they may agree on a mutual task for the client to complete it at home after discussing it with family members. Or they may work on the matrix together for several sessions. It is a good idea for both the client and the SEE specialist to keep a copy of the matrix as they work together.

In helping a client complete a decisional balance matrix about applying for benefits, the SEE specialist may notice that the client has omitted some potentially important factors. The SEE specialist can inquire about whether such factors might be relevant to him or her in the decision making process.

For example, an SEE specialist working with “Alex” noticed that he had not included independent living as a potential factor in making his decision about applying for benefits. The specialist first asked Alex if he would like to hear about one common thought about applying for benefits. When Alex agreed, the specialist said, “*Alex, you said that you do not want to apply for benefits now because you are living at home and do not need the income. However, you also told me earlier that you would like to live on your own in the next six months because you would like to be independent. Therefore, a ‘pro’ of applying for benefits for you may be that the potential income from a disabilities program would help you achieve your goal of living independently. Am I correctly* *stating your intentions?"* When "Alex" said "yes," the specialist asked him if he wanted to include these issues on the matrix. As another example, an SEE specialist may ask the client if the issue of having health insurance to pay for medications is part of his or her decision-making. If the client decides this issue should be included, the SEE specialist then asks where it would go in his or her matrix.

In the case of using the matrix to consider the decision of applying for benefits, it is also important to identify areas where individuals may want more information. For example, an SEE specialist may ask a client if he or she is interested in obtaining more information about work incentive programs that help people receiving benefits obtain employment. Or the SEE specialist may ask individuals if they would like more information about different ways to pay for mental health services at the agency.

The decisional balance matrix can also be used to help clients in making other decisions in the NAVIGATE program, such as those involving taking medications, engaging in a weight loss program, going back to school, learning skills for connecting with people, developing resiliency skills, etc. Also if a client is unsure about participating in other interventions of NAVIGATE, the SEE clinician can suggest using a decisional balance matrix to explore the pros and cons. For example, a client may be reluctant to participate in IRT. If he or she experiences difficulties in the classroom related to traumatic memories of having a psychotic episode in high school, the SEE specialist may suggest using the decisional matrix about whether to contact the IRT clinician to get some help in processing the psychotic experience. In the process of completing the matrix, the specialist may ask the client if he or she is familiar with the IRT modules "Processing the Psychotic Episode" and "Dealing with Negative Feelings," both of which are focused on helping clients understand their psychotic experiences, tell their own story, and challenge self-defeating thoughts and beliefs. Once the client is aware of the skills that can be gained from these IRT modules, he or she may decide to list them as a "pro" of working with the IRT clinician.

When using the decisional balance matrix, it is imperative to keep in mind that the matrix displays the client's view. It is not the job of the SEE specialist to change the client's view, but rather to make sure that he or she has accurate information and is identifying all the pros and cons. The decisional matrix is not designed to make decisions *for people,* but rather as a tool to help people identify for themselves things that go into their own decision-making process, based on their own individual concerns, preferences, and goals.

The decisional balance matrix is often an effective way of helping people to factor in several different, and perhaps conflicting facts and feelings in their decision making process, even if they do not have all of the answers. Some people will decide they need more information about some issues before making a decision. For example, rules about how work income affects benefits are complicated and some clients may need these rules explained several times and in a combination of formats, such as verbally and visually, in order for them to understand it well enough to decide how this information fits into the decisional balance matrix.

Work Incentive Programs for People Already Receiving Benefits

Information about Work Incentives for Federal Programs

Some clients in NAVIGATE services may already be receiving income and/or health insurance through federal programs or the Social Security Administration. For these clients, having basic information about work incentive programs may help them make decisions about starting, returning to, or continuing with employment. Many of the work incentive programs for people receiving SSDI or SSI are described in the appendix (see the handouts “Working While Disabled: How We Can Help” and “Your Ticket to Work.”) These documents provide basic information about work incentives for people receiving SSDI and SSI benefits.

It is crucial that clients who are receiving benefits from the Social Security Administration participate in accurate work incentive counseling from a trained professional that addresses the person’s unique situation. Staff at the local Social Security Administration office can provide this information. To access information about the nearest Social Security office visit the website https://secure.ssa.gov/apps6z/FOLO/fo001.jsp. There are also Certified Work Incentive Counselors in every state.

Information about State Level Work Incentive Programs

Some clients and households may be receiving multiple different types of benefits including state level programs not covered by the Social Security Administration. Information about some of the work incentives for state level programs such as Medicaid can be found at the website www.disability.gov/benefits.

In situations where clients are receiving multiple disability benefits or state-level benefits, it is critical that they receive work incentive counseling from a trained professional who deals with state-level and multiple programs.

Information about where to access comprehensive work incentive counseling services in each state can also be found at the website www.disability.gov/benefits. To help clients with gathering information, and identifying questions and concerns about work incentive programs, we have provided a worksheet in the appendix (see “Work Incentive Programs Worksheet”).

Involving Family Members, Other Supporters and NAVIGATE Team Members in Benefits Discussions

As described earlier, the client's current household and family members are often key to discussing benefits and making decisions about them. It is important for everyone on the NAVIGATE team to have an understanding of where and with whom the client lives. For example, a client may live with his or her parents in their home. The parents may provide in-kind financial supports (in some cases, room and board is counted as financial support) to the client without giving him or her any money directly. This information will need to be included in the benefits application and may affect the client's eligibility for benefits. With the client's permission, family members (or other supporters) may be included in informational meetings about benefits and/or decision-making meetings. The client may also benefit from having other NAVIGATE team members involved in such meetings. For example, the Family clinician may be working with the client and his or her family concerning financial matters or the possibility of living independently.

For many clients in SEE services, their families may have provided financial and health insurance safety nets. Families may have also served as *de facto* case managers for years. For example, many clients coming into SEE services may already be receiving disability benefits and may have attempted to work since being found eligible for benefits. When they tried working previously after receiving benefits they may have lost their income or health insurance benefits (for example, because they did not use a work incentive program). In these cases, families may have extended themselves to cover health care costs and income needs. In these types of scenarios, the families may appear to be "resistant" to their loved one being employed. It is important to remember that families have legitimate concerns regarding a recurrence of employment difficulties and resulting loss of benefits.

Casting a large net to gather as much information as possible about the individual's circumstances, as well as his or her family's and household circumstances, is an important beginning. Continuing to work together within those multiple contexts is likewise important.

It is also important to consider that the client's situation may change and therefore may warrant a re-examination of previous decisions. For example, individuals may decide they want to apply for Social Security Disability Insurance (SSDI) because they are not working, have no income, and they are not sure that they will be able to get a job. At the same time, the client may be working with an SEE specialist to find employment. If the client finds a job that matches his or her preferences and goals and starts working, the client may decide to stop the application for SSDI as he or she now has a source of income.

Role of SEE Specialist

The SEE specialist plays an important role in the process of helping clients to identify their own questions and concerns about disability benefits as well as accessing accurate information about disability benefits programs. The SEE specialist works in a closely coordinated manner with all other NAVIGATE team members who are working with the client and their family. With the client's consent, an SEE specialist may convene a family meeting that includes family members as well as the Family clinician and the IRT clinician to discuss and share information about the use of disability benefits. The Family clinician may have important concerns or questions from family meetings and the IRT clinician may have some information to share based on the client's processing of the illness. While SEE specialists do not shoulder all the responsibilities for helping SEE clients and families to make decisions about benefits, they are seen as the central staff members in making sure that clients and families have been exposed to a full review of what benefits are available, and how to apply for them. If clients are not participating in SEE services, but want help with benefits decisions and information, then the NAVIGATE team should meet to determine who will take on the central coordinating role for this.

Some SEE clients may choose to manage the information sharing with family members without an SEE specialist present, while other clients may want an SEE specialist to meet with their family, or other supporters, or other NAVIGATE team members regarding benefits. In all situations, it is important for the SEE specialist to actively keep all members of the NAVIGATE team informed about work with clients related to disability benefits while being aware of how other team members may be helpful.

Summary

Deciding whether and when to apply for disability income or other public assistance benefits is a complex process. SEE specialists and other members of the NAVIGATE team help clients and family members or other supporters to identify questions, concerns, and ideas about how to use benefits as well as how to access good information about their options through professional benefits counseling and work incentive counseling. SEE specialists work collaboratively with all other NAVIGATE team members to help clients and their families make informed decisions about disability benefits to best assist clients in achieving their career related goals.

Chapter 6
Disclosure Decisions

Deciding whom to disclose to, and when, where, and how much to disclose about one's mental health symptoms are complex decisions, especially for people who have recently experienced a first episode of psychosis. Whether or not a client is willing to disclose information about participation in the SEE program, and potentially more specific information about mental health challenges, to a prospective (or actual) employer or teacher, has important implications for the role that the SEE specialist plays in helping the client achieve his or her goals. With clients who agree to some disclosure, the SEE specialist can have direct contact with employers or teachers, which can be useful in developing jobs and finding appropriate school programs, as well as providing ongoing work or education supports. For clients who prefer not to disclose, the SEE specialist's role is mainly "behind the scenes" in helping and supporting the client in attaining his or her goals, but not directly advocating for the client with prospective (or actual) employers or teachers.

The decision as to whether a client should disclose to an employer or teacher is ultimately the client's personal choice. However, this decision should be made in consultation with the SEE specialist, after considering the potential advantages and disadvantages of disclosure, and the nature of any disclosure that is agreed upon. This chapter provides guidelines to SEE specialists regarding how to discuss the issue of disclosure with clients, different disclosure options, and the implications of different types of disclosure for the provision of SEE services related to the job or school search and follow-along supports.

Disclosure Options

For the purposes of the SEE program, the term *disclosure* refers to either: 1) the SEE specialist sharing information with an employer or teacher about the client for the purposes of helping him or her to get a job, start an educational program, or obtain assistance and/or supports to be successful at school or work; or 2) the client sharing information about himself or herself with an employer or teacher, often in conjunction with the SEE specialist, for the purposes of getting a job, starting an education program, or obtaining assistance and/or supports in order to be successful at school or work. The specificity of the information that is shared with employers or teachers depends on the client's needs and preferences, and can range from general information about the client's participation in a vocational program to more specific information about the client's symptoms and other mental health challenges. Helping clients decide what type of information they want to disclose is addressed later in this chapter.

The issue of self-disclosure about mental illness is also addressed in the Individual Resiliency Training (IRT) program that is part of the overall NAVIGATE program, in the optional IRT module focused on “Having Fun and Developing Good Relationships.” Disclosure in interpersonal relationships in the IRT program is done by the client alone, whereas disclosure in the SEE program to employers and teachers is done by the SEE specialist, by the client, or by the client and SEE specialist together. However, the issue of disclosure by the client to coworkers or other students at school also has relevance to clients participating in SEE. The SEE specialist can help clients address these issues when they arise by consulting the “Having Fun and Developing Good Relationships” module in the IRT program, and/or collaborating with the IRT clinician in exploring with the client when and how disclose to others at work and school about one's mental health symptoms.

The issue of whether to disclose information about participation in the SEE program, and potentially about mental health issues, can evoke strong feelings in clients. In order to permit decision, clients need to feel comfortable with other people knowing that they are receiving help in achieving their work or school goals, and sometimes about the nature of their mental health problems. In order to ensure that the client’s decision to disclose or not is based on a careful consideration of its potential merits, it is important for the SEE specialist to make the client aware of the different options for disclosure, and to help the client weigh the advantages and disadvantages of disclosing.

Exploring Advantages and Disadvantages of Disclosure

The primary advantages of disclosure are that the SEE specialist can actively help the client get a job or enroll in school by directly contacting prospective employers or teachers, and can facilitate the client’s success at work or school through direct collaboration with the client and employer or teacher. Some of these contacts may occur between the SEE specialist and employers/teachers in the client’s absence, if the client chooses. Some clients appreciate this option, as the SEE specialist can advocate for him or her, and maximize the chances that the employer or teacher will be receptive to the client and his or her interests and needs.

During the job or school search, disclosure can enable the SEE specialist to “sell” the client’s strengths, talents, and interests to prospective employers and teachers, and explain gaps in work or school history, which clients may feel less confident about doing on their own. When the client is working or attending school, disclosure can enable the SEE specialist to advocate with employers or teachers with or on behalf of the client and sometimes to request reasonable accommodations to facilitate the client’s performance.

The primary disadvantages of disclosure from the client’s perspective is that it may involve acknowledging the presence of a stigmatizing condition, mental illness (or mental health symptoms), to another person, thereby increasing the risk of rejection, discrimination, or social disapproval. Clients may be concerned that no one would want to hire them or accept them into a school program, or an employer or teacher would not want to accommodate them if they knew that they had a mental illness. The SEE specialist can help correct some of these beliefs, and provide examples of other clients who have found employers and teachers receptive to them, and who have facilitated the attainment of their vocational or educational goals.

Another perceived disadvantage of disclosure might be related to the client's ability and willingness to acknowledge having a psychiatric disorder, mental health symptoms, or any difficulties at all. Clients vary in their insight into having a psychiatric disorder or mental health symptoms. Clients who do not acknowledge having any mental health related limitations that could interfere with achieving their vocational or educational goals see little reason for disclosing, because they feel they have nothing to disclose. With these clients, it may be helpful for the SEE specialist to explore the potential benefits of disclosing that the client is receiving SEE services, without any specific mention of mental health symptoms or other challenges.

The discussion of the advantages and disadvantages of disclosure should also be informed by considering the different possible levels of disclosure that may be used. Some clients may feel comfortable with only a low level of disclosure about themselves, whereas others may be fine with any level of disclosure that the SEE specialist recommends. Some guidelines for discussing different levels of disclosure are provided in the next section. In addition, the SEE specialist can use the Disclosure Worksheet (Appendix) to guide a discussion with the client about disclosure.

Levels of Disclosure

The discussion of disclosure with the client can be facilitated by the SEE specialist distinguishing between three different levels of disclosure: low, medium, and high disclosure. A *low level of disclosure* is when the SEE specialist (or client and specialist together) reveals to an employer or teacher that the client is participating in a vocational program or is receiving vocational support services, but no information is provided about the nature of the client's problems (e.g., mental illness, symptoms). A low level of disclosure is the minimum degree of disclosure necessary for the SEE specialist to have direct contact with employers or teachers on the client's behalf, either in the presence or absence of the client. An example of a client who opted for a low level of disclosure is provided below.

Case Example:

"Charlene" was interested in working as a paralegal at a law firm. After reviewing the different disclosure options, Charlene decided that she wanted her SEE specialist to contact prospective employers on her behalf. Charlene and her SEE specialist then discussed the level of disclosure that she wanted the specialist to use in her conversations at law firms with potential employers.

Charlene decided to give permission for her SEE specialist to tell the prospective employer, "I work for a human service agency where I help employers find good employees that fit their needs. I work with a young woman named Charlene who is *interested in returning to employment after a period of time being out of work. Charlene receives services from our agency to help her get back to work." In this example, Charlene gave the SEE specialist permission to say that she receives services at a human service agency. Charlene chose this relatively low level of disclosure so that her SEE specialist could contact law firms on her behalf, but revealing little personal information about why Charlene is receiving help in her pursuit of a job.*

A *medium level of disclosure* is when the SEE specialist (or client and specialist together) provides general information to an employer or teacher that the client is recovering from some mental health challenges or has experienced some personal life challenges, but more detailed information is not provided, such as about specific symptoms. Sometimes with a medium level of disclosure the SEE specialist can convey some of the nature of the mental health difficulties the client is working on overcoming, without describing certain symptoms that the client feels embarrassed or self-conscious about. For example, some clients are fine with the SEE specialist explaining that the client is coping with cognitive challenges, such as improving concentration or work speed, but would prefer the specialist not talk about symptoms such as depression or anxiety. Other clients might be fine with the SEE specialist explaining to a prospective teacher or employer that they are learning how to cope with symptoms such as anxiety or low energy, but don't want the specialist to talk about other symptoms, such as depression, hallucinations, or paranoia. A clinical vignette of a client who chose a medium level of disclosure is provided below.

Case Example:

"Nellie" has a goal of obtaining her associates degree in environmental sciences. While Nellie and her SEE specialist were planning how to look for schools, her specialist engaged her in evaluating the advantages and disadvantages of disclosure. Nellie decided that she wanted personnel at the school to know that she experiences some difficulties that could be apparent to them, but she also wanted them to be assured that she could do the work. Nellie also decided that she would like to have her SEE specialist go with her to meetings at potential schools, so that she would be fully involved in the process.

In preparing for how they would introduce themselves at a school meeting, Nellie and her SEE specialist came up with this approach. Nellie would first introduce herself to the school staff, and then she would introduce her SEE specialist, Jan. Nellie let Jan know that it would be okay for her to let the school staff know that Nellie has a mental health condition that sometimes causes her to have difficulty with attention and concentration, and the ability to organize and express her thoughts when she talks in the classroom. Nellie and Jan discussed what types of things to say, or not say, in order to accomplish this. Nellie gave Jan permission to use the terms, "mental health condition" or "mental health challenges," but decided that she did not want Jan to use the term "mental illness." Nellie also let Jan know *that she could say something like, "at times Nellie's thoughts may jump around a bit and she may need a couple of minutes to refocus her thoughts. We are working on helping her improve her concentration and skills at expressing herself, and we don't believe it will interfere with her ability to learn and do well in class." Nellie also gave Jan permission to explain that she works for "an agency that helps people who have had some mental health challenges to overcome them and return to school and work." However, Nellie did not want Jan to describe any other symptoms that she experiences and is learning how to cope with, such as sometimes hearing voices and feeling anxious around other people. Nellie chose a medium of disclosure because she wanted her teachers to know that she is working on recovering from some mental health challenges, but she did not want them to know about her specific symptoms, which she preferred to keep private.*

A *high level of disclosure* is when the SEE specialist (or client and specialist together) provides an employer or teacher more detailed information about the nature of the client's difficulties, such as specific symptoms or impairments. In rare circumstances, a high level of disclosure could involve providing more information about the client's psychiatric disorder, but this is usually not necessary.

Case Example:

"Irving" had a goal of attending a vocational training program to learn how to repair computers. After discussing his career goals with his SEE specialist, Irving decided that he wanted the teachers in the program to know that he sometimes gets very anxious, to the point that he may need to leave the classroom for a few minutes to relax. Irving decided it would be important to arrange in advance to be able to occasionally leave the classroom to cope with his anxiety, and he wanted to make sure he enrolled in a vocational program that would accommodate his needs.

Irving decided that he would like to have his SEE specialist meet with educational programs first to see which ones would be the best fit for him. Irving gave permission to his SEE specialist to say something like, "I work with a young man who is very interested in learning more about computers and especially computer repairs. I am helping him to find a school that will be a good fit for him. While he is smart and very motivated to learn, he sometimes has difficulties sitting in one place for a long period of time because he becomes anxious. He has developed some coping strategies that are effective in helping him manage his anxiety, and they involve taking five minutes to walk around and do some relaxation exercises. I don't think he will always need to do this, but he wants to be up front with vocational training programs about his occasional need to leave the classroom. As I said, he is very motivated and very eager to learn."

Irving chose this approach so that the vocational training personnel would be aware of an important need for him. Thus, this high level of disclosure let the teachers know that Irving occasionally has periods of anxiety that he needs to cope with by temporarily leaving the classroom for brief periods of time.

As may be surmised by the preceding vignettes illustrating different levels of disclosure, two primary factors have a bearing on the preferred level of disclosure for clients who are willing to disclose some information to an employer or teacher. First, when the client's symptoms and psychosis-related impairments are readily apparent to an uninformed observer, and could present an obvious concern to a prospective employer or teacher about the client's ability to perform the job or accomplish school tasks, a higher-level disclosure may be warranted. For example, if the client has very blunted emotional expressiveness (e.g., lack of facial expression, flat voice tone), it could inadvertently convey to a potential employer or teacher that the client is not interested in the job or school. Similarly, prominent depression, anxiety, responding to internal stimuli (e.g., hallucinations), or distractibility could all raise serious concerns in a potential employer or teacher about the client's ability to perform the job or complete schoolwork. In these situations, a higher degree of disclosure can enable the SEE specialist to meet with prospective employers or teachers alone and to prepare them for their first meeting with the client by explaining a little about his or her circumstances, and assuring them that the client is interested in the job or school, and capable of doing the job or schoolwork. This meeting can also assure the employer or teacher that the SEE specialist will be available to help the client succeed at the workplace or school. Thus, more specific information about the client's challenges may be needed in order to prevent a prospective employer or teacher from developing a negative first impression of a client, which can interfere with getting hired for a job or accepted into a school program.

The second major consideration regarding disclosure is the client's comfort with the SEE specialist revealing the information about his or her challenges to a prospective (or actual) employer or teacher. Some clients feel comfortable giving "free rein" to the SEE specialist to provide an employer or teacher whatever information would be most beneficial for getting the job or being accepted into a school program, or succeeding at work or school. Other clients may be reluctant for the SEE specialist to disclose any information about their challenges, but may be willing to disclose their participation in the SEE program. It should be noted that clients may change their preferred level of disclosure over time and with experience pursuing their vocational or educational goals. SEE specialists should stick to the client's preferred level of disclosure in order to maintain their working alliance, and periodically return to discussing the option of disclosure when working with clients who chose not to disclose but experience difficulty landing a job, enrolling in school, or performing their best at a job or school.

Putting Disclosure into the Overall Context of SEE

The process of exploring the issue of disclosure takes place in the context of developing a working alliance with the client, based on identifying the client's vocational or educational goals, and beginning work towards achieving those goals. Throughout this process, the SEE specialist conveys to the client the many different options regarding disclosure, and how the specialist can help the client if he or she chooses to disclose or if he or she chooses not to disclose. While decisions about disclosure are ultimately up to the client, the SEE specialist should also encourage the client to get input from other significant persons when appropriate, such as other NAVIGATE team members and family. Clients have the right to change their mind, either revoking permission or granting permission for disclosure at various points during the employment or school search and follow-along process.

When the client elects to disclose to a prospective (or actual) employer or teacher, the SEE specialist should have discussions with him or her that include the following:

- Who will make the disclosure, the client, the SEE specialist, or the client and specialist together?

For example, the client may want the SEE specialist to be with him or her and to see a potential employer together. In this case, having a clear plan and doing some role-plays will be very helpful for both the client and the SEE specialist.

- What is okay to say about the person (client)?

For example, is it okay to say that the person is participating in the NAVIGATE program, and to describe the NAVIGATE services, including SEE? Should the SEE specialist explain that the person has had some recent challenges, such as having some difficulties with concentration or a mental health condition?

- What is *not okay* to say about the person (client)?

For example, is it not okay to say that the person has a mental illness? Have specific symptoms, such as anxiety, depression, hallucinations, or paranoid thinking? Is taking psychiatric medications? Receives mental health treatment?

In order to put the process of exploring the issue of disclosure with a client into the broader context of the SEE specialist developing a working alliance with the client based on the individual's goals, a more detailed case example is provided below.

Case Example:

"Darren" was working with an SEE specialist, Rachel, to find a job. Darren and Rachel were working on helping him to obtain employment at a local airport, since he had always been interested in working in the travel business. Darren had experienced frequent paranoid thoughts, and had never worked at a competitive job. He was very anxious about what he should say to a potential employer. Darren and Rachel worked out a plan for Darren to put together his resume and ask some people to be references for him. Darren accomplished those tasks. Darren also located a job opening for an airline ticket salesperson at the airport.

Rachel next brought up the issue of disclosure with Darren, in order to determine the best way of approaching the potential employer and to understand his preferences about disclosure. After talking about some of the pros and cons of disclosure, Darren indicated that he wasn't sure, but that he thought he might be able to handle getting the job on his own. Rachel showed understanding of Darren's uncertainty, and respect for his choice, and explained that he could change his mind at any time if he wanted.

Rachel then reviewed information with Darren about how to approach a potential employer. She went over some key principles and skills, such as how to dress for the interview, how to introduce oneself, how to present oneself in a confident and effective manner, what to pay attention to and remember during the interview (e.g., interviewer's name, facts about the company), and how to respond to common questions that are asked in interviews. They also reviewed the use of some of the strategies that Darren had been working on with his IRT clinician to manage his anxiety and paranoid thinking. This included using some simple relaxation exercises as well as using the cognitive behavioral therapy skill of cognitive restructuring. After they discussed how to use these skills to manage his symptoms, Rachel suggested that they do some role-plays to practice his interviewing skills in preparation for a meeting with a potential employer at the airport.

In the first role-play, Rachel played the part of Darren, and Darren played the part of the supervisor of the ticket counter at the airport. During the role-play, Rachel demonstrated some of the interviewing strategies that she and Darren had discussed, and Darren asked Rachel some of the common interviewing questions. They then reviewed the strategies and skills Rachel used in the role-play before switching roles.

In their second role-play, Rachel played the part of the ticket counter supervisor and Darren played himself as the job applicant. During this role-play, Darren became increasingly anxious and frustrated. Rachel stopped the role-play, and gave Darren some positive feedback about what he had done well. Darren told Rachel that he was feeling suspicious in the role-play about what the potential employer was thinking about him, and whether she (played by Rachel) was trying *to deceive him in some way. Rachel gave Darren some suggestions for how he could manage his anxiety and cope with his suspicious thinking, based on the IRT skills he was learning, and they tried several more role-plays. With each role-play, Darren's interviewing skills improved and he reported less distress after completing it. However, Darren indicated that he still did not feel very confident in his interviewing skills.*

After talking this over some more, Darren decided to change his mind about not disclosing to the potential employer. He said that he would like Rachel to make the first contact with the supervisor at the airline ticket counter on his behalf. Darren said he felt that Rachel could be more effective in asking about possible jobs there, and finding out some basic information for him first. Darren felt that this would help him to feel less anxious and paranoid when he got the chance to meet the potential employer later in the process.

Rachel then initiated a discussion about what she would say when she introduced herself to the airline ticket supervisor. Together, they came up with this plan:

<u>Rachel (to employer)</u>: *"Hello, my name is Rachel Roberts. I work with a vocational and educational program at the Aspen Human Services Center. As part of my work there, I help employers in the community connect with people who are interested in becoming successful employees for them. I am here today because I would like to learn more about your airline ticket business to see if I am working with anyone who would be an asset to your company."*

Darren also decided that if the employer asked Rachel if she has any particular person in mind that she may describe him in this way:

<u>Rachel (to employer)</u>: *"I am here because I am working with a young man who is very bright and very interested in working in the travel business. He enjoys talking with people and has a strong passion for seeing different parts of the country. He has asked me to work with him on getting a job. It is very important for him to get a job where he can be successful and work hard. He has asked for my assistance in finding a good job match and helping him to become a thriving employee."*

Summary

The client's decision about whether they want information about their participation in the SEE program and possible mental health challenges disclosed to prospective employers or teachers has important implications for the provision of SEE services. For clients who agree to disclosure, by either the SEE specialist, themselves, or together, the SEE specialist can directly advocate for the client with the prospective (or actual) employer or teacher, including job development or exploring school options on the client's behalf. For clients who do not want to disclose, the SEE specialist plays a "behind the scenes" but still active role in helping the client explore different work or school options, getting prepared for and practicing interviewing, and developing strategies for addressing challenges at the workplace or school.

In order to ensure that the client's decision about disclosure is as informed as possible, the SEE specialist should help the client consider the possible advantages and disadvantages of disclosing. The SEE specialist should also explore different possible options for disclosure, including what is disclosed and by whom. For example, some clients are comfortable disclosing that they are receiving help in a vocational program, but prefer not to disclose information about mental health problems or symptoms. The following points are important when the SEE specialist is helping a client make decisions about disclosure, and how the specialist will work with the client:

- The client is the person responsible for making decisions about disclosure, based on his or her own goals and preferences about how to achieve them.

- The SEE specialist can encourage the client to get input from other people about whether or not to disclose, such as family members and NAVIGATE team members.

- Clients need to understand how their decision about disclosure will affect how the SEE specialist works with them to achieve their school or work goals, including how the SEE specialist will help them if they choose to not disclose.

- Clients may change their mind about disclosure over time and with experience in the SEE program.

- There is no single right answer about whether the client "should," disclose in any particular situation; the decision depends on the individual's preferences and needs.''

Chapter 7
Conducting the Job Search

When the client has identified a job related goal, the SEE specialist begins working with him or her to look for a job that matches his or her preferred area of interest. There are several strategies that can be useful in helping clients find jobs that interest them. Some of these strategies are useful regardless of whether the client chooses to disclose to a potential employer about the presence of a psychiatric condition and his or her participation in the SEE program, other strategies are more appropriate for clients who choose to disclose, while still other strategies are most useful for clients who choose not to disclose. We first describe general strategies for conducting the job search, followed by strategies for clients who disclose, and then we describe strategies for clients do not disclose.

General Job Search Strategies

Some clients will identify some specific jobs that interest them, such as working as a logger, a nail technician (cosmetology), or an elementary school teacher. In these situations, the SEE specialist and the client move onto the job search, while keeping in mind other important client preferences such as location, hours and rate of pay of the desired job. For clients who identify a specific job type, the SEE specialist and the client should then move into reviewing the client's personal strengths and experiences related to the specific jobs desired.

Other clients may identify a broad and non-specific job interest, such as working outdoors, working with computers, or working with children. In these situations the SEE specialist and the client should spend time to generate ideas about specific jobs that match with the client's areas of interest.

There are four steps that can be taken to prepare for initiating the job search: generating examples of specific jobs in the client's general area of interest, reviewing the client's personal strengths related to the job area, reviewing the effectiveness of job search strategies the client has previously used, and activating the client's social support network to identify possible jobs or job leads. Each of these steps is briefly described below.

Identify Possible Jobs in the Client's Areas of Interest

Within any general area of interest there are usually multiple possible jobs, and identifying as many different potential jobs as possible can maximize the chances of the client getting a job that matches his or her interest. Exploring different types of possible jobs may also be useful in clarifying the client's preferences, as some jobs may be more appealing than others, and this process can inform and refine the job search. For each possible job that is identified, the SEE specialist and client can talk about it, and the client can express what he or she likes or doesn't like about the job. The SEE specialist can use a variety of strategies to help the client identify a list of possible jobs:

- Have the SEE specialist contact employers in person, who work in the types of jobs that interest the client
- The SEE specialist and the client can visit employers in the community who have employees doing the types of jobs that interest the client together
- Look in the "classified" section of newspapers to see listed jobs
- Have the client and SEE specialist walk around where the client lives to explore what types of jobs may be available in the client's neighborhood
- Drive or walk around the community to see what places have help wanted ads in their windows
- For clients who need to use public transportation, the SEE specialist and the client can use a public transportation map and arrange to identify areas of the community what businesses that interest the client are accessible by public transportation
- Encourage the client or facilitate informational interviews with people who work in the field or know the field in order to understand the range of possible jobs
- Look at websites for possible job listings
- Look in trade magazines related to one's area of interest, both in regular feature articles and advertisements
- Go to job fairs

Review Client's Personal Strengths Related to Job Area

When a list of specific possible jobs has been generated, the SEE specialist can help the client consider what personal strengths may help him or her land one of them and perform well at it. Developing a list of personal strengths serves two general purposes in the job search. First, helping the client become aware of his or her strengths and can help the individual (and SEE specialist) sell himself or herself to a prospective employer. Second, increasing the client's awareness of his or her strengths can bolster self-esteem and the person's confidence and self-efficacy that he or she can succeed in landing an interesting job. Examples of personal strengths include:

- People skills
- Drive to be a successful employee
- Friendliness
- Attention to detail
- Determination
- Passion for the type of employment
- Good sense of humor
- Flexibility

- Good with computers
- Sensitive to others
- Honesty

Prompting clients to identify and talk about their personal strengths can be powerful because they come from within the person and are thus very likely to be believed. However, many other sources may yield valuable information about client strengths. Other possible sources of information include:

- Prompt the client to ask previous employers or co-workers about his or her strengths and abilities
- Review the client's Career and Education Inventory for previously identified strengths
- The SEE specialist can describe client strengths based on his or her own observations and knowledge of the client
- Ask the client about hobbies, interests, talents, sports and other activities that he or she enjoys and look for strengths in those areas
- The IRT clinician may identify client strengths, because a part of the IRT program involves capitalizing on and building up personal strengths and resiliency factors
- Family members or friends can be interviewed to identify client strengths related to a desired area of work
- Other members of the NAVIGATE team may be able to provide examples of the client's strengths

Discuss Job Search Strategies the Client has Previously Used

Many clients have previous work experience before joining the NAVIGATE program, and discussing effective and ineffective strategies the client used to get jobs can inform the job search process. Identifying strategies that have helped the client find jobs in the past can lead to using similar strategies for the current job search, as there is a concrete basis for being hopeful about the effectiveness of these strategies. This discussion can also be fruitful for either ruling out ineffective job search strategies, or troubleshooting what went wrong in previous attempts. Exploring previously used strategies for getting jobs can also lead to a discussion about whether the client wants to consider trying to get rehired for a job he or she previously had.

Activate the Client's Social Support Network

While the client and the SEE specialist begin looking for a specific job, or the SEE specialist begins formal job development work, it is useful to "activate" the client's social support network to identify potential jobs. In the competitive employment market, numerous jobs are obtained through personal contacts rather than anonymously applying for listed jobs through the usual procedures. Even when a job is listed, having a personal contact (either direct or through a third party) with the prospective employer can often give the individual the edge in getting the job over similarly qualified other people in the applicant field. Furthermore, sometimes jobs that did not previously exist are created when it is known that a person has a particular interest and/or talent in a particular area. Therefore, using one’s social support network to identify possible jobs is an important strategy for helping clients get work in their area of interest.

In order to get the greatest benefit when activating one’s social support network, it is important to let other people in the network know about the client's desire to work, the area of work and types of jobs the client is most interested in, and specific strengths or aptitudes the client has for working in that area. The more people in the client’s network that are aware of his or her specific vocational goals, the greater the chances of identifying a job through these social connections. The following people should be considered when helping the client activate his or her support network:

- Family members
- Friends
- Other members of the NAVIGATE team (e.g., director, prescriber, IRT clinicians)
- Other supported employment or SEE specialists working at the agency
- Former or current teachers
- Alumni organizations (e.g., from college)
- Members of a church, temple, synagogue or other spiritual organization to which the client or the client’s family belongs
- Members of civic organizations in the community such as the Rotary, Lion’s Club or the Elks Club

Discussions about who should be contacted in the client’s social network should also touch on which person (the client or SEE specialist) should initiate the contact. Some clients may be reluctant to talk about their work ambitions with members of their social network. They may feel embarrassed or self-conscious about asking family members or friends if they know of possible jobs in their area of interest because they may not want to "ask for help." Several strategies can be useful in addressing these concerns.

First, it is important for the SEE specialist to explain to the client that activating one’s social network when looking for work is not a strategy reserved for people with a psychiatric disorder or difficulties getting work, but rather is a widely recommended and used job finding strategy for *anyone* who wants to get a job. In fact, using one’s social network to identify and get possible jobs is a standard recommendation in all books, seminars, and courses about how to get a job. Therefore, using one’s social network to help get a job is a common, effective strategy used by everyone who wants work

Second, the client may feel uncomfortable about not knowing what to say to people in his or her social network. To address this, the SEE specialist should first demonstrate in a role-play how to talk about one's job interests to a supportive person, and then engage the client in some role-plays practice having these kinds of conversations. After each role-play, the SEE specialist should provide some positive feedback to the client about what he or she did well, followed by one or two suggestions for how to be more effective (if applicable), which can be addressed in a subsequent role-play.

Third, if the client is still ambivalent about talking to members of his or her social network about interest in working, SEE specialist should help the client make a list of the pros and cons of having such discussions. Drawing up this list may facilitate identifying and addressing concerns or misapprehensions the client has about having these discussions (e.g., not wanting to seem “special” or ask for help). This list can also serve to remind the client of the advantages of getting a job, such as interesting work, more money, or a step towards one’s career, which can tip the balance in favor of the client being willing to talk to these individuals.

Job Search Strategies for Clients Do Not Disclose

Many clients who have experienced a first episode of psychosis do not choose to disclose information about the presence of a psychiatric condition or their involvement in the SEE program to prospective employers. While this decision sometimes changes over time, it is important for the SEE specialist to respect the client’s decision. In these situations, the SEE specialist plays a "behind the scenes" but still very active role in helping the client find a job.

After possible jobs have been identified and the client’s social support network has been activated for potential job leads, there are two general tasks the SEE specialist can help clients with to facilitate their getting a job: identifying and applying for jobs, and preparing the client for the job interview.

Identifying and Applying for Jobs

Some people believe that people are hired into jobs only when they respond to publicly advertised employment opportunities in newspapers or over the internet. However, experts agree that numerous people across the country are hired into jobs even when no such job has been publicly advertised. In some cases, as many as one-third to one-half of people hired obtained their jobs when no such position was publicly advertised. Sometimes employers have not yet listed jobs, at other times they may be reluctant to advertise for jobs depending on the circumstances. In order to be as effective as possible in helping clients to obtain employment, SEE specialists must provide in person job development with employers in their communities. Thus it is important for the SEE specialist to encourage and help the client identify potential jobs beyond simply looking for advertised job openings.

A wide range of listed jobs can be identified and applied for, with the SEE specialist playing the role of helping the client identify possible sources for job leads (e.g., newspaper job ads, web listings, job fairs, applying directly at businesses, looking for stores that advertise for hired help). Applications that the client can complete at home or on the Internet can be reviewed with the SEE specialists to ensure that the client's resume and application presents as strong a case as possible for hiring the person. Creative strategies to unexplained gaps in work and education can be an important resume issue to attend to before a client submits an application for a job.

Clients can sometimes develop possible job leads by requesting an "informational interview" with a representative from a company doing work in the client's area of interest, but which may not be advertising for a specific job. The purpose of an informational interview is to help the client find out more about the nature of the work conducted, the valued characteristics of employees who work at the company, and be employer's perceptions of needs and concerns regarding their business and any need for hired help. Informational interviews can lead to useful suggestions for possible jobs, the identification of potential unmet needs at a company, and the opportunity for a person to highlight their passion and interest in a particular job, with all of these potentially leading to employment interviews and hiring. However, it is important that the client and the SEE specialist understand that an informational interview is not a job interview per se, and the client should keep that in mind to avoid directly asking for work. The SEE specialist can help the client prepare for interviews by conducting role-plays demonstrating and encouraging the client to practice his or her skills for these informational interviews.

Preparing the Client for Job Interviews

Job interviews are an important step on the way to employment, as the interview is often the client's first opportunity to make an impression on the prospective employer, and these initial impressions can be both lasting and influential. The SEE specialist can help the client prepare for a job interview by attending to four general areas: planning for the night before the interview, attending to dress and hygiene before the interview, preparing the client to answer certain questions and identifying questions to ask during the interview, and maximizing the client's social skills during the interview.

Planning the night before the interview. Effective planning for the night before the interview can ensure that the client gets to the interview on time and is sufficiently prepared for it. These plans should include a reliable method for the client to wake up on time (e.g., alarm clock, being woken by family member, phone call from SEE specialist), having directions to the location of the job interview, having a transportation plan for how to get to the interview and back, and assembling everything that the client may need to get to the interview and do well in it (e.g., wallet/purse, bus/subway tokens/pass, personal scheduler, extra copies of resume, a copy of the job listing, list of questions about the job to be asked, paper and pencil to take notes). The SEE specialist and client should review the plans and any checklists that client will before the interview, and involve any other supports if appropriate, to ensure that the plan is in place the night before. Some clients may appreciate a lift from the SEE specialist to the interview, which can also enable the specialist to review the client's preparation for the interview.

Dress and hygiene. The client's dress and hygiene can have an important bearing on the chances of getting a job offer following a job interview. The client's clothes should be clean and clean, and at least as formal as other employers' in the same position at the business, if not more formal. It is best if the client has showered recently (preferably that morning), and has attended to basic grooming and hygiene issues, such as use of deodorant, cleanly shaven or trimmed beard, combed or arranged hair, clipped fingernails, brush teeth, and use of breath mints (if necessary).

Some clients may benefit from a list of dress and hygiene behaviors to attend to in preparing for a job interview. Some clients may also benefit from the involvement of family members or other support people in helping ensure that they look their best for the interview. The SEE specialist can offer to meet with the client before the interview to review his or her personal appearance for the interview.

Using role-plays for interviewing. One of the most effective ways a SEE specialist can help a client prepare for job interviews is through the use of role-plays. Tips for using social skills training to help clients improve their job interviewing skills are provided later in this chapter.

Preparing for questions in the interview. Most employers have a variety of questions they ask during a job interview, and while not all questions can be anticipated, many are relatively standard, and can be prepared for. The SEE specialists can help the client prepare for common questions asked during job interviews, such as:

- Why are you interested in this kind of work?
- Have you done this kind of work before?
- What is your past work experience?
- How would you describe yourself as an employee?
- Do you have any particular skills that would make you good at doing this?
- Can you explain about some gaps in your work or school history?
- Do you have career goals or something that you want to be doing in five years?
- How are you at following directions?
- Are you good at details?
- What attracted you to this particular job?

The job interview is also an opportunity for the client to get questions about the job answered. Employers expect job applicants to ask a least a few questions about the job, and having some questions prepared in advance (and written down, if necessary) demonstrates that the client has thought about the specific job, and is genuinely interested init. Therefore, helping the client come up with a few questions he or she can ask about the job is also useful preparation for the interview. Common questions include:

- What skills do your best employees have?
- What is the pace of the job like?
- What are the busiest times?
- How soon do you need someone to start this job?
- What are the specific responsibilities for this job?
- What is the potential for advancement in this job?
- What does the job pay?
- What is the schedule for this job?
- What is your process for hiring people for this job?

The client should also be prepared to respond to the possibility of a job offer, and preliminary questions to such an offer. Many positions have an established pay range, although some employers may ask clients about their expectations for pay or "pay requirements." Prospective employers also often want to know when a client could start the job. The SEE specialist can help prepare the client for answering these questions, including establishing a realistic rate of pay (if asked), and being willing to provide a relatively soon start date for working.

Social Skills Training for Job Interviews

The term *social skills* refers to interpersonal behaviors that can have an important bearing on an individual's effectiveness in communicating with other people. Social skills can include a range of different behaviors, including *nonverbal behavior* (e.g., eye contact, interpersonal distance, use of gestures, facial expressions), *paralinguistic features of speech* (e.g., voice loudness, tone, and inflection) and the *verbal content* of what is said (e.g., is what the client said relevant to the topic being discussed in the interview?). Clients are often nervous about job interviews, and this anxiety can affect their social skills, and make them less effective interpersonally during the job interview.

The SEE specialist can help the client practice job interviewing skills by role playing job interviews with the client. It is helpful for the SEE specialist to first demonstrate effective social skills during in a job interview with the client in a role-play in which the SEE specialist with the role of the client, and the client plays the role of the employer. To prepare the client for the role of the employer, the SEE specialist can help the client generate a list of questions he or she can ask (as the employer) to the SEE specialist (playing the role of the client) in the interview. After the SEE specialist has demonstrated job-interviewing skills in a role-play, the client is given the opportunity to practice these skills in several role-plays, with the SEE specialist playing the role of the job interviewer. After each brief role-play, the SEE specialist should provide the client with some positive feedback about specific behaviors that he or she performed well during the interview. For example, "You had very good eye contact with me during that role play." After provided some positive feedback, the SEE specialist should identify one or two areas of change that the client could make in order to be even more effective in the interview. Suggestions for modifications in the role play should be made in a positive, upbeat manner, and should focus on the most common, important social skills that are likely to increase the effectiveness of the client skill during the interview. Common, important social skills for improving in role play interviews include:

- Voice loudness (speaking loudly enough so that the other person can clearly hear it)
- Eye contact (looking at the interviewers eyes or somewhere close to the eyes, such as the nose)
- Active listening skills (saying things such as “I see,” “I understand,” or paraphrasing part of what the other person said)
- Occasionally smiling, when appropriate
- Staying on the topic of the conversation

Role-playing followed by positive and corrective feedback and additional role-play to improve social skills is an effective strategy for gradually improving the interpersonal effectiveness of clients at job interviews. For some clients, it may be important to practice role-play interviews on multiple occasions, as social skills are usually learned very gradually over time, and clients benefit from repeated role-play practice, as well as using their skills actual real-world interviews. More information about social skills training, including specific information about job interviewing skills, can be found in Bellack, Mueser, Gingerich, and Agresta (2004).

Some clients have blunted or flattened affective expressiveness (i.e., a non-expressive facial expression or voice tone with little modulation), which can inaccurately convey in an interpersonal situation that the client is not interested in what the other person has to say. This can be problematic in a job interview if the prospective employer thinks the client is not interested in the job because they don’t appear enthusiastic. To some extent, greater expressiveness in facial expression and voice tone can be improved through practice in role-plays, and encouraging the client to demonstrate more responsiveness in facial expression and voice tone when talking with the interviewer. However, there is often a limit to which clients can improve their affective expressiveness For these clients, it is also important to teach them how to verbally express their interest in a job, and their appreciation to the job interviewer for meeting with them, in order to convey a clear interest in the job when it may not be readily apparent from the nonverbal and paralinguistic behaviors alone. Thus, teaching clients how to make clear verbal feeling statements is an important strategy for helping clients with blunted affect convey their interest to prospective employers.

Job Development with Clients Who Disclose

The term *job development* in the SEE program refers to when the SEE specialist plays an active role in helping the client obtain a job through in person contacts with prospective employers in the community. Since direct contact between the SEE specialist and employer requires client disclosure about participation in the SEE program, this term is used here to refer to this situation.

Job development by SEE specialists should usually be done focusing on the specific work goals and preferences of individual clients, rather than generic job development aimed at identifying a range of possible jobs for different clients. However, sometimes in the process of attempting to develop a job for one client, the SEE specialist may become aware of an appropriate job for another client, and that job development activity may thus serve the needs of more than one client.

The primary purpose of the SEE specialist playing an active role in job development is that this person can often be more effective at “selling” the strengths, talents, interests of the client to a prospective employer than the client him/herself. The SEE specialists can also take the opportunity to briefly explain his or her role to a prospective employer in helping the client land and keep a job.

One effective approach to job development is a process that enables the SEE specialist to develop a match between the employer’s needs and the strengths, talents and abilities of the client or job seeker. This process involves three key components. First, the SEE specialist meets a prospective employer to introduce himself or herself to the employer and provide a very brief introduction. The second component involves the SEE specialist learning about the employer’s business and the employer’s staffing needs. The third component involves the SEE specialist helping to facilitate a match between the strengths, talents and abilities of the client who is seeking employment and the employer’s needs, thus leading to a job interview. We provide more specific information about each of these three components below. Additionally, we strongly recommend that SEE specialists read the article “Evaluation of Conceptual Selling as a Job Development Planning Process,” by Carlson, Smith and Rapp (2008).

Meeting a Prospective Employer

The SEE specialist needs to invest time for planning and practicing how to introduce himself or herself, and his or her services, to a perspective employer. Many job developers who work with people who have disabilities describe this part of their job as their “elevator speech.” The goal is for the SEE specialist to introduce themselves, briefly describe the services they provide, and to set up a time to discuss the employer’s needs for employees in the near future. Sometimes, during the initial introduction phase, an employer might have time to move into the second phase, so it is important for the SEE specialist to be prepared to forge ahead, even if he or she had just anticipated that they would only be doing introductions.

Many of the same skills and strategies previously described as being important for the client as a job candidate apply to the SEE specialist when doing job development. An effective SEE specialist is prepared to provide a succinct introduction that embodies both confidence and respect for the employer's time and needs. There is a great deal of information about businesses in all communities that can be found on the internet, at the local chamber of commerce, from business directories and sometimes from local media. These multiple sources of information are important for SEE specialists to use in doing their homework regarding potential employers.

We recommend that SEE specialists practice and hone their skills at introducing themselves to employers by doing role-plays with their colleagues. Some of the basic components of the introduction include:

- The SEE specialist's name and position
- The goal of the services the SEE specialist provides from the employer's perspective
- The SEE specialist's purpose in meeting with the employer
- Demonstrating some knowledge about the employer or business
- Setting up a time to further discuss the employer's needs for employees

An introduction for an SEE specialist might sound something like this:

"Hello Mr. Smith, my name is Lisa Montgomery and I work for Tri-County Human Services (while giving employer your business card) where my job is to help employers find employees that match their hiring needs. I work with a person who has a strong desire to be a good employee and is interested in working in your business. If we are able to secure a good job match, I will continue to provide services to you and your new employee to ensure that the job match is as success as is possible over time. We noted that your business is one of the fastest growing small computer repair companies in the state and you recently expanded with another store."

"I would like to set up a time to discuss our employment services and your hiring needs so that I can make sure that I have a good understanding of your business and what you are looking for when you are hiring employees. This meeting usually takes about fifteen to twenty minutes. Is that something we could schedule a time for?"

It is important to note that the goal of the introduction is not to evaluate if the employer is willing to consider hiring the client, but instead to share some basic information and begin to develop a relationship with the employer. Of course, it is important for the SEE specialist to prepare to answer some questions that the prospective employer may raise at any time. The SEE specialist should develop comfortable and effective responses to these questions and do role-plays with colleagues or business professionals to practice their skills and strategies. Some of the common questions include:

- "Who are the people you work for?"

- “Why are you here instead of the person who wants to work here?”
- “What does your agency do?”
- “What specific types of services or supports do you provide?”
- “How long do you stay involved in this process?”
- “What types of problems do the people you work with have?”
- “What other employers have you worked with in our community?”

Learning About the Employer and the Business

The goal of the second component is for the SEE specialist to learn more about an employer's business, how it works, the types of jobs at the business, the employer's concerns and priorities with respect to running the business, and what types of needs the employer has when hiring people. Once again, doing homework to learn more about the employer or business in advance is crucial as it demonstrates the SEE specialist’s commitment to learning about the employer and their business. As with the other skills and strategies above, it is important for the SEE specialist to be prepared and to do role-plays with colleagues or business professionals in advance. Some of the important questions for this component of job development include:

- “I understand that you repair laptop computers here. What other types of computer repair services do you provide here?”
- “I see your business has been expanding, what parts of your business are growing well”
- “I obviously know you have this store here, do you have other business locations in our community?”
- “I know you hire people here to do the actual repairs on computers, what other types of employees do you have working for you?”
- “What personal traits make for a good employee here?”
- “What types of previous work experience are important for you in hiring?”
- “Who makes decisions about hiring new employees here?”
- “How does the hiring process work here?”
- “Have you had any challenges in hiring employees for specific positions here?”

Some questions to avoid asking during the second part of job development include:

- “Would you be willing to hire a person with a psychiatric condition?”
- “What is your policy about hiring people with criminal backgrounds?”
- “What is your policy on hiring people with disabilities?”
- “Do you have any job openings right now?”
- “What problems do you have with keeping employees?”
- “Do you offer employment accommodations?”

Once again, the SEE specialist should be prepared to answer questions about themselves and the services they provide, as well as questions about their agency and the clients they represent.

Setting Up a Client Interview

After learning more about the types of positions available at the agency, the SEE specialist continues to evaluate and assess what type of job match this may be for the client and employer. At the conclusion of this time, the SEE specialist has different options available to them to help the client obtain employment. The SEE specialist may have learned that the business is not considering hiring any new employees at this time, or may have learned that the employer is very interested in meeting the client for an interview. Based on the SEE specialist's assessment of the situation and the employer's current needs, the specialist has several options available, including:

- Letting the employer know that you are very thankful for the time they have spent with you and you have a person in mind who sounds like a very good match with what the employer is looking for in employees, and then asking the employer if they would like to hear something about that person. In this case, it is important that you have a copy of the person's resume with them. You may be able to set up an interview time on behalf of the client, depending on the business' hiring process.

- Telling the employer that you greatly appreciate the time they have shared with you and that you would like to discuss more about what you have learned today with your client to explore whether the job is a good fit for them. In this case, you want to schedule another time to meet with the employer again briefly to let them know about the client's interest in the job, and (if appropriate and needed) to provide more information about the client, such as a resume or completed job application.

- Letting the employer know that you are grateful for their time and that you have a better understanding of their needs in hiring new employees, but that you are not sure that you have a person who is looking for work that matches with their needs at the current time. In this case, you should ask for permission to contact the employer in the near future if they have a person who fits the employer's hiring needs.

- If the employer is clearly not currently hiring, or not currently interested in learning more about the client, then you might ask if it would be okay to check back with them in a few months to see what their hiring status is then. You might also ask the employer if they would be willing to contact you if a job opening does occur in the near future.

When a prospective employer expresses an interest in the client for a particular job, a job interview is arranged. The SEE specialist can help the client make the best possible impression at this interview by using the same strategies attained in the previous section on “Job Search Strategies for Clients who do not Disclose,” such as social skills training, reviewing basic grooming and hygiene needs, and preparing the client for the night before the interview.

Summary

For clients who want to work, the job search is when the “rubber hits the road” of the SEE program, with a premium place on providing practical help and encouragement in a responsive, timely manner. After the client has identified specific job interests, the SEE specialist guides the job search process by helping the client take the following next steps:

- Identify possible jobs in the individual’s areas of interest;
- Review the client’s personal strengths for obtaining the job and performing well on it;
- Discuss job search strategies that the client has used in the past, and which ones were successful and which were not; and
- Activate the client’s social network (e.g., family, friends, NAVIGATE team members) to identify possible job leads

When the client has chosen to not disclose to prospective employers about his or her psychiatric disorder or involvement in the SEE program, the SEE specialist plays a “behind the scenes” role in helping the person secure a job. This role includes helping clients identify and apply for jobs, and prepare for job interviews. Preparation for job interviews can include strategies such as reviewing basic grooming and hygiene needs, social skills training to improve job interviewing skills, and planning for the night before the interview.

When the client has elected to disclose to prospective employers, the SEE specialist can play an even more active role in helping him or her develop and secure a desired job. One particularly useful job development strategy is for the SEE specialist to first arrange to meet with potential employers alone for the purposes of understanding better the nature of their business and staffing needs, and when appropriate to explore the possible job match with the client’s interests and skills. These meetings provide the SEE specialist with an opportunity to establish a relationship with a prospective employer, to explain the nature of the SEE program, and to “sell” the client’s strengths and motivation to work to the employer in advance of their first face-to-face meeting. Similar to clients who choose not to disclose, the SEE specialist can help clients who disclose make the best possible impression during their first meeting with a prospective employer by helping them be prepared for the meeting in areas such as good hygiene and grooming, strong interviewing skills, and being prepared to answer common question asked during interviews.

Chapter 8
Follow-Along Job Supports

While some vocational programs focus all their efforts on helping people obtain work, Supported Employment and Education (SEE) helps people both obtain and *retain* employment. The goal of follow-along supports is to help clients keep their jobs by identifying potential challenges in advance, and addressing emergent challenges when they arise by using a variety of strategies and skills. The planning process for follow-along supports should start as soon as the employment search is underway. For example, an SEE specialist working with a client who has previously had alcohol use problems may help the client identify the potential challenge to sobriety inherent in working at a job where alcohol is served, such as working in the kitchen of a restaurant. The SEE specialist could also help the client explore the desirability of applying for such a job, and if he or she does apply and get such a job, what follow-along supports would be needed to help the client avoid drinking in order to maintain his or her job.

Prior to the onset of psychosis, some SEE clients have had good experiences with employment while others have had challenges working. Still other clients may have had limited or no work experience, giving them little to draw upon regarding appropriate employee behavior or workplace norms. Regardless of their work history, many clients benefit from learning skills and techniques about what is expected from employees in general (e.g., timeliness, enthusiasm and respect for the job), as well as more specific rules and behaviors for the job they are seeking or have obtained (e.g., restaurant work requires frequent hand washing and hair tied back from face).

Effective SEE specialists should keep in mind that the symptoms and difficulties that often accompany a psychotic illness are not always predictable, and may reoccur despite the best efforts of the NAVIGATE team. So, while some SEE clients may have a strong work history, they may encounter difficulties at work that are related to increased or changing symptoms. It is worth noting that some clients experience symptoms even while they are participating in treatment and using medications as prescribed.

Follow-along supports are designed to anticipate, and optimally avoid, a wide range of problems that can arise on the job in people with mental health challenges. As with all SEE services, follow-along supports are most effective when they are integrated with the full range of NAVIGATE services. Everyone on the NAVIGATE team has a role in providing follow-along supports. Thus, effective SEE specialists work to keep other members of the NAVIGATE team aware of the client's progress and challenges related to achieving his or her vocational goals so they can all work together to maximize the best possible outcomes. Furthermore, the SEE specialist works to keep family members and other supportive persons abreast with the client's progress towards goals, either directly, indirectly through the family clinician, or a combination of the two.

This chapter provides guidance for planning and providing these critical supports after the client has obtained a job.

Some Common Employment Challenges

It is helpful to be aware of common challenges that arise for clients when they have obtained jobs. Clients, the NAVIGATE team, and family members being aware of potential challenges regarding job performance, can help prepare strategies to use in advance, *before* a problem becomes so serious that it threatens the loss of the job. Some common workplace challenges for clients with a first episode of psychosis are described below.

Transportation

SEE specialists can help clients explore what transportation resources and options are available to them at the beginning of the job search. For example, a client may state that his or her only source of transportation is public transportation. In this case, the SEE specialist and the client should look for jobs in areas that are served by public transportation, and which have work schedules that accommodate bus and train schedules. For example, it would be difficult for a client who relies on public transportation to arrive on time every day for a job that starts at 5 a.m. when there are no buses or trains running yet.

Some clients may have access to a car or have a relative or friend who can provide rides. However, helping such client to identify a backup plan for transportation before a crisis comes up can be useful.

Disability Benefits

As discussed in Chapter 5, some people in SEE may be receiving disability benefit programs such as Social Security Disability Insurance (SSDI) and participating in a work incentive program, which may require follow-along documentation. Another follow-along support is an advance plan for how income will be documented (most frequently pay stubs must be copied), who will be responsible for keeping track of the plan, and how often income will be reported. Many people with a psychiatric disorder who get work abruptly quit their job when they receive a letter stating that a concern has arisen in the disability benefits program about the client's income from work. Thus, planning in advance for how to handle an upsetting letter from Social Security, should one occur, can be an important follow-along support that can prevent a client from unnecessarily quitting a job.

Workplace Socialization

For some clients, workplace social interactions (such as with co-workers, supervisors, or customers) can be more challenging than the work tasks themselves. This can be due to lack of experience working or the effects of their psychiatric disorder on social judgment, confidence, or anxiety. When planning supports, it is important to consider how the client's psychiatric disorder could interfere with relationships with coworkers and supervisors. For example, for individuals who are very self-conscious and/or suspicious of others, meeting and working with new people in unfamiliar circumstances may lead them to believe that coworkers are saying bad things about them behind their backs, which could be upsetting and distracting. As with all follow-along supports, the SEE specialist should ask the clients and other NAVIGATE team members for their input on possible challenges in this area and effective interventions that the clients have used previously (such as coping strategies for dealing with worrisome thoughts), or are currently learning, or need to learn.

Other aspects of work related socialization may be a challenge for some clients. For example, a client may have not worked in a place where on Friday afternoon everyone gets together to go out for a drink after work. Or a person may have never been in the situation where everyone from work is invited (and unofficially expected) to attend a holiday party planned on Saturday night at the boss's house. Follow-along supports can help a person plan for how to respond to such situations either in advance or in the moment. For example, an SEE specialist may develop a plan with a client to respond to invitations or requests that he or she is unsure about by saying something like "Thanks for inviting me! I'm not sure of my plans and will get back to you tomorrow." This would allow the client time to talk with a family member, a friend, or their SEE specialist before agreeing to participate in a workplace event that may produce unforeseen complications.

Checklists

It is impossible to have a plan for how to address all the possible situations that may arise on a particular job that might cause the client difficulty. Helping people strategize about how to deal with potential difficult situations can help protect them and their employment. One way to do this is to review a checklist of possible concerns or temporary barriers that may arise related to work, and to identify some options for responding to them. A checklist is provided in the Appendix titled, "Employment Follow-Along Support Checklist." This checklist can be used as a tool to plan for starting work, the first day of work, and for some common speed bumps that may come up on the road to successful employment. Information and plans developed as a result of using this checklist should be shared and reviewed with the supportive persons available to the client, including family members, friends, and members of the NAVIGATE team.

This checklist in the Appendix is meant as a tool to stimulate discussion with the client about his or her employment, to help identify the client's strengths, resources and potential challenges related to work.

When problem areas are identified by reviewing the checklist together, the specialist should engage the client in problem solving, and offer follow-along supports as needed to help resolve the potential problem. Follow-along supports should be developed collaboratively with the client.

To summarize, the SEE specialist works with the client to,

1. Review and assess each area
2. Decide if the client has a plan for each area or wants assistance
3. Then check the corresponding box
4. If the client wants assistance in a particular area, then develop a brief written plan for who will assist the client

Critical Times

Follow-along support should be planned well in advance and designed to manage or address problems before they interfere with the client's performance on the job. Another way to provide the most helpful supports is to ensure that follow-along supports are available in critical time periods when people are most likely to experience work-related problems. The most common times when clients need extra help are either on the first day of work, when they are excited and nervous, or when there are changes on the job and they need to quickly learn and adjust to, including learning how to do new tasks. SEE specialists should plan with their clients how to handle these situations in advance. The more specific the plan is, the more likely it will be successful.

The First Day of Work

Planning for follow-along supports on the client's first day of work can help determine whether the client needs assistance, and help to build up his or her self-confidence. For example, the SEE specialist can arrange to meet with the client both the day before and the day after their first day on the job, and if the client is disclosing, it is often helpful for the SEE specialist be at the workplace for part of the first day of the job

Many clients encounter "surprises" on their first day of work. Clients are less likely to feel overwhelmed by these surprises when they have planned for their first day in advance and they know they have a resource available to them should they need it. Let's take a look at how this may work in the following example.

Case Example

Janine is a 20-year-old young woman who has not worked for three years. Her last job was as a waitress at an ice cream stand. Janine and her SEE specialist, Nancy, had identified an employment goal of working in a warehouse, as Janine was clear that she wanted a job with little customer contact. Janine had also said that she would be interested in learning how to operate a forklift and other small-scale machines frequently used in warehouses.

Janine was hired at a large "box store" which had an extensive storage area attached to the building. Janine and Nancy reviewed several things to expect on her first day, including the requirement that Janine participate in an employee orientation program with the company's human resource manager.

Janine had started taking an antipsychotic medication about six weeks before she started work. Her medication dosage schedule was to take the medication in the morning and about 8 hours later around 3:00 p.m. and once again at bedtime. Because Janine's work schedule was from 1:00 p.m. to 6:00 p.m. three days per week, she decided she would bring her medications with her to work and take them there at 3:00 p.m.

The employee orientation session started with the following comment from the human resource director, "Welcome to working at Bobby's Big Box store. We are proud to be a completely drug-free work place with zero tolerance for having or using drugs in the workplace or during work times." Janine was nervous about her first day and even more nervous when she heard this. She began worrying that perhaps she would be fired for having her medications with her, or for taking them at 3:00 p.m. during work. She was so anxious about this that she was even afraid to ask the human resource director if this was okay. One of the first thoughts that went through her mind was that she should just leave the building immediately before she got in trouble.

Janine thought leaving was the only solution until she reached into her pocket. There she had Nancy's business card with a note on the back saying, "I will pick you up at 6:00 p.m. today so we can talk about how things went at work." Upon reading this and remembering her appointment with Nancy, Janine realized she had some other options. For example, she could call Nancy during her break time, or she could not take her medications at 3:00 p.m. and come up with a plan about what to do next when she saw Nancy.

Fortunately, the planning of follow-along support at this critical time provided Janine with both the support and the resources to stay at work the first day. At the end of her first day of work, Janine let Nancy know of her concerns. They came up with a two-part plan. First, Janine would call the human resource director the next morning to ask if the drug-free workplace policy included prescription medications. Nancy would also work with Janine to set up an appointment with her psychiatrist to see if the timing and dosages of her medication could be adjusted to better accommodate her work schedule.

Critical Employment Times

Janine's vignette demonstrates how the timing of follow-along supports can be as important as the nature of those supports. There are other critical time periods to consider for follow-along support, including, but not limited to, the first week of work, the first day the person receives a paycheck, significant changes in job duties or work locations, or stressful work conditions (e.g., “Black Friday” shopping in a retail store). While the timing of all such events cannot be predicted, planning reduces the chances of job loss due to the unanticipated problem. It is also important to consider all the sources of follow-along support that may be available to clients in addition to the SEE specialist, such as family members, friends, co-workers, a supervisor, or other member of the NAVIGATE team.

Other Important Times

Some individuals in SEE may experience times of the year or specific anniversary dates associated with traumatic events that may produce particularly hard times for them to get through. For example, a person may have a very difficult time during the month in which he or she was in an automobile accident or when a family member died. Or a person may have a very difficult time in the month in which he or she was involuntarily hospitalized for mental health reasons. It is very helpful for SEE specialists and clients to anticipate and plan for such difficult times, and ask others about their observations, and suggestions including NAVIGATE team members and family members.

Changes in Treatment

Medications for the treatment of a psychotic episode can reduce severe symptoms and prevent relapses, which can facilitate the ability of clients to work. However, medication side effects can also interfere with job performance, such as sedation. It may take time to discover the optimal medication and dosage. In addition, it is common for medications to change based on difficult side effects such as weight gain or sedation, in which case new side effects may occur.

Adjustments in medications may have pronounced affects on people’s ability to work. Some medications have side effects that include sedation, or restlessness, or extreme thirst. Clients may not be aware of all of the possible side effects produced by medications that they are taking. It is critical that the SEE specialist is aware of changes in medications before they occur (if possible) or as soon as possible after they occur. The weekly NAVIGATE team meeting is a good place to review any medication changes that are being considered or have taken place.

In these discussions, the SEE specialist should consult with the prescriber to review what side effects or other behavioral changes may result from the upcoming changes in medications. The SEE specialist can advocate for not making the medication change unless it is absolutely necessary if the side effects are known to be troublesome enough to the person to interfere with work. The SEE specialist should review this information with the client and other members of the NAVIGATE team to keep them informed. In some cases, and with the client’s permission, it may be necessary for the SEE specialist to meet with the client and their supervisor to discuss such changes.

Some medication side effects can be managed by minimal accommodations in the workplace. For example, one common side effect of antipsychotic medications is dry mouth, which can be managed by positioning the client close to a water fountain, bringing a water bottle to work, or using mints or chewing gum.

One of the most common changes that working clients request is in regards to their medication regimens. People who are taking medications need to be aware that there are often several options for dosages, timing, and even alternative medications if side effects cause difficulties that affect their work. For example, prior to employment, some clients are not in a routine where they are required to get up early to go to work, so experiencing morning sedation from a medication was not problematic. Morning sedation becomes a problem however, when it impairs the client's ability to get up and get to work on time. This sedation can often be minimized by taking all the medication in the evening or by lowering medication dosage level. The SEE specialist can help the client explore these and other options with the NAVIGATE prescriber.

Dealing with Symptoms and Cognitive Challenges

Persistent symptoms can interfere with job performance and social relationships at work. For example, anxiety can make someone less effective at work because they are preoccupied with their concerns, and can lead to avoidance of important job tasks or social interactions. Depression can slow work performance, and when someone looks depressed people may avoid interacting with them. Paranoid thinking or concerns that others can real ones mind can distract the person from doing their job effectively. Hallucinations can also be distracting and distressing. It is important for the SEE specialist to be aware of the client's symptoms and how they can interfere with work and to work with the client and other members of the NAVIGATE team to ensure that the client's pharmacological treatment (and medication adherence) is optimal, and that the client has effective coping strategies for managing any persistent symptoms (e.g. coordination with the IRT clinician, who may teach coping strategies as a part of IRT).

While it is common in mental health services to focus on a person's mental health diagnosis and corresponding symptoms, it can be equally important to consider the presence of some cognitive challenges that may be present in clients with a first episode of psychosis. For example, some clients may have trouble paying attention or remembering information. Sometimes this is misunderstood as a lack of motivation, when, in fact, the person is trying their best to pay attention at work and remember information they need to do their job. The negative effects of cognitive challenges on working may be as great or greater than the effects of psychiatric symptoms. SEE specialists should always be mindful of this.

In order to plan for this, it is important for the SEE specialist to share and gather information from other NAVIGATE team members related to possible cognitive impairments and strategies for addressing them. Chapter 4 in this manual, Addressing Illness-Related Challenges to Work and School Functioning, provides suggestions for assessing cognitive difficulties as well as strategies for coping with them. The Appendix also contains a handout for clients called Coping with Cognitive Difficulties at Work or

School, which can help the person learn strategies for coping effectively with cognitive challenges in order to be a successful employee.

Benefits from Follow-Along Supports

The primary beneficiary of follow-along supports is the client. Follow-along supports help people to achieve their desired employment goals using a variety of interventions. In the service of the client, follow-along support services are also designed to be helpful to his or her supervisor or employer as well. It is worth noting, however, that this only occurs when the client has given consent for the SEE specialist to have contact with his or her supervisor or employer.

People Who Give Consent to Talk with Employers

Depending on the client's needs and preferences, the SEE specialist may arrange for regular contacts or check-ins with the employer to see how the person is doing on the job. This support is provided only when the client feels it will be helpful to them in the workplace. The focus of these contacts should be on how the person is doing on the job and whether mental health issues (including cognitive challenges) may be interfering with the person's ability to do the job well.

When the SEE specialist has the client's consent to contact the employer, the specialist should also consider having the client present during such meetings so he or she is involved in discussions and decisions that may affect them. Doing this may also strengthen the employer's investment in the client and increase his or her appreciation of the person's circumstances and desire to work. For example, when a young adult shows up for work on Monday morning looking tired and sleepy, the employer may naturally assume that it is due to sacrificing sleep to attend a party on the weekend. It may be helpful for the employer to know that for some people being tired is the result of a medication side effect and that the client and the SEE specialist are committed to working out a solution to address this potential problem.

When SEE specialists and clients work directly with employers they may also problem solve together to make desired improvements. The following example illustrates problem-solving with an employer.

Case Example

> *Irving is a 19-year-old young man who was recently hired to work in a general maintenance position at the Sleepy Hollow Hotel. The hotel owner was happy to hire Irving as he is a hard worker and clearly wants to please the hotel owner with how he performs his job. Irving has been working at this job for three months, and each month the owner has been adding new duties to Irving's responsibilities.*

The most recent duty to be added was the upkeep of the front lawn and gardens near the entrance of the hotel. The owner showed Irving what to do a couple of times, including trimming bushes and weeding flowers beds. After Irving did this task a couple of times, the owner wanted to help Irving do an even better job. When the owner attempted to show Irving how to do the task, Irving felt criticized and asked if he could leave the job early that day. Given that Irving had been a solid employee the owner was okay with that.

When Irving's SEE specialist, Jack, checked in with the owner of the hotel the following week, as he regularly did each week (with Irving's consent), the owner asked for Jack's help in teaching Irving how to landscape the front entrance. The owner explained that Irving is a great employee and he usually fulfills his job responsibilities very well, so he was confused at why Irving became upset the week before.

In this case, Jack asked if the three of them could meet together. Jack also called Irving to ask how he thought things were going at work. Irving told Jack that he was upset about work because he felt he had disappointed Jack by failing to do his job well. He also said he was especially upset because he had been getting more and more new job duties without an increase in the number of hours he worked each week, which was what he wanted.

When Jack, Irving and the hotel owner met together, Jack was able to help Irving share his concerns about his perceived failure to do his job well in relation to landscaping the entrance way. The hotel owner let Jack know that he found his work to be outstanding and he knew that landscaping the front entrance was a new and more complex task. He described this task as involving working with annual and perennial flowers as well as shrubs and other plants.

After some shared discussion and problem solving, Irving and his supervisor reached a mutually acceptable solution. When providing feedback to Irving about his work, the hotel owner would start the conversation with a positive statement about the quality of Irving's work. This solution was possible because of follow-along supports, which served multiple purposes. It allowed the owner to keep a hard-working employee and to help that employee receive feedback to improve his job skills. It also allowed Irving to continue his work and to keep working on getting increased hours and responsibilities.

People Who Don't Give Consent to Talk with Employers

Some people participating in the SEE program may not want to give permission to their SEE specialist to have contact with their employer or supervisor. However, it is important for the client to know that follow-along supports are still available to them, although often different types of support are needed.

In the previous example, Jack had direct contact with Irving's employer as Irving had given his permission. Let's revisit that example and modify it by exploring what could happen if Irving did *not* give permission for Jack to contact his employer.

Case Example

Irving did not give permission to his SEE specialist, Jack, to meet with his employer. However, Irving set up a plan with Jack that they could meet once a week for lunch at a restaurant near the hotel, to talk about how work was going. When they met, Irving let Jack know that he was upset at work because he felt that his supervisor was thinking that he was not doing his job well.

Jack reviewed what happened at work over the last week and asked Irving if he would be interested in coming up with a plan together about some ways to address his problem with his employer. Jack also reminded Irving that his last work review was quite positive. Together, they came up with the idea that Irving would be able to listen better to his employer's feedback if the employer started with something he did well.

They then set up a mutually agreed upon task for Irving to ask to meet with his employer. Irving told Jack that he and his employer had a regular meeting time on Tuesdays. Irving decided he would start the conversation at their next Tuesday meeting by saying, "I really like working here and I want to do well so that I can work here more. Sometimes I am worried that I am not doing my job well enough. Would you be able to let me know how I am doing my job from your view, including the things you think I am doing well?"

Jack and Irving agreed to meet right after work on Tuesday to see how this went. Once again, the follow-along intervention helped Irving to keep doing what he enjoyed for work and helped his boss understand how to best help Irving to continue to learn new skills at work.

Workplace Accommodations

Another employment support function that is often part of follow-along supports is helping people to request workplace accommodations when necessary. This support should be available to all employed clients of SEE regardless of whether or not the person has given permission for the SEE specialist to speak with an employer. By maintaining regular contact with all SEE clients who are employed, the SEE specialist can work as a consultant and advocate for people who may require workplace accommodations.

Case Example

Juan and his SEE specialist noticed that he was having difficulty staying at a cash register for the full length of his four-hour shift at the grocery store. This was the result of Juan drinking lots of fluids because he had a problem with a dry mouth *related to anxiety. The SEE specialist discussed with Juan the option of asking for an accommodation in the workplace and explored different ways to do this. In this case, Juan decided to request a five-minute break every hour from the employer based on his having a psychiatric disability. Juan chose to make his request alone, but he could have decided to ask his SEE specialist to be present.*

Key Strategies for Follow-Along Supports

This chapter has presented many different ways that follow-along supports can be provided to ensure employed clients are successful on the job. It is not feasible for an SEE specialist to provide *all* of the possible supports that would benefit an employed client. Rather, the SEE specialist working with the client should consider three main options: providing supports, identifying supports, and developing supports.

Providing Supports

We have reviewed some ways that the SEE specialist provides supports directly through ongoing regular visits with clients after they are employed. Of course, the nature and frequency of the follow-along supports depends on each person's needs and challenges at their job.

It is also important for the SEE specialist to actively engage all NAVIGATE team members in being supportive of employed clients in their contacts with them. For example, as part of a medication evaluation, a prescriber could ask "how's work going?", or whether the clients' medications are helpful or causing problems at work. An IRT clinician may help the person to develop some coping skills for a stressful situation in the workplace. The family clinician may work with relatives to develop strategies for them to be supportive of the client's employment.

Identifying Supports

Some SEE clients have other people in their lives who are already supportive of them. These people may include family members such as siblings, parents and other relatives. Personal supports may also come from other people, such as a significant other, a member of their clergy, or a close friend.

It is helpful for the SEE specialist to be as aware as possible of all of the client's supportive relationships that may be used to provide follow-along supports. An important source of good information about family and other supportive people is the NAVIGATE family clinician as well as other NAVIGATE team members.

When the SEE specialist establishes with the client that someone has a comfortable and supportive relationship with him or her, the SEE specialist and the client may discuss ways that the person can help regarding work. For example, the client may want to talk to a sibling after supper about how work went that day, ask someone in their household to make sure they get up on time for work, or contact a friend on-line to share work experiences.

Developing Supports

Some clients have friends or family members who have the potential to be supportive about employment, but they may be unsure how to enlist their support. The friends or family members may have had difficult or confusing experiences with the client in the past related to work, or they may not be aware of the clients work and career interests.

Case Example

> *The brother of Natasha, a client in the SEE program, went through several unsuccessful attempts to help her get and keep jobs for several months after developing psychotic symptoms before she started the NAVIGATE program. Natasha did not receive any mental health treatment or vocational services, and as a result her jobs had been very stressful and short-lived. Her brother was worried that if a problem came up on a job that Natasha recently got with the help of her SEE specialist, it would lead to the same disappointing end as in the past. In this case, after checking with the NAVIGATE family clinician, the SEE specialist and Natasha set up a meeting with her brother to discuss the many ways in which Natasha was now much better prepared to work due to the fact that most of her symptoms are now controlled by medication, she is learning about her psychiatric illness and how to manage it, and she is receiving help and support for achieving her vocational goals form the SEE specialist. At this meeting, they also discussed how Natasha's brother could support her in her new job. For example, Natasha said that she enjoyed playing video games with her brother to relieve stress after work.*

The SEE specialist and the client should also explore the possibility of getting support from co-workers. The client may be able to develop some naturally occurring supports at work without any intervention from the SEE specialist. For example, the client could develop a work friendship that included having lunch together in the company cafeteria once a week. It is useful for the SEE specialist to also remind the client that IRT services include information, skills and strategies for building social supports, such as starting conversations with new people and the timing of disclosing personal information to others.

Follow-along supports for employment can take many different forms and are provided by a wide variety of sources ranging from the SEE specialist to other members of the NAVIGATE team to important natural supports for the client. The following tables provide some examples of follow-along employment supports.

Follow-Along Employment Supports from SEE Specialist Outside of Workplace (no disclosure necessary)

- Provide a ride to work and check on how work is going.
- Meet a client for lunch and ask about what is going well at work.
- Provide the client with a ride home after work and ask about what a typical work day is like.
- Meet on the client's day off to see how work is going; ask about social contacts with co-workers.
- Help with coping with cognitive or symptom challenges.
- Check if the client needs help with disability benefits.
- Take public transportation with the client to or from work, and ask how things are going with the client's supervisor.
- Meet the client for a cup of coffee on their way to work, and explore how the NAVIGATE team can be more helpful with work.
- Do some role-plays with the client to develop skills, such as asking their supervisor how they are doing at work or asking for assistance with a problem at work.

Follow-Along Employment Supports from NAVIGATE Team Members Outside of Workplace (no disclosure necessary)

- Presciber asks the client how medications are going at work.
- Family clinician asks what the family members can do to support the client with work.
- Family clinician asks family members about how they think work is going for the client.
- Family clinician asks the client and their family members about having a meal together one night per week after work.
- IRT practitioner asks about what areas of work are stressful.
- IRT practitioner inquires about what coping skills or strategies would be useful for the workplace.
- Director asks the client how NAVIGATE services can be helpful with work.
- IRT practitioner inquires about what the client is doing with their leisure time, and if there are other goals they could work on.

Follow-Along Employment Supports from SEE Specialist at the Workplace (disclosure is necessary)

• Ask the client if they are interested in having a meeting with their supervisor to discuss how work is going.
• Ask the client if it is okay to check with their supervisor and get information on the client's strengths and challenges at work.
• Ask the client if they would like to meet with them during one of their breaks or during lunch at their workplace.
• Meet with the client and their supervisor at the workplace to ask for any needed accommodations or changes to work tasks.
• Meet with the client and their supervisor to clarify work expectations.
• Meet with the client and their supervisor to discuss how the client can improve their work performance and potential for advancement at work.
• Ask if it is okay for the client to show you some of their work tasks at work? Watch for cognitive or illness related challenges.
• Ask the client if they are interested in having you sit in on a performance evaluation or review with supervisor at the workplace.

Summary

Follow-along supports help people succeed in achieving their employment and career-related goals. These supports are individualized for each client in SEE services as they are based on the person's unique circumstances and needs. SEE specialists should offer follow-along supports to all clients who obtain employment. In addition, all NAVIGATE team members (prescribers, IRT clinicians, and family clinicians) have important roles to play in follow-along supports, as do members of each client's natural support system in the community.

Chapter 9
The School Search Process

In this chapter, we focus on the school search process, including helping clients develop their educational goals, effective strategies for helping clients pursue different types of educational goals, delivering services consistent with client preferences, and developing collaborative relationships with school personnel.

Common Issues for First Episode Clients in the School Search Process

First episode psychosis often occurs when people are completing their high school education or starting college. Therefore, most NAVIGATE participants have had recent school experiences. In many cases, schooling has been interrupted by the onset of symptoms. Clients' efforts to follow through with school plans after the onset of psychosis are often associated with multiple challenges, and for many, embarrassing experiences, difficulties keeping up with class work due to problems paying attention and other illness-related symptoms, and even failure. For these reasons, it is an essential first step in the school search that the SEE specialist gently pursue information regarding the client's educational history, and consider the person's current school plans (or lack thereof) in light of what happened to him or her in the classroom in the past. If the client has experienced failure in the classroom, has had upsetting experiences related to being ostracized by classmates, or may be unable to perform at the level achieved prior to the onset of symptoms, then the SEE specialist should consider how the client's history may influence future school plans.

Case Example

> *Jessica was in high school when she experienced a psychotic episode, and had to withdrawal from school due to inability to meet class work demands. Even though she developed good illness self-management skills in NAVIGATE and stated a desire to continue with her educational goal of going to a trade school to become a computer programmer, she was reluctant to do so. She said that she was avoiding classroom situations because she didn't want to be reminded of her past difficult experiences with psychotic symptoms at school, which led to rejection by classmates. She also had concerns that the classroom setting would trigger a relapse of her symptoms; she felt as if the opportunity to graduate from high school and get a good job was "passing her by."*

In Jessica's case, the SEE specialist involved other members of the NAVIGATE team to help her process her experience of having a psychotic episode at school which included distressing memories that were contributing to her avoiding further educational pursuits. The client's Individual Resiliency Training (IRT) clinician helped the client work through her experience and difficult memories (using the module Processing the Psychotic Episode). This enabled her to pursue her educational goals without fear of her past coming back to haunt her.

Case Example

George excelled in high school and college, and was accepted to several highly regarded medical schools. He considered the schools carefully, and chose a smaller medical school in a rural community, which was most consistent with his living preferences. During his first semester in medical school, he began to have doubts about the school he chose. He became increasingly convinced that he should have chosen another school. His doubts grew stronger, to the point that he made many appointments with the Dean of the medical school to discuss his ambivalence about his decision as well as the possibility of transferring to one of the other schools that had accepted him. George also began calling those schools frequently, asking the admissions department if he had made the right decision in the school that he chose. He could not make up his mind whether to stay in the school he chose, or go to another. He became so preoccupied with doubts about his decision that he did not unpack his suitcases, or open his mail. He went to class but was unable to concentrate on class material. He stopped eating, bathing, and changing his clothes.

The Dean of the medical school, became increasingly concerned about George's mental health as well as his poor performance in classes, and called George's parents, who came to the school and took him home. Following enrollment in NAVIGATE, and after his psychotic symptoms decreased, he made an appointment with the SEE specialist, Susan, because he wanted to get a job. He was considering clerical work in a hospital, but was open to suggestions. In the meanwhile, George's parents were bewildered by George's behavior because they had expected him to return to medical school and proceed with his plans to become a radiologist. George did not want to return to school. He said he felt that he lacked the skills to learn as much and as fast as he needed to in medical school. He reported that he felt tired even from reading novels, and that he lacked the stamina to keep up with medical school classes. He was also concerned that he had developed a negative reputation in the school he had withdrawn from, and in other schools that he had called when he was experiencing psychosis.

Susan suggested that she and George use a decisional matrix to review the pros and cons of working vs. going to school. Through using the matrix, it became clear to George that he was more prepared to work, perhaps part time, than return to school at this point, but that he would remain open to returning to school in the future after he had a successful job experience. He felt that working would help him gain confidence and improve his self-esteem. He also decided that it would help to meet with his IRT clinician to discuss his feelings of failing himself and his parents by developing a psychosis, withdrawing from school, and *needing to put his educational pursuits on hold. Susan suggested that it might be helpful if he had a meeting with the NAVIGATE family clinician and his parents to help them understand the factors involved in his decision to work part-time for now.*

As is highlighted in the two previous clinical vignettes, clients who enter NAVIGATE may be at different stages of their education and have had different experiences in their education history. For example, some have completed high school and may be enrolled in college or in a trade school and progressing in their programs without need for SEE supports. Some may have had difficulty completing high school or college and want assistance in re-engaging in educational pursuits. Others may be currently having difficulties completing high school or post-secondary education, and still others may have decided that they are unable to achieve any educational goals.

There are several key decisions in the school search process that should be reviewed in discussions between the SEE specialist and the client, including the educational goal, how the educational pursuits may facilitate the client's longer-term career goals, the client's educational preferences, how the school search will be conducted, and the tasks that the client and SEE specialist will each be responsible for in the school search process.

Effective SEE specialists need to be informed about the full range of different options for school and for conducting school searches and comfortable in offering their skills and services to help clients be successful in their educational pursuits. SEE specialists who are less comfortable or skilled in the school search process may not provide some critical supports, and therefore are less effective. For example, some specialists may be less comfortable speaking with school personnel, such as teachers, on behalf of the client, and thus may not offer this important service.

In order to provide effective school search supports, SEE specialists must be familiar with the variety of educational programs and institutions in their geographic area and have information about the application and admission processes as well as school services that may be offered through the office of Student Disability Services or similar programs.

SEE specialists should also be familiar with the different types of educational options that are available to clients. For example, some clients in SEE may have dropped out of high school because of difficulties such as learning the material, not being invited to study groups with their classmates, or experiencing symptoms noticed by others. Some of these clients may want to obtain a high school diploma, but are not comfortable returning to the classroom. In these cases, the SEE specialist might discuss with the client if they are interested in pursuing a General Education Development (GED) program. A GED program is a good alternative to a traditional classroom setting for completing high school education for people who are reluctant to return to the classroom. The SEE specialist should be informed about local GED programs and how to enroll clients in one that is best suited for their needs.

Developing Educational and Career Goals

What to search for, where to search, and how to find the right educational program or school all depend on the clients' goals and preferences related to their education or career plans. It is important to understand a person's educational goals for both the short-term and long-term. For example, some SEE clients may see the completion of an educational program as a necessary step towards obtaining a particular job. A person may see completing a community college associate's degree in human services as providing her with the opportunity to work in a group home for adolescents. Another person may want a similar associate's degree as a step towards their bachelor's degree in social work, with the ultimate goal of obtaining a Masters' Degree in Social Work in order to practice as a therapist.

SEE specialists should be mindful that clients' educational and/or career goals might change or evolve over time. Some clients may need help in breaking down their long-term goals (e.g., becoming an accountant) into more immediate, short-term goals, which could be broken down into manageable steps. Throughout this process, the SEE specialist should be aware that the client may have limited information about the types of academic supports, resources, and accommodations available through SEE services. When clients learn more about SEE services they often become more optimistic about their future and interested in expanding their goals.

Case Example

Lisa was a 24-year-old woman who joined NAVIGATE and was interested in SEE services. Lisa was recently diagnosed with schizophrenia; however, she had some mental health challenges going back several years. Lisa had completed high school through the help of specialized services at her school. She had an Individual Education Plan (IEP), was coded with some learning disabilities, and had made extensive use of a program called the Resource Room at school.

Since she graduated from high school four years ago, Lisa had continued to live with her family, relying on them for financial, social and other supports. Lisa had worked at a few part-time jobs doing housecleaning and pet sitting for some family friends. Lisa worked at the local Society for the Protection of Cruelty to Animals (SPCA) shelter for about 12 months. One of her favorite duties there was to take dogs to the local veterinarian's office for health checks, vaccinations and other treatments. She enjoyed her job at the SPCA and was disappointed when she lost it due to budget cuts at the agency.

Lisa had also worked for about two months at a local coffee shop. Lisa left that job because she was having increasing difficulty focusing on her work, as evidenced by forgetting to bring customers dishes they had ordered, making mistakes on customers' bills, and spacing out while taking customers' food orders. She had also missed several days of work due to oversleeping.

Upon starting SEE Lisa told her SEE specialist, Stephanie, that she was not interested in going back to work right now. Lisa described her recent work attempt as very upsetting and frustrating, and leaving her feeling "stupid." She said that she now knew that she did not want to work with food service or the public, and that she would prefer a job that was not fast paced, and where she could use her skills working with animals. She explained to Stephanie that a job involving helping animals allowed her to express her nurturing skills, and she wished to go back to school to gain more skills in a field related to helping animals. In fact, she told Stephanie that she wanted to become a veterinarian.

Lisa was very anxious about this idea, as it had been a few years since she was last in school and she had never thought much about continuing her education beyond high school. After she described her interest in becoming a veterinarian, Lisa immediately asked the SEE specialist, "Is this way too much for me to do? I used to dream about being a veterinarian, but I think it requires a lot of schooling, although I don't know exactly what. I don't think I could handle all the years of school for becoming a vet. I don't even think I could make it through all the years of school to be a veterinary technician. I couldn't even handle my duties at the coffee shop."

First, Stephanie explored with Lisa her experience of feeling " stupid" due to mistakes she began making at her job in the coffee shop. Stephanie took the opportunity to explain that cognitive problems, such as forgetting work tasks and problems getting to work on time, are not related to intelligence, but rather are often symptoms of a mental health problem. In fact, these types of symptoms, such as forgetting things and spacing out, appeared to be signs of her developing a psychosis, which the NAVIGATE program is designed to treat. These problems often improve with treatment, but if they continue or recur she should notify the NAVIGATE team.

At this point, Stephanie could have suggested to Lisa that they find a new educational goal, one that Stephanie could accomplish in the near future. If Stephanie took that option, it would have most likely sent many unintended messages to Lisa, including that Lisa should abandon her career aspirations, and opt for a less interesting and challenging career.

Fortunately for Lisa, Stephanie decided to spend some more time with Lisa exploring her career goal. Stephanie suggested that their first short-term goal together would be to learn more about working in a veterinarian's office. In addition, Stephanie offered to work with Lisa on exploring what it would take to become a veterinarian or a veterinarian technician. During this time, Stephanie also reminded Lisa that she and other members of the NAVIGATE team were there to help her achieve her educational and career goals. Stephanie also prompted Lisa to think about which family members might help her explore her career and educational goals.

Over the next three weeks, Lisa and Stephanie set out to learn more about her interests and options. Each time they met, they established some mutually agreed upon tasks for Lisa to do. One such task was for Lisa to contact the veterinarian's office where she worked when she was at the SPCA. She decided to ask if she could come in at lunch time one day to talk about what types of jobs exist there and what types of educational backgrounds were required for different jobs (i.e., an "informational interview"). Before she contacted the veterinarian's office, Lisa and Stephanie role played conversations between Lisa and the staff at the veterinarian's office. Another task was for Lisa to explore local programs that worked with animals, such as pet stores, grooming shops, and kennels.

In her work with Stephanie, Lisa learned that there were three main jobs at the veterinarian's office: veterinarians, veterinary technicians, and veterinary assistants. Lisa also learned that a veterinary assistant job at that office required completion of a program that takes about one year.

Together, Lisa and Stephanie established other short-term goals, such as locating local colleges that offer veterinary assistant programs and then exploring what types of student resources and accommodations were available at each program that could be helpful to Lisa. For this task, Lisa and Stephanie developed a list of important school criteria and then collected information about what was offered in each of these areas by local programs.

They also had a meeting with Lisa's relatives and the NAVIGATE family clinician to discuss Lisa's educational and career goals. As a result of that meeting, one of Lisa's older sisters, who worked as a teacher, offered to help her develop good studying habits.

After ten months of setting and achieving short-term goals, including taking a class at the community college, Lisa was accepted at a local college that provided a diploma program for veterinary assistants. Lisa then started establishing and working towards short-term goals related to performing well in each of her classes.

In this example Stephanie demonstrated several key skills and strategies that are essential to being an effective SEE specialist. First and foremost, Stephanie maintained a hopeful and person-centered approach throughout her work together with Lisa and helped her develop confidence in herself. Stephanie also offered practical help, such as information about local schools and student support services that would help Lisa be a successful student.

Tailoring Strategies to Different Types of Educational Goals

While the school search process may appear to start when the client and the SEE specialist first contact schools, it actually begins earlier, when the client and the

SEE specialist complete the Career and Education Inventory and start to formulate educational goals and preferences, and decide how they will approach the school search.

NAVIGATE is a collaborative and team-based treatment approach. In order to get the most benefit from the NAVIGATE team, it is essential that individual client goals are developed, and that the team is informed of these goals so they can work together in helping the client achieve them. Educational goals are no exception. Some people in NAVIGATE have specific educational goals at the time of the first meeting with SEE specialist, or are already in school. Other clients may want to consider completing a degree or obtaining a certificate from a program as a longer-term goal, and currently prefer to focus on employment. These examples illustrate how the SEE specialist should be prepared to help people who have wide-ranging needs regarding their educational pursuits.

Four types of common educational goals are explored below.

1. When Clients Already Have Clear Educational Goals

When clients already have clear ideas about what they want to accomplish regarding their education, but are not currently enrolled in a school program, the SEE specialist and the client jointly develop a plan on how to search for schools. This includes discussions about disclosure and defining the responsibilities of the client and the SEE specialist. Even people with well-defined educational goals may need assistance and support with the school search because of problems related to symptoms or cognitive functioning, or because of low self-confidence.

When clients already have clear educational goals, the SEE specialist may want to start by reviewing with them how they have looked for schools in the past, what went well and what were challenges for them, and where they think they may have difficulties that would benefit from the assistance of the SEE specialist. Identifying personal strengths and what the client has done well in the past can bolster the person's confidence and show that the SEE specialist appreciates the whole person. Identifying past challenges and anticipating problems sets the stage for considering how supports provided by the SEE specialist can overcome these potential obstacles to the client's educational and vocational goals.

At the beginning of working with clients who have established educational goals, the SEE specialist often takes the role of exploring and developing collaborative tasks with clients. Some examples of possible mutually developed tasks include having clients:

- Develop or bring in their resume
- Develop a list of their personal strengths that are related to school
- Interview other significant people in their life to identify their strengths and talents

- Develop an inventory of potential schools in the area that have programs that match their goals
- Let family members and friends know what type of school they are searching for
- Request academic records from previous schools
- Ask people in their personal support network about their experience with schools

The SEE specialist may also work with clients to help them identify resources for learning more about schools, such as searching the internet and attending open houses/information sessions at schools.

As is always the case with SEE services, the specialist shares the client's educational goal with the NAVIGATE team and enlists their support and ideas about how to make the school search successful for the client. The specialist should also carefully monitor what is happening with the client in relation to the school search plan. For example, the SEE specialist should evaluate if the client is ready and able to move faster in applying to schools, or is able to do so more independently, or if the client is struggling with some facets of the school search process, and may benefit from more help or change in strategy.

Sometimes clients feel confident that they can manage a school search by themselves, but because of symptoms, or cognitive impairment they are not able to follow through with their plans or accomplish mutually developed tasks. If symptoms or cognitive difficulties are a barrier to working with the SEE specialist or following through with the educational plan developed with the SEE specialist, the NAVIGATE team should be consulted regarding their suggestions to help the client get back on track with their educational plans. For strategies to help clients cope with symptoms or cognitive difficulties the SEE specialist should also consult Chapter 4, Addressing Illness Related Challenges to Work and School Functioning, and the client handout Coping with Cognitive Difficulties at Work or School (see Appendix).

2. When Clients Are Already in School

Some clients may be currently enrolled in school when they start NAVIGATE and access SEE services. The SEE specialist should not assume that these clients will not benefit from or not be interested in educational support services. One of the key roles of the SEE specialist is to help people be successful once they have enrolled in school. If the client is satisfied with their current educational activities, the client and the SEE specialist may then focus on other needs, such as increasing the client's confidence at school, evaluating past school experiences to identify ways that may help the client stay in school and perform well, considering strategies for increasing or decreasing the number of courses the client is taking, or anticipating future courses that might be needed.

Case Example

Mark was currently working part-time as a salesman in a retail store. He decided he wanted to go back to school and finish his bachelor's degree in marketing so he could advance to a higher position at the store. He and his SEE specialist, Harvey, searched for schools that offered an undergraduate marketing degree, allowed students to work par- time towards that degree, and had classes at night because Mark worked during the day. The SEE specialist also discussed with Mark the possibility of transferring credits Mark had earned in college in the recent past. Mark was initially reluctant to discuss his past school experiences with Harvey or to attempt to transfer credits. Harvey respected Mark's decision to not discuss his past school experiences, but was concerned that Mark's reluctance to discuss this issue might be related to difficulties at school. Harvey suspected that information about Mark's past school experience would help Harvey identify the types of supports that would most benefit Mark's school pursuits. Thus, Harvey looked for opportunities to get more information about Mark's school history. He did so by asking about Mark's study habits, such as what routines worked for him (e.g., studying in the morning).

In the context of discussing study habits, Mark disclosed that he had to withdraw from school in the past when he began to go to school full-time while also working part-time. When Mark enrolled in more than two classes, he experienced symptoms that interfered with his school performance and work. For example, he stopped sleeping, was irritable, and believed that coworkers and classmates were "trying to steal his brain" because they envied him.

Therefore, when Mark began to take two classes in marketing at a college that offered night classes, Harvey was mindful that he might try to take on too much once he had some success with part time school. After achieving good grades in his two classes, Mark suggested that he add a third class, at which point Harvey asked if he would be open to collaborating on a decisional matrix regarding the pros and cons of taking 2 vs. 3 classes plus maintaining his par- time job. In completing the matrix, Mark decided that the third class would interrupt his current routine of studying in the morning, working in the afternoon, and going to his two classes at night. The third class would cut into his ability to complete his hours at work, and cut into his studying time, which he needed for his current course load. Therefore, he decided to keep his current course load in order to maintain both his grade point average and his clinical stability.

Some clients who are in school are dissatisfied and want to establish new educational goals, such as taking different courses at the same school or transferring to a different school. Most clients in SEE are at a place in their lives where exploring education, work, and career goals are normal and expected tasks. A natural part of this process may be changing one's mind about goals as they work towards them.

It is essential that SEE specialists develop and maintain an open and non-judgmental stance when working with clients on school transitions and changes. SEE specialists should keep in mind that many clients are just starting out on their careers and that changing schools or courses of study are part of a normal process. However, changing schools can also reflect that client's lack of self-confidence, problems related to studying, or concerns about symptoms, rather than a change in interest in a field of study or career. It is important to develop a rapport with clients and to encourage them to let you know when they have concerns about school or are contemplating changing schools.

3. When Clients Do Not Have Current Educational Goals

Some SEE clients initially express no interest in attending school or other educational activities. Some people may have received conflicting or inaccurate information about people with mental health conditions pursuing their educations. For example, they may have been told, "School is too stressful" or "If people have experienced symptoms of psychosis, they can't succeed at school." In these cases, it is not the job of the SEE specialist to convince the client to develop an interest in education or to set an educational goal. Rather, it is the job of the SEE specialist to work with the person, their family members, and other members of the NAVIGATE team to understand the client's decision not to continue their education and to explore whether the person may be benefit from new, more accurate information.

Even after such exploration, some clients may not want to establish an educational goal. Some people may prefer to focus their efforts on employment; others may be at a place where they are not interested in education, but they are also ambivalent about work as well. Maintaining a good rapport with clients and letting them know that they are welcome to change their mind and revisit educational goals at any point during enrollment in the NAVIGATE program is the best way for the SEE specialist to be helpful to them. For some clients, pursuing education may become a goal after their symptoms have stabilized, they have learned more about their psychosis, and they have made progress towards other personal goals in the Individual Resiliency Training (IRT) Part of the NAVIGATE program.

4. When Clients Have Ambitious Educational Goals

While no one can accurately predict what people are capable of, the SEE specialist may nonetheless sometimes send unintended messages to the client regarding their own feelings and our perceptions about which educational goals are realistic and which educational goals are not. It is not the role of the SEE specialist to make or convey judgments regarding the appropriateness or what may seem like overly ambitious educational goals. It is, however, the job of the SEE specialist to help clients explore and understand their educational goals within the context of their current situation.

In the previous example of Lisa, some professionals working with her might have discouraged her from having “overly ambitious” educational goals at the onset. If this had occurred, several undesirable things might have happened. Lisa might have dropped out of the SEE program altogether. Lisa might have internalized unintended messages such as, *“I am not capable of doing something that is challenging,”* or *“I need to lower my expectations of my abilities because I can no longer do what I once wanted to do.”*

Rather than discouraging what may have appeared to be overly ambitious goals Lisa’s SEE specialist (Stephanie) remained focused on what Lisa wanted, and then worked with her to explore and understand her stated goal. For an important and brief discussion of the importance of personal goals and academic accommodations, read the commentary “The Importance of Accommodations in Higher Education” by Elyn R. Saks, J.D., (Saks, 2008), in the Appendix of this manual.

Ambivalence about Educational Goals

Some clients in the SEE program have no clear ideas or direction about what types of education may interest them. It is important to view the client in the context of their educational experiences, such as the impact of experiencing psychosis in past school situations, and to consider how these experiences may have adversely affected their perspective on their abilities and expectations for their future.

Clients may feel that given the choice between education and employment, that work may be a better fit for them. However, some of these clients may be uncertain about what type of school program they should pursue or even what type of role education may play for them in achieving their work or career goals. These clients may benefit from the SEE specialist exploring with them how education could help in their future employment. This exploration should be done in a sensitive and low key manner.

The client may be interested in some type of continued or new educational experience, but remain uncertain about what they want to do. With these clients, starting slowly and using an exploratory approach can be helpful. Helping clients to see a new horizon of opportunities for their own education and growth, through the provision of information and examples of alternative plans for school, can produce amazing results.

Some clients in SEE may want to take a class to see if they can keep up with the demands of a course, while others may want to take a course to learn more about a skill or interest they already have, such as photography or website design. Others may wish to participate in an educational program just for the sake of learning or because their family members and friends have obtained degrees, and they want to fit in with them. All of these pursuits should be aided by the SEE specialist and the NAVIGATE team.

For clients who have experienced difficulties pursuing their educational goals, successfully completing a course at an adult education program, a trade program, or a community college can lead to an increased confidence and an expanded view of educational and career possibilities. The SEE specialist is in a position to provide reinforcement and encouragement for these seemingly modest but important steps in the person's career trajectory. Further, the SEE specialist can help clients who are ambivalent explore options, resources, and supports for learning that may make a difference in how they view the role of education in their career.

Establishing Short-term Goals

In the example of Lisa, her SEE specialist (Stephanie) used the strategy of helping her break down her long-term career goal into short-term goals or steps. In teaching professionals to do effective person-centered planning, trainers frequently site this quotation:

> "A journey of a thousand miles begins with a single step."
> *(Lao-tzu Chinese philosopher (604 BC - 531 BC)*

Helping clients plan and take the first few steps towards a long-term goal is crucial to building hope, self-efficacy and momentum for the individual's continued growth and development. Working with clients to determine the specific steps they need to take and what resources are available to help achieve those steps often produces much more effective results than just talking about long-term goals.

The Role of Preferences in Educational Goals

In the example with Lisa, her SEE specialist (Stephanie) paid attention to Lisa's preferences regarding her goals. Specifically, Stephanie respected Lisa's desire to work with animals, perhaps in a veterinarian's office. Stephanie also paid attention to Lisa's preferences about focusing on education at the current time, and considering employment as a future goal that would follow her education. Another preference that Stephanie noted was Lisa's preference to avoid work in fast food environments. Some vocational rehabilitation providers may have encouraged Lisa to return to working at the coffee shop because these jobs are readily available, and require minimal educational and employment experience. Stephanie, however, took time to explore Lisa's interests and what would be necessary in order to achieve her long-term career goal.

Exploring Educational Options

In the example of Lisa, the SEE specialist also used the strategy of looking at multiple pathways towards an educational goal. A less experienced specialist might have only provided information on the steps involved in achieving a veterinarian's degree, which requires a bachelor's degree and then a Doctorate in Veterinary Medicine, followed by completion of a residency program.

Instead, Stephanie explored with Lisa all the types of jobs a person might do in a veterinarian's office. This strategy had many benefits for Lisa. First, it affirmed Stephanie's confidence in Lisa that she could effectively check this out using some of her own resources. Second, it allowed Lisa to begin to see some of the different careers that involve working with animals. And third, it helped Lisa to appreciate that she already had some relevant experience and contacts in a field that interested her.

Similarly, in the example of Mark, his SEE specialist (Harvey) highlighted the advantages of taking a moderate course load (e.g., 2 classes at a time rather than 3 or 4), thus minimizing the chances of a symptom relapse and associated interference with school.

Considerations in the School Search Process

There is no specific formula for how to help clients develop and achieve their educational and career goals. For some clients, their goals depend on what educational opportunities are locally available; for others, the financial costs of education may be a factor; and for others the admission criteria for an educational program may be the chief determinant.

Helping clients in SEE consider what goes into the educational search process is a key task for the SEE specialist. With the client's permission, it may also be helpful provide this information to the client's family members or other supportive people. Not all characteristics about an educational program are important for everyone, and for some people one or two criteria may be critical. For example, in the above example of George, his preferences were a small school in a rural community. He did not want to go to school in the city.

SEE specialists should help clients explore what they are looking for in a school program. Some things to consider in a school search include:

- What are the admission criteria for the program?
- What accommodations are available in the application process for people with disabilities or learning challenges?
- What are the financial costs of the program?
- What financial aid programs are available at the program?
- What types of accommodations does the school provide for people with disabilities?
    - Are learning materials provided in alternative formats?

- Are extended times for assignments available?
- Are alternative exam formats available?
- Are alternative methods for taking notes, such as audio taping, allowed?
- What is the school policy on health-related absences?

- What is the school's policy regarding disclosure when academic accommodations are required?
- What resources are available through the school's student disability office?
- In general, what is the intensity of academic demands?
- What types of natural supports are available to the client at this program? For example, does the client have family members there or close by? Does the client know alumni from the school or program?
- What are the scheduling options for classes?
  - How does the scheduling fit with accessing treatment services?
  - How does the scheduling fit with working (if the client is employed)?
- What transportation resources are available to get to the school or around the campus?
- What types of learning or information resources are available at the library?
- What types of learning or information resources are available via the Internet?
- What courses are available on the Internet? Are some lectures videotaped or audio taped and posted on line?
- What types of computers, if any, are needed?
- What different types of classrooms are available? For example, what is the average class size? Are there classes for non-traditional students?
- What is the student to teacher ratio?
- What is the availability of tutoring resources?
- What clubs or organizations are part of the school?

- What is the social life of the program, school, or campus like?
- What previous challenges, if any, did the person have with education?
  - What educational supports were or would have been helpful?
  - Are these resources available at the school or program?

Still other considerations in the school search process can be found in “Your Mind Your Rights!” which is produced by the Leadership 21 Committee of the Bazelon Center (Bazelon Center, 2004). Another excellent source of information for people looking at higher education is the document, “Higher Education Support Toolkit: Assisting Students with Psychiatric Disabilities” (Boston University Center for Psychiatric Rehabilitation, 2009). Both of these documents are available on the internet. Many clients benefit from reading and reviewing copies of these documents as reference materials as you work together on a school search.

Summary

When working with clients to help them achieve their educational goals, as with the employment search process, the SEE specialist should be constantly attuned to the client’s goals, preferences, strengths, needs, abilities, motivation, and challenges. In doing so, the SEE specialist should work with the person to determine which tasks the client may take the lead on (such as Lisa contacting the veterinarian’s office to speak with them about jobs there), which tasks may be shared (such as Lisa and Stephanie working together to identify which schools to look at), and which tasks may require the SEE specialist to take the lead. Of course, an additional consideration for the SEE specialist is to be aware of how other NAVIGATE resources (such as a family meeting for George and for Lisa) and community resources (such as Lisa’s sister who is a teacher) may be helpful in this process.

Additionally, when a plan for conducting the school search has been agreed upon, the SEE specialist and the client should take the time to review the plan at regular intervals to evaluate whether it requires updating or modification. In doing so, the SEE specialist should consider whether the client is being asked to do too much or too little, given their current strengths, resources, skills, challenges, and circumstances. Given that all of these factors may change over time, the SEE specialist and client should monitor and modify their plans and tasks on a regular basis to help the clients be as successful as possible in achieving their desired educational goals.

Chapter 10
Follow-Along School Supports

The Supported Employment and Education (SEE) program is designed to help people enroll in an educational program of their choice *and* to help them succeed as students. This frequently involves follow along supports, which help clients address challenges they may experience while pursuing their educational goals.

Clients enrolled in the SEE program will have a wide range of past educational experiences. Thus, the SEE specialist should be prepared to provide a variety of individualized follow-along supports for different educational settings, including the classroom, testing situations, study environments, laboratory settings, office hours with the professor and/or teaching assistant, and meetings with school counselors/academic advisors. Examples of the types of challenges that clients encounter include: finding a quiet place to study at home, figuring out how to work in a team for group assignments, coping with anxiety waiting to get help from a professor, taking exams under time pressure, and taking effective notes in the classroom.

In addition to the wide range of situations in which the client must function in his or her direct role as a student, there are even more tasks associated with school that must be completed. These tasks may include filling out financial aid forms, preparing a daily schedule, getting up on time, choosing classes and signing up for them, arranging transportation to school, learning new computer programs that are necessary for particular classes or assignments, developing a routine for taking medications, and accessing accommodations provided by the school for persons with disabilities.

One of the functions of follow along supports for school is to help a student manage challenges related to coping with symptoms. For example, some clients may be uncomfortable in large classrooms because they have concerns that people are talking about them, or because they are embarrassed that their symptomatic behavior was seen by others in the past at school. Other clients may need information provided more slowly because they need time to think through the material presented in class before deciding what to write down. Thus, the SEE specialist must be aware of the client's particular symptoms and the challenges they may pose in educational pursuits. SEE specialists also need to be prepared to involve the broader NAVIGATE team if the client's symptoms are interfering significantly with schoolwork. For example, some clients may have significant test anxiety that may interfere with their sleep routine and result in increased fatigue, cognitive slowing, and even depression.

In all areas of educational follow along supports, it is important for the SEE specialists to partner with the NAVIGATE team to help the client anticipate symptom challenges and put in place individualized coping strategies for symptoms. Practical strategies for dealing with illness-related challenges, including cognitive difficulties, are described in Chapter 4 (Addressing Illness Related Challenges to Work and School Functioning). There is also a helpful handout for clients in the Appendix (Coping with Cognitive Difficulties at Work and School).

Some Common Educational Challenges

It is helpful for the SEE specialist to be aware of common challenges for clients seeking to further their education. Based on information obtained from the client regarding past educational experience (including obstacles), the SEE specialist should prompt the client's NAVIGATE team to be aware of the individual's potential challenges. Awareness of potential challenges will facilitate taking preventative steps or a more timely response if there is a problem at school (e.g., if the client's symptoms worsen) and optimally *prevent* problems from occurring. In Chapter 8 on follow-along supports for employment, we discussed some common challenges for people starting work, such as transportation, managing disability benefits, workplace socialization, and the need for checklists to prepare for employment. Similar challenges arise in the school setting, as well as some additional ones, such as managing assignments, needing additional instruction/tutoring, recording information in class, taking exams, and using school-related checklists. Some strategies for addressing these additional challenges are provided below.

Managing Assignments

The SEE specialist should have a discussion with the client regarding establishing a routine that will allow timely completion of homework and other class assignments. These discussions can be initiated before classes start, so that the client can begin to consider how to manage his or her time, and to block out time for all of the work related to school that must occur outside of class. In providing follow along supports for this area, the SEE specialist might consider discussing the following issues with the client:

- How will the person record and track assignments?
- Where will the person work on assignments?
- Will the space be comfortable and adequate?
- Will the person need a computer and printer to complete assignments?
- How will the person know if he or she needs help understanding assignments?
- If help is needed, who will he or she ask and when?

If clients have other demands on their time, such as a job or other obligations, it may be helpful to consider with them how they will protect time for their schoolwork. Advance planning will help ensure that the client is aware that school efforts do not end when classes finish for the day, and that homework often needs to be done in the evenings and during the weekend. SEE specialists can help students plan in advance for completing assignments, and prepare them for the possibility that school activities may result in changes in the time they have available for recreation and leisure. The SEE can help some students plan recreation activities to reward themselves for reaching goals related to completing homework assignments.

Case Example

Elsa worked for a tree service company on Saturdays and had started taking classes at a local community college. She expressed concern about completing her homework assignments over the weekends. Her SEE specialist, Peter, suggested that Friday nights could be considered a "school night" and that she could re-schedule social activities for other times on the weekend. Elsa liked this idea because she could get most of her schoolwork done on Friday nights, and following her job on Saturday she could go out with her friends or engage in other enjoyable activities, such as going to a movie, the rest of the weekend.

Needing Additional Instruction or Tutoring

Some clients in SEE benefit from follow-along supports that include additional instruction or tutoring, because some course material may be particularly challenging, or because the client may experience difficulties in paying attention, learning and remembering new information, or taking effective notes during class lectures. As discussed in Chapter 8 (Job Follow-Along Supports), being familiar with the person's educational history and prior stumbling blocks to success can provide very useful information for planning supports.

In reviewing needs for additional instruction and tutoring with clients, it is beneficial for the SEE specialist to normalize such needs. Some clients may be reluctant to ask for special accommodations or extra help because they may feel that people will think they are not good students or not intelligent enough to achieve their educational goals. It may be helpful for them to hear information from an SEE specialist such as, *"learning challenges are not indicative of level of intelligence; they simply reflect different ways of learning new information."* Some people learn best by reading, others by seeing, and still others by hearing information. Many people learn by a combination of these methods. In many classes, first exposure to class material is through verbal presentation. People who have challenges processing verbal information may benefit from additional ways of processing the information, such as having someone help them take notes, listening to audio recordings of the lecture, and reviewing a PowerPoint presentation of the lecture available on a website for the class. SEE specialists may also remind clients that additional instruction and tutoring services are regularly available at almost every school because the need for these services is very common.

Recording Information in the Classroom

Some SEE clients not do well with traditional methods of taking notes in classes. For many people the reasons and potential causes are quite similar to the reasons stated above for people needing extra instruction or tutoring. Some clients may benefit from learning how to take more effective notes. In addition, if this need is identified early in the school search process, then a person may want to inquire about it, such as, *"Are students allowed to audio tape classes?" "What is the process for getting permission to audiotape classes?" "Does your school have a formal process enlisting other students (often with pay) to share copies of their classroom notes for a student with learning challenges?" "Is the information presented in classrooms available in alternative formats, such as on-line?"*

Taking Exams

Exams are a common source of anxiety for many people. If clients have significant anxiety about taking exams, the SEE specialist should have a discussion with them regarding the source of the anxiety (e.g., fears that they will not remember the material; needing more time than usually allotted, etc.) and plan for supports. Difficulties with taking exams may be related to a lack of confidence in taking exams, or how comfortable the person is with the material, or the type of exam (e.g., free recall, essay, or multiple choice). Anxiety about tests may be a function of an underlying anxiety problem that is exacerbated during periods of pressure. Or a person may experience symptoms such as hearing voices putting down the person. Some clients benefit from taking exams in a separate room from others, having extra time to take exams, or by having the SEE specialist or other supportive person present for the exam.

The SEE specialist should enlist the help of the client's NAVIGATE team members to consider different approaches to helping clients cope with illness-related symptoms or cognitive challenges that may be worsened by being tested on learned material.

Using Checklists

It is impossible to have a plan for how to address all the possible situations that may arise at school or in class that might cause the person difficulty. However, it can be helpful to work with clients in advance to identify situations they find challenging and strategize about how to deal with them. One way to do this is to develop a checklist containing common concerns and potential barriers related to school, and begin the process of identifying options for coping with them. Such a checklist is provided in the Appendix of this manual titled, “School Follow Along Support Checklist.” This checklist can be used as a tool to plan for starting school, the first day of school, and for some common speed bumps that may come up during the path to a successful education. Information and plans developed as a result of using this checklist should be shared and reviewed with the supportive resources available to the person including family members, friends, and members of the NAVIGATE team.

This checklist in the Appendix is meant as a tool to stimulate discussion with the client about his or her education, to help identify the client’s strengths, resources and potential challenges related to school. It is not “just a checklist.”

When areas that have challenges or potential problems are identified when reviewing the checklist together, the specialist should engage the client in problem solving, and offer follow along supports as needed to help resolve the potential problem. Follow along supports should be developed collaboratively with the client.

To summarize, the SEE specialist works with the client to,

5. Review and assess each area
6. Decide if the client has a plan for each area or wants assistance
7. Then check the corresponding box
8. If the client wants assistance in a particular area then write a brief plan for who will assist the client

Planning for Critical Times

Follow-along supports should be planned well in advance and designed to manage challenges or difficulties or address problems before they result in undesired complications at school. Another way to provide the most helpful supports is to assure that follow-along supports are available during times when people may be most likely to experience school-related challenges.

First Day of School

Providing follow along supports at critical time periods provides an opportunity to find out if clients need assistance, to encourage them, and to build their confidence. For example, an SEE specialist should arrange for a meeting with a person who is starting school both the day before and the day after their first day of class, and if the person is disclosing, it can be helpful to have the SEE specialist meet the client at school or on campus on the first day. Phone calls and check-in's can also be helpful when an in-person meeting is not feasible.

Many people encounter challenges or difficulties on the first day of school and they may feel less overwhelmed when they know they have supports available to them at preplanned times.

Case Example

On the first day of college, Jake stood in line for hours to obtain his school ID. Because the line was long and moving so slowly, he decided to leave the line and register for classes first, and to come back later to get his ID. He then stood in line for hours to register for classes, only to discover that when his turn came to register, he needed his ID to complete the registration process! Jake had an appointment at the school café with his SEE specialist, Kathy, at 4:00 that day. When he met with Kathy, he told her that he was so frustrated that he would have left campus and never come back if he hadn't had her to talk to.

Critical School Times

The timing of follow-along supports can be as important as the nature of these supports. There are other critical time periods to consider for follow along supports, including, but not limited to, the first day of school, the first week of school, the first day the person receives a grade, changes in course requirements, and potentially stressful school deadlines (e.g., registration, lab reports, class presentations, term papers, mid-term exams, and finals). The school or course schedule (often available on line) is a good source for planning for critical times.

While the timing of all such events cannot always be accurately predicted, planning reduces the chances of problems in school due to unanticipated problems. It is also important to consider and review all the sources of follow along supports for each "critical event" and not limit that support to only the SEE specialist. When possible, get other NAVIGATE team members and family members or friends (with permission) involved in providing supports.

Other Important Times

Some individuals in SEE services may experience stress at particular times of the year (such as holidays), or on specific anniversary dates associated with traumatic events (such as death of a loved one). The associated stress may cause the person to be depressed or to withdraw from daily tasks. Some stressful anniversaries are related to events that occurred as the result of mental health problems. For example, an SEE client may have left school in November when they had some profound difficulties. The person may feel stressed in November of the next year; so increased follow along supports should be planned for this time. Or a person may have a very difficult time in the month in which they were involuntarily hospitalized. It is very helpful for SEE specialists and clients to anticipate and plan for such difficult times and ask others about their observations, including NAVIGATE team members and family members.

Problems Related to Medication

Some changes that affect a person's academic performance may be related to the medications they are taking. For example, many clients in NAVIGATE take medications to reduce symptoms and prevent relapses. These medications sometimes need to be adjusted, either to improve control of symptoms, or to address side effects such as sedation or weight gain. Medication changes may take time to have an effect, or may produce different side effects sometimes *result* in untoward side effects. The SEE specialist is in a good position to notice these side effects, discuss them with the client and report them to the NAVIGATE team.

It is important for the client that the SEE specialist to work closely with the NAVIGATE prescriber and other team members to monitor problems and concerns associated with medications that could affect the client's school performance. When medication changes need to be made, it is important for the SEE specialist to be informed in advance as much as possible (e.g., at the weekly NAVIGATE team meeting).

When there is a change planned in medication, the SEE specialist should consult with the NAVIGATE team to review what side effects or other changes may result. In some situations (e.g., if the side effects are known to be troublesome to the person and/or to interfere with school), the SEE specialist may advocate for not making the medication change unless it is absolutely necessary. The SEE specialist should review any medication changes and possible effects with the client and other members of the NAVIGATE team to keep them informed. In some cases, and with the client's permission, it may be necessary for the SEE specialist to meet with the person and their teacher or school counselor/academic advisor to discuss the effects of medication changes on school attendance or performance.

Some medication side effects can be managed by minimal accommodations at school. For example, many people taking psychiatric medications experience the side effect of dry mouth. The SEE specialists can help clients obtain permission (where it was otherwise not permitted) to eat mints, chew gum, or drink beverages in class to help manage this side effect. Clients can also talk to their prescribers and their dentists about over-the-counter medications and toothpastes that are designed to help with dry mouth.

One of the most common changes in treatment that is requested by students participating in SEE is regarding their medication regimens. Clients who are taking medications need to be aware that there are often many options in terms of pharmacological treatment, including the dosage and timing of taking medications, as well as the type of medication. For example, prior to going to school, some clients were not in a routine where they had to get up early for class, so experiencing morning sedation or sleepiness from a medication was not problematic. Morning sedation becomes a problem, however, when the client returns to school and it interferes with his or her new morning routine. The SEE specialist can help the client explore options with the NAVIGATE prescriber.

Dealing with Cognitive Challenges

It is important to be mindful that many clients in NAVIGATE may experience cognitive difficulties. For example, some clients may have trouble paying attention or remembering information. Sometimes this is misunderstood as a lack of motivation, when, in fact, clients are trying their best to pay attention in class and remember information they need to learn. For some clients, cognitive challenges may present the most important obstacles to school success.

As discussed in Chapter 3 (Engagement, Orientation, and Assessment) and Chapter 8 (Job Follow-Along Supports), a thorough history can help uncover the role of cognitive difficulties in past school difficulties, as well as the cognitive domain(s) that represent the biggest obstacles. This information is critical in planning for school supports. For example, if the client requires repetition of material to adequately learn it, then recording lectures may be a helpful strategy. Or, if the client has attention difficulties, a plan to sit in the front of the class can help minimize distractions from the back of the room where other students are leaving and entering the classroom or talking. It is important for the SEE specialist to gather information from other NAVIGATE team members about their understanding of the client’s cognitive difficulties, as well as getting their ideas about helpful strategies for helping clients cope with or compensate for the problems. Chapter 4 (Addressing Illness-Related Challenges to Work and School Functioning) describes a wide array of cognitive coping strategies. This manual also includes a handout in the Appendix, “Coping with Cognitive Difficulties at Work or School,” to help the person cope effectively with cognitive challenges in order to be a successful student.

Benefits from Follow-Along Supports

The primary goal of educational follow-along supports is to help the client achieve their desired educational goals once they have been accepted into a program or started a class. Follow-along supports are different for each person in the SEE program because they are individualized and based on the person's goals and preferences.

Follow-along supports should be adapted to the person's challenges, needs, and desire for supports. Some clients benefit sufficiently from regular every other week meetings with their SEE specialist to check in on how school is going, whereas other clients may require two or three check-in meetings per week during challenging school times. Follow-along educational supports should be offered to all clients in SEE who are involved in any type of educational experience. Some clients may give permission for their SEE specialist to contact school personnel, including instructors, with the client or on behalf of the client. Other clients may not give permission for this communication. In both cases SEE supports should be provided.

People Who Give Consent to Talk with School Personnel

Some people request the SEE specialist to help directly with specific school related tasks by giving the specialist permission to talk with school personnel. Sometimes, the SEE specialist may arrange for regular contacts, or check-ins with the person's teacher or other designated school personnel to monitor how the person is doing and to adjust supports accordingly. Direct school contact by the SEE specialist is provided only if clients feel it will be helpful to them in their education. The focus of these contacts should be on how the person is doing at school to help determine what supports from the SEE specialist the client may need. In circumstances where the SEE specialist is providing at-school supports, the client should be included in discussions with school personnel and the SEE specialist. This reinforces the collaborative nature of the supports, which are provided only because the client has requested them.

People Who Do Not Give Consent to Talk with School Personnel

Even though some people decide not to have their SEE specialist talk directly with educational staff, they may benefit from follow-along supports and should be informed of all the possible follow-along support options. Regular meetings between the client and the SEE specialist are an important aspect of follow-along supports and provide opportunities to evaluate the value of currently provided supports, and as well as opportunities to identify additional supports. Some clients may be very anxious or unsure about how it would affect their educational experience if their SEE specialist has direct contact with teachers. In this case, the SEE specialist might suggest that the client fill out a Decisional Balance Matrix (see chapters 5 and 6 for examples of decisional matrixes and blank forms in Appendix) to weigh the pros and cons of having their SEE specialist meet with specific school personnel.

Meetings with SEE clients may take place before or after the person is in class, during breaks or mealtimes, in a school library or at home before or after a designated study time. For example, for a student who is having some challenges with homework it may make sense for the SEE specialist to meet the student at the library to evaluate the student's approach to a particular assignment. In this example, the client could be sitting by the door and without being aware of it, looking up every time someone enters or leaves the library, distracting the client from schoolwork. Or if a student is having difficulty with some of the social aspects of school, it may make sense to meet at a mealtime in a place where students interact (such as the cafeteria) in order to observe what happens.

Follow-along supports for clients who do not disclose may take on more of a problem solving and skills training format. For example, let's look at the case of Rosie who is a 20-year-old student at a local community college. Rosie is working with an SEE specialist, John.

Case Example

Rosie decided that she would not be comfortable having staff at the community college know that she was in the NAVIGATE program. With the help of her SEE specialist, John, Rosie started classes at the community college in September. She likes taking two classes, one in web design and one in computer software applications. As part of providing good follow-along supports, John had been meeting with Rosie once a week to see how the classes were going.

At one of their meetings, Rosie told John that she was having increasing difficulties with her web design class. She was confused about how to use one of the programs to set up videos on websites, which was a requirement for a major assignment that was due in a week.

Rosie had been very anxious about this. She was worried that if she told the teacher she did not understand something from a few weeks ago that the teacher would think poorly of her. Rosie was sure that it was her fault that she did not understand the information correctly.

When they met at the student union building, John asked Rosie if she could come up with some ideas about how to work out this problem. Rosie listed two ideas and John added one. Their three ideas were:

- *Rosie could look on-line for information that would help her with setting up videos on websites.*
- *Rosie could ask to talk with the teacher before or after class and ask for some help with setting up videos.*
- *Rosie could ask other students in the class for help with setting up videos.*

Rosie and John reviewed the three ideas and Rosie chose the idea of talking with her teacher. Rosie and John then discussed the best way to do this. Rosie decided upon going to class 15 minutes early and asking her teacher if they could set up a time to meet.

John and Rosie practiced how this would go and did three role-plays, one with Rosie being the teacher and John demonstrating how he might ask for a meeting. In the second role-play, John was the instructor and Rosie practiced asking for help. After, this role-play John gave Rosie some positive feedback about her performance, and some suggestions for how she could be even more effective. They did a third role-play so Rosie could practice incorporating some of John's suggestions into her performance.

Because of the timing of the assignment, John asked Rosie if he could call her after her class on Wednesday to see how it went. Rosie agreed to this. With John's support on problem solving and practicing strategies and skills, Rosie was able to get the information she needed about the assignment and completed it successfully. As a side note, the teacher praised Rosie's comments in class and encouraged her to see her right away if she had questions about an assignment in the future.

If these follow-along supports had not been in place, Rosie probably would have followed her previous pattern of not asking for help when she was confused because of her fears of being judged by others. John's availability and his willingness to help Rosie, while respecting her decision to not disclose, made a big difference in her success with her web design course.

Educational Accommodations

Another educational support function is helping clients request accommodations when necessary. This support should be available to all clients of SEE who are attending school, regardless of whether or not they have given permission for the SEE specialist to speak with school personnel. By maintaining regular contact with all SEE clients, who are students, the SEE specialist can work as a consultant and advocate for clients who may require educational accommodations.

Unlike in the workplace, the process for requesting educational accommodations varies greatly from school to school. Before requesting an accommodation, it is important that the student and the SEE specialist understand the process at the specific school, college or university.

For example, some schools require that a student register with their Disability Support Services (DSS) office in order to request academic accommodations. This process may include a requirement that students be seen by a professional in that office to gather information about the presence of a disability and how the college may best assist the student in their learning. The DSS office may also require documentation from professionals who are involved in the student's treatment.

If the student is uncertain about whether to request accommodations, the SEE specialist and the client can complete a Decisional Balance Matrix (see example in chapter 5 and the blank form in the Appendix) to evaluate the pros and cons of disclosing a disability and receiving school-based accommodations. Either way, the SEE specialist should assist students in understanding how to request educational accommodations and be ready to help people explore the benefits and potential drawbacks of using such a process.

Two helpful articles are: “A Postsecondary Resource Guide for Students with Psychiatric Disabilities” by Pamela Ekpone and Rebecca Bogucki, and “Familiarity With and Use of Accommodations and Supports Among Postsecondary Students With Mental Illnesses,” by Mark Salzer, Lindsay Wick, and Joseph A. Rogers (2008). These articles describe some of the most frequently requested academic accommodations for people with psychiatric disabilities and explore some of the major considerations in the process of requesting accommodations.

Key Strategies for Follow -Along Supports

Educational follow-along supports can take many forms and be exceedingly helpful for clients of SEE who are in school. Supports can be provided in a wide range of settings encountered by students. When determining what support to provide, the SEE specialist should consider three main options: providing supports, identifying supports, and developing supports.

Providing Supports

We have reviewed ways that the SEE specialist provides supports directly through ongoing regular visits with the person before school starts and throughout the time the person is in school. When providing supports, the SEE specialist should adjust them based on the person’s needs and challenges as they pursue their educational goals.

The SEE specialist should actively engage all NAVIGATE team members in being supportive of clients who are also students. For example, as part of a medication evaluation, a prescriber may ask how a course is going, or if the person’s medications are helpful or causing problems in the classroom or with studying. An IRT clinician may suggest a particular coping skill for developing new social supports with classmates. A family clinician may work with family members to develop strategies for them to be supportive of their relative pursuing his or her education, such as turning off the television during preplanned study time.

Identifying Supports

Some clients have supportive people in their lives, such as family members, friends, clergy, classmates, teachers, and neighbors.
It is helpful for the SEE specialist to be as aware as possible of all of the client’s supportive relationships that may be used to provide follow-along supports. For example, the family clinician on the NAVIGATE team may work with family members to develop strategies for them to support of their relative, such as turning off the television during.

When the SEE specialist and client identify a supportive person in the client's life, the SEE specialist and the client may discuss how the person could support their involvement in school. For example, the client may want to talk to a sibling about studying for an exam, or ask someone in their home to make sure they get up on time for school, or contact a friend on-line to share school experiences.

Developing Supports

Some clients have friends or family members who have the potential to be supportive about education, but are unsure how to do that effectively. These friends or family members may have had difficult or confusing experiences with the client in the past related to school. For example, a client may have enrolled in school in the past, but was not receiving SEE services or other supports and dropped out when they developed symptoms of psychosis. With the permission of the client, the SEE specialist, with or without the Family clinician could meet with family members to discuss the ways in which the client is now much better prepared to succeed in school. They could also discuss how the relatives could support the client at school. For example, a sibling could drive the client to the library or help him or her with home assignments or play video games together to reduce stress.

The SEE specialist and the client should also explore the possibility of eliciting help from classmates, with or without assistance from the SEE specialist. For example, the client could join with (or establish on his or her own) a study group to share class notes and prepare for exams. This is a particularly useful strategy as some classmates may have friends who have taken the class and may know about prior exams given in the class. In situations where clients would like to meet up with a study group, but are unsure about how to proceed, they may benefit from role playing how to introduce themselves to potential study partners, or how to participate in a study group. It is useful for the SEE specialist to remind clients that IRT services include strategies and skills for building social supports.

Examples of Follow-Along Supports for Education

Follow-along supports for education can take many different forms and are provided by a wide variety of sources ranging from the SEE specialist to other members of the NAVIGATE team to natural supports such as family members and friends. The following tables provide some examples of follow-along education supports.

Follow Along Education Supports from SEE Specialist Outside of School (No disclosure necessary)
• Provide a ride to school and ask the person about the workload in his or her class (es).
• Meet person for lunch in the cafeteria and ask about what is going well at school.

• Provide a ride home after school and ask what a typical day of school or class is like.
• Meet on a day off from school. Ask how school is going and inquire about social contacts with other students.
• Ask clients if you can meet them where they do assignments (e.g. library or residence). Find out what help they may need with assignments.
• Ride public transportation with person to school or home from school, ask how things are going with their instructor(s).
• Meet person for a cup of coffee on their way to school. Find out how NAVIGATE team can be more helpful with school or school-related challenges.
• Meet the person at the student union building or bookstore. Ask the person about any difficulties he or she has with assignments and concentration, keeping in mind cognitive challenges and illness-related challenges.
• Do some role-plays with the client to practice skills for getting feedback from a teacher about how he or she is do in the class or how to ask for assistance with an assignment?
• Ask the person if you can read an assignment or a completed exam. Watch for cognitive or illness related challenges and ask the person about them.

Follow-Along Education Supports from NAVIGATE Team Members Outside of School (no disclosure necessary)
• Prescriber asks the person how things are going at school. Ask if the medications are helping with symptoms and concentration. Ask if the person experiences medication side effects and whether they interfere with school or homework.
• Family clinician asks what relatives can do to be supportive of client involvement in school.
• Family clinician asks family members about how they think school is going for the person.
• Family clinician asks client and relatives about having client over for a meal one night per week after or before class.
• IRT practitioner asks client about what areas at school are stressful and discusses strategies from IRT that may be useful in managing stress.
• IRT practitioner inquires about what coping skills or strategies would be useful for the person in school or in social activities.
• Director asks person how NAVIGATE services can be helpful with school and school-related activities.
• IRT practitioner inquires about what person is doing with leisure time when not at school or doing schoolwork, and whether he or she would like to develop more ways of socializing and having fun.

Follow-Along Education Supports from SEE Specialist at the School (permission for disclosure and discussion with client are necessary precursors)
• Meet with person and instructor(s) to discuss how he or she is doing in school.
• Check with an instructor to get feedback on person's strengths and challenges in school.
• Attend one of the person's classes.
• Meet with person and instructor(s) at school to ask for any needed accommodations for the classroom, home assignments or taking exams.
• Meet with person and instructor(s) or other school personnel to identify available resources for support at the school.
• Meet with person and instructor(s) to ask about ways the person can improve his or her performance or grades in the class.
• Sit in on a teacher conference or other meeting to review school performance.

Summary

Follow along supports help people to be successful in achieving their educational goals. These supports are individualized for each client in SEE services because they are based on the person's unique circumstances and needs. SEE specialists offer follow along supports to all clients who are enrolled in school. In addition, all NAVIGATE team members (prescribers, IRT clinicians, family clinicians, directors) have important roles to play in educational follow along supports, as do members of the client's natural support system in the community.

Chapter 11
Supervision

Supervision for Supported Employment and Education (SEE) is crucial to helping clients in the program to achieve their desired vocational and educational goals. Supervision also ensures adherence to the principles of SEE. In order for supervision to be as effective as possible, it needs to be conducted in a consistent fashion, reinforce the principles of SEE outlined in Chapter 2, and be based on the goals, strengths, resources and needs of each individual client combined with the strategies of SEE. This chapter describes an approach to supervision for SEE that is intended to meet these needs and requirements.

The Role of the Director as the SEE Supervisor

The NAVIGATE Director usually serves as the SEE supervisor. Supervision should be provided to the SEE specialist, for one hour on a weekly basis. The supervision time should be "protected" time for the SEE specialist; that is, time spent by the SEE specialist in supervision should not be counted against any productivity quotas that require a set number of client contact hours per week for the purposes of billing. Supervision times should be honored by the supervisor and supervisee and not seen as a time where other things can be accomplished.

The NAVIGATE Director may be the only supervisor for the SEE specialist if the agency does not have a supported employment program or is not working with an SEE specialist from another program. Alternatively, in some NAVIGATE teams, the SEE specialist may be a member of the supported employment program and participating in team supervision provided by the supervisor of that program. In all of these cases, it is still important for the NAVIGATE Director to meet regularly with the SEE specialist for supervision. In addition to verifying that the principles of SEE are being followed, these meetings serve several other purposes, including the following:

- The supported employment program may provide little or no guidance and support for clients who want to pursue their educational goals, in contrast to the SEE program.

- Most supported employment programs serve more chronically ill persons with severe mental illness, supported employment specialists and supervisors may not be attuned to the special needs of first episode psychosis clients.

- The supervision meetings, in addition to the NAVIGATE team meetings; can ensure that the client’s vocational and educational services are being fully integrated with their clinical services.

- Supervision from the NAVIGATE Director can be used to redress problems or limitations in supervision provided by a supported employment supervisor, especially if the supported employment program is not a high fidelity one.

Tracking SEE Services and Client Outcomes

In order to evaluate whether clients in SEE are getting the services they need to achieve their educational and vocational goals, the Director needs to track SEE services and outcomes of each client in the NAVIGATE program. This can be accomplished through a combination of reviewing the SEE specialist contact sheets (see Appendix), discussions during supervision with the SEE specialist, direct observations of the SEE specialist in the field, and the Director's own knowledge of the client as the family clinician and from NAVIGATE team meetings. A range of different types of information can be helpful to track in supervision, as described below:

1. Has the client have been offered the SEE program?

The NAVIGATE program assumes that all clients with a first episode of psychosis will establish some work or school goals as part of their personal recovery plan. The zero exclusion criterion for participation in SEE means that all clients are eligible for the SEE program, regardless of the severity of symptoms or cognitive challenges. Therefore, all clients in NAVIGATE should meet with the SEE specialist to discuss their goals and learn about the nature of the SEE program. This meeting should occur within a month of the client enrolling in the NAVIGATE program. For clients who are reluctant to meet with the SEE specialist, efforts should be made with the Individual Resiliency Training (IRT) or Family Education Program (FEP) clinician to arrange a joint meeting with that clinician, the client, and the SEE specialist to explain the program to explore the client's interest in participating.

2. Is the client receiving SEE services?

Not all first episode psychosis clients will choose to participate in the SEE program, but 60 to 80% of clients can be expected to participate to some extent. If fewer than this percentage of clients are participating in SEE services, then the Director should consider that the program is being underutilized, and seek ways of increasing the percentage of clients who are actively engaged in receiving SEE services.

Clients may choose to not participate in SEE for several reasons. First, they may be successfully pursuing their educational or vocational goals already, and do not feel they need additional help. Second, clients may indicate that they are making headway towards their educational or vocational goals and don't need any help, although there is little or no evidence of such progress. Third, clients may report that they have no educational or vocational goals. Fourth, clients may be so symptomatic that it is difficult to engage them in a conversation about their work or school goals.

Clients who are working or attending school successfully on their own may not require SEE services at the current time. However, it is still useful to track their involvement in work and school to determine whether such a need arises in the future. Such tracking can be done at regular NAVIGATE team meetings in which each client's involvement in school or work is reviewed.

For clients who refuse SEE services because they state they do not need them, despite an apparent lack of progress towards their goals, the SEE specialist should collaborate with the IRT or FEP clinician to explore ways the client can be motivated to reconsider using the SEE program to help achieve his or her educational or vocational goals. For example, a lack of progress in pursuing school or work goals, in combination with support from the IRT clinician and/or the FEP clinician and family members, may result in clients changing their mind and being willing to try participating in SEE.

For clients who are not interested in work or school towards the beginning of the NAVIGATE program, the SEE specialist should keep in close touch with the IRT or FEP clinicians to evaluate whether such goals emerge over the course of pursuing other recovery goals. Sometimes clients need time to process their experience of a psychotic episode, and to regain their sense of self and stability in their lives, before attending to goals related to work or school (Kingdon & Turkington, 2004). The NAVIGATE team should be aware of this as a natural part of the recovery process for some individuals, and be careful to avoid pushing the client to work on school or vocational goals before he or she feels ready to do so. Thus, for some clients, involvement in SEE may begin several months after enrolling in the NAVIGATE program. Lastly, for clients who are so symptomatic that it is difficult to talk with them about their educational or vocational goals, the SEE specialist should wait until the client's symptoms have abated, as reported during weekly NAVIGATE team meetings, before initiating a discussion with him or her about vocational or educational goals.

3. What are the goals and objectives that the SEE specialist is helping the client pursue?

Goals and objectives are established early in SEE for each client, and modified over time as individuals and their situations change. The Director and SEE specialist need to be aware of the specific work and school goals and objectives that each client is pursuing, and the anticipated timeframe for achieving each one.

4. What specific strategies are being used in SEE to help the client achieve his or her objectives, including building on personal strengths?

A wide range of strategies can be used to help clients achieve their goals and objectives. Helping clients with articulating specific goals and objectives, conducting job or school searches, and providing follow-along supports are all basic elements of SEE services. The supervision process should explore questions that will help the SEE specialist and the supervisor to best understand what is happening. Some examples of important questions include the following: What are the client's educational or employment goals and objectives? What specific strategies are being used to achieve these goals and objectives? What client strengths are being capitalized on to achieve them? What agreed-upon tasks is the client doing on his or her own? What is the SEE specialist doing? Family members? Other members of the NAVIGATE team?

5. Are illness-related impairments interfering with achieving goals and objectives? Are they being addressed by the SEE specialist and the overall NAVIGATE team?

Cognitive difficulties, symptoms, ineffective use of medications, relapses, and medication side effects can all inhibit a person from making progress towards his or her personally meaningful goals. What illness related-impairments have been identified, and what approaches have been identified for overcoming or coping with them? These strategies, whether implemented by the SEE specialist, IRT clinician, or other members of the NAVIGATE team, are all part of the service plan for SEE, and are integrated into the overall NAVIGATE treatment plan for each client.

6. Is the client making progress towards his or her personally meaningful objectives and goals?

It is critical that the SEE specialist provides the most effective services to help clients makes progress towards their goals in order to avoid getting demoralized and giving up. If the client is not making progress as expected, what changes need to be made in the SEE service plan for that client? Considerations for addressing lack of progress in finding a job or enrolling in school include the following:

- What is the client's motivation to pursue the objectives of his or her goal, as indicated by working towards them on his or her own?
- Is the client actively participating in SEE services?
- Does the client have positive social support from family members or other significant persons for achieving his or her goals?
- Does the job/school search need to be broadened to be achieved? Narrowed?
- What methods are being used for the job or school search (e.g., online applications, internet search, walking around downtown business area), and what more effective strategies or interventions should be offered?
- Is the client getting interviews but not job offers, raising questions about

interviewing skills?

- Have social networks been activated to help the client find potential jobs or schools (e.g., family members, friends, members of church, other NAVIGATE team members)?

Considerations for addressing problems with work and school performance include the following:

- Has the client experienced challenges or barriers in getting to school or work as required?
- Has the client received necessary on-the-job training/supports or teaching of requisite study skills for school?
- Are symptoms or cognitive difficulties interfering with job or school learning or performance?
- Could family members or other significant persons be helpful to the client in addressing any of the problems noted?
- Would a meeting with the SEE specialist and the teacher or employer potentially shed valuable light on the performance problems? How willing is the client to give permission for this?
- Are accommodations with the employer or teacher necessary?
- Have unresolved problems been identified by the NAVIGATE team that may be leading to work or school problems? What possible solutions have been identified?

7. Where are meetings between the SEE specialist and client taking place?

Most SEE meetings should take place in the community, not the clinic or office. Meetings in the community are the more natural setting for clients and for working on pursuing job and school interests, because potential job sites or schools can be visited and transportation issues can be raised and addressed. Community-based SEE also conveys the message that school and work are activities that take place in the community, and hence serve a “normalizing” function, and avoid unnecessary socialization of the client into the role of a “patient” whose life revolves around the mental health center. Research on supported employment has shown that employment specialists who spend more time in the community are more successful at helping their clients get and keep jobs.

Summarizing Trends in Services and Outcomes

Based on the information described above, the Director and SEE specialist can track trends in SEE services provided to clients in the NAVIGATE program. These trends can be updated on either a weekly or monthly basis, reviewed together in supervision, with goals set to improve specific services or outcomes.

Useful trends to track include:

- Number and percentage of total clients in NAVIGATE who have met with the SEE specialist.
- Number and percentage of total clients in NAVIGATE who have been engaged in the SEE program.
- Number and percentage of total clients in NAVIGATE who are currently receiving SEE services.
- Number and percentage of total clients in NAVIGATE who have set work as a goal.
- Among clients who have set work as a goal, a) number and percentage who have ever obtained work in SEE, and b) number and percentage who are currently working.
- Number and percentage of total clients in NAVIGATE who have set pursuing education as a goal.
- Among clients who have set pursuing education as a goal, a) number and percentage who have ever enrolled in school in SEE, and b) number and percentage who are currently working.
- For all clients in NAVIGATE, a) number and percentage who have ever obtained work since joining NAVIGATE, and b) number and percentage who are currently working, c) number and percentage who have ever enrolled in school since joining NAVIGATE, and d) number and percentage who are currently going to school.
- Percentage of meetings between SEE specialist and client that take place in the community vs. the clinic.

The SEE Director can review trends with the SEE specialist and together establish goals for improved outcomes (e.g., higher percentage of clients who are working or going to school) and/or more effective clinical activities (e.g., more time spent in job development or meeting clients in the community). The Director and SEE specialist can then together develop strategies for accomplishing these goals and agree on a means to track the changes in activities as well as client outcomes.

Supervision case ***example***

In her role as SEE supervisor, a NAVIGATE director reviewed the SEE contact sheets to collect outcome and service data for SEE. She observed that NAVIGATE clients were obtaining competitive jobs or enrolling in education programs at a very low. Only one out of eight clients with a vocational goal was working and only one of six clients with an educational goal was enrolled in school. She also noted that the SEE specialist was spending only two hours weekly in the community doing in-person job development with potential employers or meeting in person with staff at educational programs. The Directors/ SEE supervisor reviewed the data together and agreed that increasing the time spent in the community might lead to more employment and educational opportunities. The SEE specialist set a goal of increasing his time in the community to four hours per week and started using a log to track the number and nature of employer and educator contacts in the community. The supervisor and the specialist also developed a list of strategies for increasing time spent in the community, such as blocking out specific times each week to do job development school visits and client outreach visits. The next month, the Director and the SEE specialist reviewed the SEE contact sheets and the log of the SEE specialist, and noted that that the SEE specialist had gradually increased his community activities to 4 hours per week and that the employment and school rate had risen slightly. Together they developed strategies for further increasing the number of clients who got jobs and enrolled in school.

Strategies to Use in Supervision Sessions

It is helpful during SEE supervision sessions to have a standard format for reviewing how clients are progressing towards their work or school goals, and for addressing any obstacles they are encountering. One useful approach in the weekly supervision meetings is to begin with a brief review the status of each client on the SEE specialist's caseload. For each client, this includes summarizing the following information:

- Phase of SEE: assessment and career planning, job and/or school search, job and/or school support.
- Contacts with client over the past week.
- Progress in terms of work or school objectives and goals.
- Obstacles or problems experienced pursuing objectives and goals.

After reviewing each client's status, the Director and SEE specialist can return to focus on any problems that clients are having making progress towards their goals.

A problem solving approach can then be taken to addressing obstacles that clients are encountering in the pursuit of their goals, informed by a brief review of the answers to the questions described in the previous section of this chapter on Tracking SEE Services and Outcomes. The Director and SEE specialist, following a standard step-by-step format, can conduct problem solving collaboratively in their supervision meetings.

A valuable supervision strategy for solving problems and addressing barriers encountered by the SEE specialist is for the Director to accompany the SEE specialist in the field on a regular basis in order to observe him or her provide SEE services, and to provide field mentoring. It is optimal if the Director can provide at least monthly field mentoring, unless the specialist works in a supported employment program and is receiving such mentoring from the supervisor of that program, in which case less frequent field visits may be required. Even under such circumstances, however, some regular field mentoring is desirable, with a particular focus on SEE services focusing on client educational goals, which tend to be less routinely addressed in supported employment programs. One of the most important tasks to observe in the field is how the specialist interacts with potential employers or educators when they are helping a client to get into school or work.

Another valuable strategy is for the SEE specialist to present an individual client during supervision. An SEE Supervision Worksheet (see Appendix) has been developed to help the SEE specialist gather information and formulate questions in advance to get as much as possible out of supervision sessions. This tool is based upon the client- centered supervision model from the University of Kansas and the specifics of the SEE model (Carlson & Rapp, not dated). SEE specialists are encouraged to use this worksheet routinely to prepare for supervision to maximize the benefits for the clients with whom they work. SEE specialists can use this model of presenting clients for discussion when they have supervision with a free-standing supported employment program or when they meet with the NAVIGATE director or even at a NAVIGATE team meeting

SEE Contact Sheet and Fidelity Scale

The SEE specialist should document each contact with SEE clients using the SEE Contact Sheet (see Appendix). The purpose of the contact sheet is to help SEE specialists and supervisors keep track of the client's progress in treatment, the kinds of interventions and supports that are provided, and whether or not the client is completing mutually agreed upon tasks in between sessions.

Fidelity ratings will be based on upon the key ingredients of SEE, including zero exclusion, providing community based services, completing a comprehensive assessment (Career and Education Inventory) rapid job and school search, provision of follow along supports, and honoring the client's goals and preferences. For complete details regarding please refer to the SEE Fidelity Description in the appendix. The SEE

Fidelity Scale (see Appendix) is designed to measure the extent to which SEE specialists are providing services as intended by the model and to provide SEE specialists with ongoing feedback about SEE with their clients. The data for SEE fidelity is primarily obtained from the SEE contact sheets, the Career and Education Inventory, and from the attendance sheet at NAVIGATE meetings. The SEE supervisor or an SEE consultant may complete the fidelity scales. Feedback can be used during supervision to help SEE specialists to be as effective as possible with clients by staying faithful to the model. The feedback also can help SEE specialists assess strengths and weaknesses that can be addressed during supervision, leading to better client outcomes.

Summary

SEE supervision offers the opportunity for the growth and development of skills for the SEE specialists and their supervisors in order to provide the most effective Supported Employment and Education services possible. Supervision should be provided on a regular, consistent and structured basis during a mutually protected time. The most effective use of supervision time is to keep it focused on helping each individual person to make progress towards her or his personally meaningful recovery goals for education and employment.

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Table of Contents

Supported Employment and Education (SEE) Manual

Appendix – Forms and Handouts **Page Numbers**

Appendix – Forms and Worksheets……………………………………………………. 151-286

Ch. 1 – Learning SEE ……………………………………………………... 152-158

Ch. 3 – Supported Employment and Education Services Orientation 159-163

Ch. 3 –Career and Education Inventory …………………………......… ..164-183

Ch. 4 – Coping with Cognitive Difficulties at Work or School ……….....… 184- 215

Ch. 5 – Disability Benefits Worksheet ………………….………………… 216-217

Ch. 5 – Work Incentive Programs Worksheet ……………………………. 218- 221

Ch. 5 – Social Security Disability Benefits

Ch. 5 – Social Security Medicare

Ch. 5 – Social Security Supplemental Security Income (SSS)

Ch. 5 – Social Security Working While Disabled – How Can We Help

Ch. 5 – Social Security Your Tick To Work

Ch. 6 – Disclosure Worksheet ……………………..……………...…… 222- 229

Ch. 8 – Follow-Along Supports for Employment Checklist ………....… 230- 249

Ch. 10 – Follow-Along Supports for Education Checklist ………..….... 250- 269

Ch. 11 – SEE Supervision Worksheet …………………………...……... 270- 272

Ch. 11 – SEE Client Contact & Status Log

Ch. 11 – SEE Fidelity Description ……………………………………….... 273 - 282

Ch. 11 – SEE Fidelity Scale ……………………………………….…..… 283 -286

Learning SEE

Providing training and learning experiences for new SEE Specialists

When NAVIGATE teams are replacing, adding or training new Supported Employment and Education (SEE) Specialists on their teams, it is the responsibility of the NAVIGATE team Director to assure that the new SEE specialist receives good quality training by utilizing this training protocol.

SEE training and learning experiences are broken down into three key components. The four key components are,

- Shadowing and Field Mentoring
- Using the SEE Team Manual and the NAVIGATE Team Members' Guide
- New SEE Specialists Activities

This document contains a checklist of experiences for each of the first four weeks that a new SEE Specialist is working with NAVIGATE and learning SEE. Instructions for completing and submitting the checklist are also included.

Providing shadowing and field mentoring experiences

Whenever an existing SEE Specialist is still working on the NAVIGATE team, it is important for the NAVIGATE Director to assure that the new Specialist can shadow and follow the existing Specialist as he or she carries out SEE activities.

Shadowing an SEE Specialist during individual meetings with clients, providing job or school development in the community, and working closely with the NAVIGATE team are all critical learning opportunities. The following check list contains some of the most vital shadowing opportunities for the new SEE Specialist. The Director and the SEE Specialists should review these lists and make plans for carrying out the shadowing experiences as soon as possible once a new Specialist has been hired.

In circumstances where the experienced SEE Specialist is not available for some or all of these activities, it is important for the NAVIGATE Director to provide field mentoring and shadowing of the new SEE Specialist as she or he undertakes these important activities for the first time.

Using the SEE Manual and Team Members' Guide

To fully prepare to work with NAVIGATE clients, SEE Specialists are encouraged to read the NAVIATGE SEE Manual and become familiar with the handouts, forms, and articles provided for each chapter.

After reading each chapter and related materials in the appendix, SEESpecialists are encouraged to discuss them in supervision with their SEESupervisor and / or their NAVIGATE Director. SEE Specialists are strongly encouraged to try out relevant skills in role plays with the supervisor or coworkers or with clients with whom they already work.

For example, after reading chapter 3 (Engagement, Orientation, andAssessment), the SEE Specialist can practice using the SEE Orientation Sheet and the SEE Education and Career Inventory. After reading chapter 4 (Addressing illness-Related Challenges to work and School Functioning) SEE Specialists can practice teaching a coping strategy for cognitive difficulties.

The following table contains a possible timetable for mastering the manual in small chunks. This timetable is just one possibility. For example, some SEE Specialists may decide that they want to proceed more quickly by reading three or four chapters a week. Some Specialists may choose to familiarize themselves with chapters 1 and 2 prior to attending SEE training.

In addition to reading the materials described above for the SEE manual,new SEE practitioners are encouraged to obtain a copy of the training materials that were provided to each NAVIGATE team member. We strongly encourage new SEE practitioners to review those materials, including copies of any Power Point slides. New SEE practitioners should also have the opportunity to meet with NAVIGATE staff who attended the training to get information, ideas and strategies from them also.

New SEE Specialist Preparation Activities

The work of an SEE Specialist is based in the community, therefore, having a good working knowledge of community resources, their locations and the best ways to access them is very important to being an effective SEE Specialist. We highly recommend that all, and especially new SEE Specialists work through this preparation checklist with their supervisors as they start to provide SEE services.

Week-by-Week Learning SEE Services Training Checklists

Week 1 – SEE Training Activities To be completed by the end of first week in Navigate	
Check When Completed	SEE Activities
☐	• Observe weekly team meeting
☐	• Observe weekly supervision
☐	• Reading – **SEE Manual** Chapter 1. An Introduction to Supported Employment and Education: Work, School, and First Episode Psychosis • Reading – **SEE Manual** Chapter 2. Principles of Supported Employment and Education
☐	• Reading – **SEE Manual** Chapter 3. Engagement, Orientation, and Assessment • Reading – **SEE Manual** Chapter 4. Addressing Illness-Related Challenges to Work and School Functioning
☐	• Reading – **Team Member's Guide** Chapter 1. An Introduction to the NAVIGATE Team Members' Guide
☐	• Reading – **Team Member's Guide** Chapter 2. Background and Rationale
☐	• Reading – **Team Member's Guide** Chapter 3. Overview of NAVIGATE

Week 2 – SEE Training Activities To be completed by the end of second week in Navigate	
Check When Completed	SEE Activities
☐	• Observe new client orientation meeting
☐	• Observe participation in bi-monthly SEE consultation call
☐	• Observe completing SEE Contact Log
☐	• Observe completing agency documentation
☐	• Reading – **SEE Manual** Chapter 5. Applying for Benefits • Reading – **SEE Manual** Chapter 6. Disclosure Decisions
☐	• Reading – **SEE Manual** Chapter 7. The Job Search Process • Reading – **SEE Manual** Chapter 8. Job Follow Along Supports
☐	• Reading – **Team Member's Guide** Chapter 4. Logistics of Implementing NAVIGATE
☐	• Reading – **Team Member's Guide** Chapter 5. Core Competencies of NAVIGATE Team Members
☐	• Reading – **Team Member's Guide** Chapter 6. Collaborative Treatment Planning
☐	• Establish plan for your cell phone access
☐	• Establish plan for your internet access
☐	• Establish plan for your laptop access
☐	• Establish policies for your use of personal car/transportation
☐	• Establish policies for client transportation by SEE
☐	• Establish policies for your business card
☐	• Establish plan for employers and educators to contact you
☐	• Establish your schedule including time for working with clients in the community

Week 3 – SEE Training Activities To be completed by the end of the third week in Navigate	
Check When Completed	SEE Activities
☐	◆ Observe working on Career and Education Inventory with client and/or family members
☐	◆ Observe job search with client in the community
☐	◆ Observe school search with client in the community
☐	◆ Observe job development with employer in the community
☐	◆ Observe education development in the community
☐	◆ Reading – **SEE Manual** Chapter 9. The School Search Process ◆ Reading – **SEE Manual** Chapter 10. School Follow Along supports
☐	◆ Reading – **SEE Manual** Chapter 11. Supervision ◆ Reading – **SEE Manual** review appendixes and forms
☐	◆ Reading – **Team Member's Guide** Chapter 7. Applying for Benefits
☐	◆ Visit local municipal library ◆ Learn about available education resources ◆ Learn about available employment resources
☐	◆ Visit local university ◆ Visit local office of Student Disability Services ◆ Learn university disability accommodation policy ◆ Learn university application process ◆ Visit university library ◆ Visit university student center ◆ Obtain and review university course catalogue

Week 4 – SEE Training Activities To be completed by the end of the fourth week in Navigate	
Check When Completed	SEE Activities
☐	♦ Observe employment follow along supports with client
☐	♦ Observe education follow along supports with client
☐	♦ Prepare SEE forms and handouts for clients
☐	♦ Meet local Vocational Rehabilitation Counselors ♦ Obtain information on application process for VR
☐	♦ Visit local Career One Stop Center
☐	♦ Visit local Medicaid/State Benefits Office ♦ Obtain information on application process
☐	♦ Visit local Social Security Office ♦ Obtain information on application process
☐	♦ Visit local GED prep program ♦ Obtain information about student assistance services
☐	♦ Visit local adult education program ♦ Obtain information about student assistance
☐	♦ Visit local Community College ♦ Obtain and review community college course catalogue ♦ Learn college application process ♦ Learn college disability accommodation policy ♦ Visit college library ♦ Visit college student center ♦ Visit college office of Student Disability Services
☐	♦ Ride local public transportation systems

Notes:

NAVIGATE
Supported Employment & Education (SEE) Services Orientation

Supported Employment and Education (SEE) services are one part of the NAVIGATE program. An SEE specialist works with you to help you decide where you want to go with work and school and then works with you and the other members of the NAVIGATE team to help you get there.

What is SEE?

- SEE services are available to all clients in the NAVIGATE program to help you develop and achieve your own work or educational goals.
- SEE services are based on what you want to do regarding your own career path.
- SEE services are designed to help you with work or school, at a pace that makes sense for you, for example you may want to start school or work right away, or in a few weeks.
- Your SEE specialist works with you on areas of work and school and works closely as a team member with all other NAVIGATE services.
- Your SEE specialist is available to help you locate and receive *good, accurate work incentive planning information* (if you received benefits from programs such as SSDI, SSI, Medicaid, Medicare). You will receive information and how those benefits will be affected by employment income or education. Working with your SEE specialist, *you decide the best plan* for *your financial planning.*

How does SEE work?

- An SEE specialist will help you develop your own individual employment and/ or educational goals. You will not be asked to apply for jobs or schools that do not match what you want.

- An SEE specialist will help you to develop your own choices about how you want to accomplish your goals, including what types of assistance or help you may want to accomplish your goals.

- An SEE specialist will help you decide on what amount of work or school will work best for you. You may want to work part or full time, or return to a school, start just one class, complete a General Education Develop (GED) program, or enroll in a college.

- Your SEE specialist is available to meet with you and your family members or other people who are supportive of you, if you wish. It is sometimes very helpful to have other people be aware of your career goals and how they may be able to be helpful to you.

- Your SEE specialist will help to complete a Education and Career Inventory all about you. This gives you and your SEE specialist a chance to learn more *about your talents, your strengths, your history with education and employment, the types of jobs, schools or classes that you are interested in, and what you want to get from employment or education.*

- An SEE specialist will provide assistance to you in developing *your own individual employment or education plan* and then continue to work with you in all phases of searching for, finding and keeping employment or continuing with your education.

- SEE specialists work with a small caseload so *they can be available to you* to help as much as you need or want them to. SEE specialists have time to meet and work with you in the community, including visiting educational programs, schools or potential employers.

- SEE specialists are trained in all phases of helping people to get and keep employment. You will have the opportunity to work with *one SEE specialist* who can help you with all the phases of continuing or restarting your education and/or employment.

- If you decide to pursue education, your SEE specialist will work with you to help you *find a school or courses that matches your preferences* based on your experiences and your choices.

- If you decide to pursue education, your SEE specialist will work with you to help you explore potential sources of financial aid that will help with the costs of educational programs. Working with your SEE specialist, *you decide the best budget plan for education that fits with your financial planning.*

- Your SEE specialist *will work with you* on finding a job in a timely manner. Most people in SEE services should be talking with potential employers after about one month in the SEE program.

- Your SEE specialist *will work with you* on finding a school or educational program in a timely manner based on your pace and the school or program start dates.

- Your SEE specialist will work with you, and other members of the NAVIGATE team to *help you be successful at work or school after you start*.

- Your SEE specialist will also *help you to look for other jobs, or education programs,* if your current job or school is not a good match for you.

- Your SEE specialist is available to *will work with you, and with your employer or teachers, if you choose,* to help you be successful at work or school. The decision is up to you.

What can you expect from your SEE specialist?

- Your SEE specialist works with you on developing and making progress towards goals related to work and school. At times, you may have concerns or challenges with other things going on in your life, sometimes your SEE specialist may suggest that you get help with those challenges from other members of your Navig8 team so that your work together will stay focused on your education and your employment.

- Your SEE specialist is a regular *part of your NAVIGATE treatment team* so that your whole team is able to understand and support your career goals. Your SEE specialist meets with your other NAVIGATE team members on a regular basis to make sure that all services help you achieve your career goals.

- If you decide to pursue employment, your SEE specialist will work with you to *find a job that matches your preferences* based on your experiences and choices. You will not be required to participate in transitional placements, step-wise programs or simulated work experiences.

- Your SEE specialist is trained to work with you and your family members or other supportive people. You can expect that your SEE specialist will encourage you to consider how those people may be helpful in working with you and your SEE specialist.

- Your SEE specialist will spend most of their time out of their office and in the community. SEE specialists will be available to meet with you at your home, or your school, or at your workplace if you choose.

What will your SEE specialist expect from you?

- An SEE specialist will work with you, not for you. While you will have an SEE specialist working with you, it is important to remember that the SEE specialist will not be doing all the work.

- The job of an SEE specialist is to be helpful and supportive when you are struggling, while at the same time encouraging you to take the lead and have responsibility for getting tasks and assignments done as you work towards achieving your goals together.

- When you and your SEE specialist meet, you should expect that your SEE specialist and you will come up with assignments or mutually agreed upon tasks to be completed to help you achieve your goals.

- Your SEE specialist wants to help you decide what is important to you for school or work and to help you be successful in those areas. Your specialist will be most effective when you are able to be honest and direct with them, if you change your mind about a decision, or you are unsure about something or you have questions, it is important to you to be open in your communication with your SEE specialist.

Career and Education Inventory

This form contains questions about work, school and career that you may be discussing with your SEE specialist. This will help your specialist get to know you better. There are many ways to use this form. You and your SEE specialist can talk about the questions, and he or she can summarize the main points and write them down, you can write down some of the answers as you talk, you can both fill in the information at the same time on your own copies, or you can take the form home and discuss it in your next session.

Personal Career Goals for Education and Employment

You may already know your goals for the kind of education and career you want to have. If so, you may want to answer the questions in this section after you do the rest of the inventory, when you have had time to think more about your experiences, what you enjoyed, and concerns you might have.

- What type of career you would like to have? Another way to think about this is "What would you like to be doing in 5 years in terms of work? Or in 10 years?"

- What is interesting to you about this type of job or career? What would you enjoy about this job or career? What would be the good things about it?

- What do you need to do in order to achieve this career goal? (For example, would you need a specific degree or certificate? Would certain kind of job experiences be helpful to achieve this career goal?)

- What steps have you taken already to achieve your career goal?

- What challenges, if any, have you experienced?

- What are the next steps that you need to take in order to achieve your goal?

- What challenges, if any, do you see in taking those next steps?

- Can you think of any solutions for dealing with these challenges?

Educational Background

List schools you attended and degrees, licenses or certificates you received:
Elementary:
Jr. High School (middle school):
High School:
Vocational Schools:
Alternative High School:
GED Program:
Vocational Training Program:
Courses after High School:
Community College Courses:
College or University Courses:
College or University Programs:
Graduate School:
Other:

- While you were in school or taking courses, did you have a specialized education program such as an Individual Educational Plan (IEP)?

- Do you believe that you have a learning disability? If yes, please describe.

- Have you ever been coded with a learning disability?

- What strategies or teaching methods helped you learn in school?

- While in school or taking courses, what did you like best?

- While in school or taking courses, what did you do well?

- While in school or taking courses, what did you like the least?

- While in school or taking courses, what was most challenging or difficult for you?

- Do you feel that you may have any learning challenges were not properly identified, such as difficulties with reading, listening, concentrating, writing, taking notes, etc? If so, what?

Military Background

If you were not in the military, please skip to the section called "Your Work History."

- Were you ever in the military? If so, what branch of the service, for how long and when?

- What did you do in the military? What types of training did you receive?

- What did you like best about the military?

- What did you like least about the military?

- What was your discharge status from the military?

Work History

If you have not held any jobs, please skip to the section called "Your Mental Health."

If you have held one or more jobs, please complete the following table, starting with your most recent job. Don't worry if you can't remember all the details.

Job	Approximate start and end date

Below are some job summary sheets. Please fill in one job summary sheet each for the following: #1 your most recent job, #2 the job you enjoyed the most, #3 the job you held the longest.

Job Summary Sheet #1 – Most Recent Job

What was your most recent job?
When did you have this job?
Where were you working?
What were the duties of your job? What did you have to do?
What was your work schedule? How many hours per week did you work?
What did you do best at this job?
What did you like the most about this job?
What did you dislike most about this job?
What was most challenging or difficult for you about this job?
What were the reasons for leaving this job?

Job Summary Sheet #2 – Job You Enjoyed the Most

What was the job that you enjoyed the most?
When did you have this job?
Where were you working?
What were the duties of your job? What did you have to do?
What was your work schedule? How many hours per week did you work?
What did you do best at this job?
What did you like the most about this job?
What did you dislike most about this job?
What was most challenging or difficult for you about this job?
What were the reasons for leaving this job?

Job Summary Sheet #3 – Job You Held the Longest

What was the *longest job* ob that you have had?
When did you have this job?
Where were you working?
What were the duties of your job? What did you have to do?
What was your work schedule? How many hours per week did you work?
What did you do best at this job?
What did you like the most about this job?
What did you dislike most about this job?
What was most challenging or difficult for you about this job?
What were the reasons for leaving this job?
What caused you to stay longer at this job than at others?

Mental Health

- How would you describe your mental health right now?

- Do you believe that you have a mental illness or a psychiatric disorder? If yes, what is your understanding of it? What are the most problematic symptoms?

- If yes, what things have helped to make symptoms better? What things have made symptoms worse?

- Do you believe you have any problems with nerves or sensitivity to stress? If yes, please describe that a little.

- Have any of the problems described above interfered with your work or school performance in the past? If so, in what way?

- What have you found that makes things better with your mental health? What makes things worse?

Medications for Mental Health

- Did the doctor prescribe medications for your mental health? If so, which ones and when do you take them?

- Do you take the medications as the doctor prescribed? If no, please describe.

- Do you find the medications helpful? If yes, in what ways?

- Do you sometimes find them not helpful or problematic? In what way?

- Do you have any concerns about the medications that have been prescribed?

- Do you anticipate that taking medication might cause some difficulties at work or school?

Physical Health

- How would you describe your physical health?
- Do you have any physical health problems? Are you receiving treatment for them?
- Do you have any concerns about how your health might interfere with work or school? If so, what are your concerns?
- Do you have any physical restrictions that might be interfere with work or school?

Endurance

- How many days would you like to work each week? How many hours per day?
- How many days would you like to go to school each week? How many hours per day?

Cigarettes/Tobacco Use

- What types of tobacco products (cigarettes, cigars, chewing tobacco) do you use?

- How much and how often?

- Has tobacco use ever interfered with work or school? If yes, how? Do you have any concerns about this for future work or school?

Alcohol use

- How often do you drink alcohol?

- How much do you drink?

- Has your alcohol use ever interfered with your work or school functioning? If so, how? Do you have any concerns about this regarding future work or school?

Marijuana Use

- Have you smoked pot or marijuana in the past? If yes, how much and how often?

- Do you smoke pot or marijuana sometimes now? If yes, how much and how often?

- Has your use of pot or marijuana ever interfered with work or school? If yes, how? Do you have any concerns about this regarding future work or school?

Use of drugs other than marijuana, (such as cocaine or street drugs)

- Have you used drugs in the past? If yes, which ones? How much and how often?

- Do you use drugs sometimes now? If yes, which ones and how often?

- Has your use of drugs ever interfered with work or school? If yes, how? Do you have any concerns about this regarding future work or school?

Interpersonal Skills

- How do you get along with other people?

- Have you ever had problems getting along with people at school or work? If yes, please give an example.

- Has conflict with others affected your ability to get or keep a job or stay in school?

- Do you feel uncomfortable or anxious sometimes when you are around other people?   If yes, please describe a little.

Family and Other Supportive People

- Which people are most supportive to you?

- How often and where do you see them or talk to them?

- Which people in your support network do you want to share information with about your work or school goals and plans?

- Which people in your support network would be helpful to you in reaching your work and school goals?

Interests, hobbies and leisure activities

- What do you like to do in your free time?

- What types of hobbies or leisure activities are you good at?

- What types of hobbies or leisure activities do you enjoy the most?

Current living status

- How would you describe your living environment?

- What do you like about where you live? What do you not like about where you live?

- Are there things about your living environment that you think will be helpful in going to school or working?

- Are there things about your living environment that might get in the way?

Daily routine

- What is a typical day for you? For example, when do you get up? What do you do during the day? When do you eat meals? When do you go to bed?

- What things have you been doing in the past few days?

- What clubs or organizations do you belong to?

- What spiritual practices or religious activities do you participate in?

- Do you have any concerns about your daily routine related to school or work? If yes, what are they?

Money management

- What is your current income?

- What are your current expenses?

- How are your expenses and income managed currently?

- What outstanding debts or credit problems do you have? How might school or work help with money problems?

- What concerns do you have about money management related to school or work?

Health Insurance

- What current health insurance coverage do you have?

- Do you have any concerns about health insurance related to school or work? If yes, what are they?

Transportation

- What types of transportation do you use currently?

- Do you have your driver's license?

- What other types of transportation do you have access to for work or school?

- Do you have any concerns about transportation related to work or school? What are they?

Legal involvement

- Have you ever been arrested? What for?

- Have you ever been convicted of any legal violations or crimes?

- If so, what were you convicted of and when?

- What legal charges do you have that are outstanding or still pending?

- Do you have any legal concerns related to school or work? If yes, what are they?

Personal resources

- What people or organization might provide useful leads in looking for work or school?

Other things

- What strengths or talents do you have that have not been covered in this form?

- What other concerns or questions do you have about work and/or school that have not been covered in this form?

- What do you think other people misunderstand about you?

Coping with Cognitive Difficulties at Work or School

Everyone has personal strengths and weaknesses, including cognitive or thinking skills. Some people have more trouble paying attention or remembering things, while others may have more difficulty processing information quickly or planning ahead. Sometimes problems with cognitive skills can interfere with doing well in school or succeeding at the job. Cognitive problems can also get in the way of social relationships, having fun, and taking care of you. But don't get discouraged! If you experience cognitive difficulties there are many effective strategies that can help you cope with them.

This handout focuses on helping you cope with cognitive difficulties that interfere with achieving your school or work goals. However, the strategies described here can also help you cope effectively with cognitive problems in other areas of your life, such as having fun, relationships, and self-care. Learning strategies for coping with cognitive difficulties can help you improve your life and achieve your personal goals.

Facts about Difficulties in Cognitive (Thinking) Skills

- Difficulties in thinking skills include problems paying attention, responding rapidly to other people or demands, learning and remembering information, planning ahead, and solving problems.

- Cognitive problems are common in people who have had psychiatric symptoms, including those with an episode of psychosis, as well as people with schizophrenia, major depression, bipolar disorder, and anxiety disorders.

- Cognitive problems are usually not related to psychotic symptoms, such as hearing voices. Problems with anxiety or depression can contribute to thinking difficulties, especially attention and concentration. Medications can improve psychotic symptoms, but tend to have little effect on cognition.

- Cognitive problems are unrelated to intelligence; a person may be very bright, but still have problems paying attention or remembering information. For example, you have probably known someone who is very smart but forgetful about details, like the "absent-minded professor" in movies and books,

- Difficulties with thinking skills can interfere with a person's ability to carry out everyday tasks, including working and studying.

- Strategies designed to help people cope with or overcome their cognitive challenges can help them function more effectively in their lives, and achieve their personal goals.

Understanding Your Difficulties in Thinking Skills

In order to cope effectively with cognitive challenges, it can be useful to first pinpoint the specific thinking skills where you need the most help. Cognitive functioning can be broken down into four different areas, including:

- Attention and concentration

- Response speed

- Memory

- Planning, organization, and solving problems

Each of these areas of cognitive functioning is described below, followed by a checklist of examples of common problems in each area. After identifying the areas where you are experiencing the most cognitive difficulties, you can move onto to selecting the coping strategies you would like to try.

Attention and Concentration

Attention is the ability to focus on one task, while ignoring other things that may distract you. The longer you are able to sustain your focus on the task, the better your *concentration*. Examples of attention include:

- Listening carefully to what the teacher is saying while ignoring other conversations in the classroom

- Counting the money in the cash register while ignoring noisy customers waiting in line to pay

- Studying for a test

- Conducting an inventory in a store

Tasks that require attention and concentration are often those where new information is being learned, such as in a classroom or during the first few weeks of a new job. Also, keep in mind that "memory problems" are most often explained by not paying attention in the first place

Attention and concentration are fundamental skills for workers and students. Complete the checklist below to see which possible problems you may have experienced with attention and concentration.

Behavior Checklist for Attention and Concentration Problems

BEHAVIOR	NO	SOMEWHAT	YES
Losing track of a lecture			
Needing teachers or supervisors to repeat what they have said			
Difficulty remembering job or class schedule			
Requiring frequent prompting by job supervisors, teachers or tutors to stay on task			
Supervisor, coworker or classmate complaints about your inability to focus			
Longer time required to complete job or homework tasks			
Needing to reread homework assignments			
Needing the job supervisor to repeat instructions			
"Spacing out" or losing concentration in the middle of reading, studying, or completing a work task			
Thinking about other things when you should be focusing on school or work			
Feeling like you can't get anything done			
Other (specify): ____________ ____________ ____________ ____________			
Other (specify): ____________ ____________ ____________ ____________			

Thinking Speed

People are often confronted with situations in which they have to think and respond quickly to demands or expectations, such as answering a question, having a conversation, deciding if the bus that is coming is the one you want to get on, or if the card you are buying your books with is a debit or credit card, or following instructions. People also need to be able complete tasks without taking too long, such as taking money out of a bank machine, ordering at a fast food restaurant, or buying tokens for the subway. *Thinking speed* is how long it takes someone to respond in these situations or complete the task. Examples of activities commonly encountered at work and school that require rapid responding include:

- Answering a teacher's question
- Following instructions from a supervisor
- Taking notes during a class
- Operating a cash register
- Taking a timed test
- Working in a fast food restaurant

People who take more time to respond may experience problems at work or school, or in everyday life. Other people may get annoyed or feel frustrated if it takes someone a longer time than expected to respond to questions, follow instructions, or do something routine like buying something from a vending machine. For example, at work in a restaurant or store, taking more time to serve customers can result in long lines or losing business. In school, slow response speed can interfere with participating in classroom discussions or completing tests within the amount of time allotted, leading to poor grades even when the person knows the subject.

Complete the checklist below to see which problems you may have experienced with your thinking speed.

Behavior Checklist for Response Speed Problems

BEHAVIOR:	NO	SOMEWHAT	YES
Inability to take good notes in class			
Slow responding during conversations with others			
Speaking more slowly than other people			
Taking a long time to answer a question			
Longer time required to complete work or school tasks			
Slow to find words			
Difficulty completing tests on time			
Needing other people to talk more slowly to understand what they're saying			
Feeling left out of conversations because people don't wait for you to participate			
People seem impatient with you			
Delayed comprehension of verbally presented information or instructions			
Longer time required to make decisions, such as what classes to take, choosing a work schedule, or deciding what to have for lunch			
Holding up others due to slowed responding			
Other (specify): ____			
Other (specify): ____			

Memory

Memory is the ability to learn and retain information and skills. It can be helpful to distinguish between two types of memory: short-term memory and long-term memory. Sometimes information needs to be remembered for only a brief period of time, requiring *short-term memory*. For example:

- Remembering a customer's name during a brief conversation

- Recalling a phone number while dialing it

- Remembering the train station platform for a train you are taking

- Keeping track of a list of items in your head that your boss asked you to get from the storage room

At other times, information needs to be remembered for a long period of time, requiring *long-term memory*. For example:

- The route to work

- Learning material taught in a history class that will be required for an exam 4 months later

- Learning a foreign language

- Learning how to use a computer software program

- Learning mathematical equations for careers such as being an engineer or architect

- Where your English class is held on Tuesdays

Because job and school tasks always require some learning and retention of new information and skills, short- and long-term memory are very important for workers and students. Complete the checklist below to see which problems you may have experienced with your memory.

Behavior Checklist for Memory Problems

BEHAVIOR:	NO	SOMEWHAT	YES
Forgetting class or work schedule, such as the times and days of classes or work			
Forgetting appointments (such as meetings you set up with a teacher or tutor, a work supervisor, or your Employment and Education specialist)			
Bringing the Wednesday class materials with you to school on Thursday			
Not completing work or class assignments because of confusion or forgetting due dates			
Forgetting names of supervisors, coworkers, teachers, or classmates			
Poor performance at work or school on tasks requiring remembering information or skills			
Trouble finding things for work or school because you don't remember where you put them			
Learning directions to a destination from home			
Other (specify): ______________________________________			
Other (specify): ____			

Planning, Organization, and Solving Problems

Planning ahead, being organized, and being able to solve problems are all important, related cognitive skills for achieving work and school goals.

Planning is thinking ahead in order to accomplish your goals and get your needs met. For big goals, planning involves the process of setting goals, breaking them down into smaller steps, figuring out the best way of accomplishing each step, and making a schedule for putting your plan into action. Planning is also necessary to make sure you can get everything done within a period of time. For example, using a calendar or PDA to write down your schedule of appointments can avoid problems related to missing appointments or having a conflict of two appointments at the same time.

Organization is arranging your life, activities, and belongings so that you know where everything is and you can get everything done with a minimum of effort. Thus, organization is involved in the design of a study area that has good lighting, minimal distractions, and contains only study-related materials. Organization is also involved in preparing and arranging work-related items ahead of time, such as having clean work clothes, bus fare, and lunch.

Problem-solving involves a systematic approach to overcoming obstacles, problems or conflicts. Good planning skills help reduce unexpected problems or conflicts. However, coping with unplanned problems or obstacles is often necessary, and having a systematic plan to cope with unexpected problems will help reduce the negative impact on our schedule and mood.

Behavior Checklist for Planning, Organization, and Problem-Solving Difficulties

BEHAVIOR	NO	SOMEWHAT	YES
Difficulty with managing money (such as running out of money before the end of the month)			
Problems resolving conflicts with coworkers or classmates			
Impulsive behavior without thinking about its consequences			
Problems formulating work- or school-related goals and making plans to achieve them			
Not allowing sufficient time for a long-term project, such as a term paper at school or a reorganization at work (such as waiting until the night before its due to write a long report for school)			
Requiring frequent assistance to handle new job or school responsibilities			
Having trouble thinking creatively when established solutions don't seem to work			
Difficulty understanding abstract concepts presented in class or at work			
Feeling "lost" when a complex concept is being presented in class or at work			

Coping Strategies for Cognitive Difficulties

There are many different strategies for coping with the cognitive difficulties described above. In this section, specific strategies are described for each of the four broad areas of cognitive difficulty.

Strategies for Improving Attention and Concentration

The ability to pay attention is important for all cognitive skills, because if you have difficulty attending to critical information in the first place, it doesn't get a chance to be learned. A variety of effective strategies can help improve your attention and concentration. Usually a combination of strategies is most effective.

Schedule regular breaks from work or study

Instead of working or studying until you lose your concentration, schedule frequent brief breaks, and then resume your task again. Your concentration and attention will be stronger if you take regular short breaks instead of long breaks after longer periods of work or study. To get started:

- Choose a period of time that is comfortable for you to remain focused on your work or school
- Set an alarm and then work or study until it's time for your break
- Take a brief break, get up and stretch, rest your eyes if you've been studying or working at the computer
- When your break is over, study or work again for your planned amount of time
- Plan a fun activity during breaks or at the end of your task, such as listening to your favorite song or watching a short video
- Gradually increase the amount of time that you spend studying or working between breaks

Examples:

"Joe" wants to increase the amount of time he can study, which is only about 15 minutes at a time. He made a plan to study for 15 minutes, to then

take a 5-minute break, and to then resume studying for another 15 minutes, followed by another break. As Joe got familiar with this routine, he was able to gradually increase the amount of time he studied between breaks until he was able to study 45 minutes in a row before taking his 5-minute break.

"Jane" worked at a library shelving books, and she was given a 30-minute break for every 3 hours of work. However, Jane found it difficult to concentrate for this long a period of time. Therefore, after talking it over with her supervisor, she arranged to take a 10 minute break for every hour of work. Jane was better able to concentrate due to the more frequent rest breaks, which improved the efficiency of her work.

Remove distractions from your environment

Modifying your environment to make it as free as possible of distractions can improve your ability to concentrate on study or work tasks. There are many ways to create an environment that is conducive to getting your work done, including:

- Choose a quiet place to study or work
- Put a "do not disturb" sign on your door when you're studying
- Avoid facing out a window or towards the door to prevent distractions from outside or from people entering and leaving the room
- Clear your desk of everything not directly related to your studies or work
- Turn off unnecessary, distracting electronic equipment, such as cell phones, radio, TV
- If you are working on a computer, turn off your e-mail program to avoid distracting prompts about having receive new mail
- Avoid "multi-tasking" such as studying and listening to music or watching TV, as it reduces your attention to the task at hand
- Try to reduce any unnecessary noise in your environment; if noise is unavoidable, consider earplugs or noise canceling headphones
- Sit up front in every class to avoid distractions in the back of the room (e.g., people coming in late, talking, laughing)

Prepare a special place to work or study and a personal routine

Having a special place reserved for studying or work, and a regular routine, can help you focus your attention on your tasks at hand. For example:

- Choose a quiet, well lit room or desk to study or work at
- Try to do just work or study in your new special spot so that when you are there you'll be prompted to focus on your work or school
- Set a temperature that you are comfortable at -- not too hot or too cold
- Eat before you study or work so you are not hungry
- If you need a little snack between mealtimes, focus on fruit and nuts rather than candy or carbohydrates or soda, which take more energy for your body to digest
- Try to pick specific times to work or study each day when you are most alert
- Make it part of your routine to sit up front in every class, because it is harder to space out when the teacher is that close to you

Say steps of a task aloud

Saying steps of a task aloud can help you stay focused and reduce distractions. As you do this repeatedly, you can gradually begin to think the steps to yourself rather than saying them aloud.

Example:

When "Fred" wanted to concentrate on making photocopies, he first learned to say the steps out loud: "Put the paper on the plate, put the lid down, push the button, pick up the lid, etc."

Post the steps of the task you need to do

If you keep losing track of where you are in a multi-step task, post the steps of the task where you can easily see them and be reminded of the next step.

Coping Strategies for Attention-Concentration Worksheet

Directions: Indicate on this worksheet which coping strategies you have tried, which strategies you have found helpful, and which ones you would like to try.

Coping Strategy	**I have tried this strategy**	**This strategy is helpful**	**I would like to try this strategy or use it more often**
Schedule regular breaks from work or study			
Remove distractions from your environment			
Prepare a special place to work or study and a personal routine			
Say steps of a task aloud			
Post the steps of the task you need to do			

Other Factors that Can Interfere with Attention and Concentration

Sometimes people have difficulties with attention and concentration because of other challenges or problems. Understanding whether any of these applies to you can lead to other strategies that may help you improve your attention and concentration. The table below lists some factors that can contribute to problems in attention and concentration, and possible solutions.

Factor	Possible Solution
Feeling sleep, drowsy	• Sleep hygiene to improve sleep* • Schedule 1 or 2 brief naps during the day • Adjust medication to reduce sedating side effects • Drink coffee, tea, or other caffeinated beverages
Work or study topic not interesting or other activities seem more interesting	• Remind yourself of how school or work will help you achieve your personal or career goals • Consider why the money you earn may be important to you • Write down to remind yourself regularly about why you are in school or working at your job
Feeling anxious, nervous	• Learn relaxation techniques* • Learn anxiety management techniques** • Talk to your prescriber about medication for anxiety
Feeling depressed, sad or demoralized	• Learn coping strategies for managing and overcoming depression** • Talk to your prescriber about medication for depression

Hearing voices	• Learn strategies for coping with voices** • Talk to your prescriber about changing medication to reduce voices
Troubling thoughts (such as suspiciousness or thinking others are talking about you)	• Learn coping strategies for dealing with worrisome thoughts** • Talk to your prescriber about changing medication to reduce voices suspiciousness or thinking others are talking about you)

* = More information on these coping strategies is provided in the Education about Psychosis module of IRT (Individual Resiliency Training)
** = More information on these coping strategies is provided in the Coping with Symptoms module of IRT (Individual Resiliency Training)

Strategies for Improving Thinking Speed

The most important key to thinking and performing tasks more quickly is to have lots and lots of practice. Several strategies for improving the speed at which you think and complete tasks are described below.

Over learning

Over learning involves practicing a skill so often that you can do it automatically, without even thinking about it or only having to think a little. Any behavior that an individual does numerous times eventually become so familiar to the person that they don't have to think about each step, thereby enabling them to do it faster. This is true for even complex skills, such as:

- Driving a car
- Bowling, playing baseball, or some other sport
- Playing a musical instrument
- Writing essays
- Learning a foreign language
- Completing tasks on a computer that require a series of steps

By repeatedly practicing any task that you need to master for work or school, you will gradually become more proficient at the task, and reduce the time required to complete it.

Example:

"Aaron" had a housekeeping job in the hospital that required him to make beds. He had trouble keeping up with his supervisor's performance expectations because he was slow at making beds. To work with Aaron to address this problem, his mother helped him practice making the bed at home five times in a row each night. After a week of practice, Aaron's speed improved considerably and his supervisor complimented him on his improved job performance.

Example:

"Colleen" was very slow at getting her thoughts down on paper during tests, which was a problem when she had to complete timed essays. Colleen decided to practice writing her thoughts down for 15 minutes a day, summarizing what she knew about a particular topic area in one of her classes. With practice every day, Colleen gradually became able to write more of her thoughts down in the allotted 15 minutes. In addition, focusing on different topics related to the class she was taking helped to review material, and identify gaps in her knowledge or understanding of important areas.

Complete timed practice tests

To improve speed in taking tests, get familiar with the test format by taking as many timed practice tests as possible.

Find more efficient ways of doing the task

Sometimes the time required to complete a task can be reduced by finding a more efficient way of doing the task. This is especially true for multi-step tasks that the person is required to do over and over.

Examples:

"Lenny" had trouble organizing his thoughts on paper. He always considered himself a slow writer, which was a problem when he had to write term papers or essays. He started dictating his thoughts into a tape recorder and found that he could "talk out" a paragraph more easily than write it.

"Juanita" worked at a job in a deli making sandwiches. At first she would make each sandwich individually from start to finish. Then she discovered that she could make three sandwich orders faster by first selecting and preparing the bread for all three orders (such as toasting), then putting the customers' preferred spread on the bread, then putting the desired meat and cheese, etc.

Coping Strategies for Thinking Speed Worksheet

Directions: Indicate on this worksheet which coping strategies you have tried, which strategies you have found helpful, and which ones you would like to try.			
Coping Strategy	**I have tried this strategy**	**This strategy is helpful**	**I would like to try this strategy or use it more often**
Over learning			
Completing timed practice tests			
Finding more efficient ways of doing the task			

Strategies for Addressing Memory Difficulties

There are many different strategies for improving your memory or minimizing problems due to forgetting things. Some of these strategies involve improving your attention to make sure that you actually absorb the information you need to learn when the opportunity occurs. Some strategies can help you remember better, whereas others decrease the burden on your memory while still enabling you to accomplish your work or school tasks.

Repeat back what you heard

Many people "forget" things they are told because they did not pay attention to what the other person said in the first place. Repeating back what you just heard the other person say, either to yourself or to the person, can ensure that you have initially remembered the piece of information that you want to learn.

Example:

"James" found it easier to remember the name of someone he had just met it if he used the person's name in conversation immediately after hearing it.

SANDRA:	*Hi, my name is Sandra.*
JAMES:	*Nice to meet you, Sandra. My name is James. How do you like it here?*

Example:

"Ivana" was often requested by her boss to go down to a storage area of the basement to get particular items. She found that paraphrasing her boss's requests made it easier to remember the items she was supposed to get. In addition, sometimes her boss requested yet another item, which she was also able to add to the list:

BOSS:	*Jerome, would you go downstairs and get some manila envelopes, hanging files, and a box of writing pads?*
IVANA:	*Sure. So you'd like me to get some hanging folders, manila envelopes, and some writing pads.*
BOSS:	*That's right. Come to think of it, would you get some paper clips too?*
IVANA:	*Right, paper clips too. So that's hanging folders, manila envelopes, writing pads, and paperclips I'm getting.*
BOSS:	*That's right.*

Memory aids

You don't have to remember everything. But it is important to be able to recall certain types of information when you need it. To do this, or to remember when you need to do specific things, consider the following suggestions:

- Carry paper and a pen or pencil with you to write down things you need to remember
- Keep a pad of paper and pencil in locations where you might think of something you need to remember, such as near (or on) the refrigerator, next to the phone, in the bathroom. or next to your bed.
- Write down a list of the things you need to do each day, carry the list with you, and cross off the items as you do them
- Use a cell phone or other electronic device to set alarms to remind you to do things
- Use a hand-held recorder to record important information for yourself that you can listen to and write down later
- Make audio recordings of lectures are attending
- Get a "Smart Pen" that records lectures as you take notes and allows you to go back to parts of the lecture by pointing to a specific section of your notes
- In class, sit in the same seat on a regular basis, and remember to sit there for the final exam, because context prompts memory. For example, did you ever run into a co-worker in the grocery store and have trouble recognizing him or her? This shows the importance of context. If you saw your co-worker at the office, you would probably recognize him or her right away.

Post steps of the skill

If you have trouble remembering the next step of a multi-step task, or you sometimes get lost in the middle of doing the task, write down the steps of the task and post it somewhere prominently in your workspace.

Example:

"Darlene" had trouble remembering the sequence of steps for reporting inventory results on the computer for her company. She wrote the steps she needed to follow and taped them on the side of her computer.

Organize your work or study space

People often spend a lot of time looking for things they put down somewhere but can't remember where. Organizing your work or study space can eliminate wasting time looking for things you can't find. Some useful tips for organizing your work or study space include:

- Have a "home" or special place where you put different work or school supplies (such as stationery, tools, reference books, keys)
- Always return an item you are using to its proper place (its "home") when you are done using it
- Eliminate clutter you don't need in your work or study space to make it easier to locate the items you do need

Example:

"John" had a job in a grocery store that required him to mark items with a price gun. He would often put the price gun down somewhere, and then forget where he put it, and waste time walking up and down the aisles looking for it. He solved this problem by wearing a special belt with a hook for the price gun where he could put it when he wasn't using it. When he was done with pricing a row of items, he would return the price gun to his belt until he needed it again.

Using mnemonics or associations

This strategy involves using words or images or sounds to remember critical information. The basic idea is to create an association between what you want to remember and something that will help you remember it. Some suggestions are provided below.

- When learning a new name, make an association between a person's appearance and the name (for example, you could remember Mr. Brown's name by noting that he has brown hair)
- If you wanted to remember "seat B 22," you could create a statement for yourself such as "be 22 years old" and say it aloud and to yourself. You could also conjure up an image "22 bees flying around" and say "22 bees" aloud and to yourself. Hearing the associated phase helps you remember it.
- When you hear somebody's name, create an image of that person with his or her name on their forehead
- If you want to remember the layout of a classroom, look at it from several different angles rather than just one in order to have more associations with its location

Coping Strategies for Memory Worksheet

Directions: Indicate on this worksheet which coping strategies you have tried, which strategies you have found helpful, and which ones you would like to try.

Coping Strategy	I have tried this strategy	This strategy is helpful	I would like to try this strategy or use it more often
Repeat back what you heard			
Memory aids, such as writing things down			
Post steps of the skill			
Organize your work or study space			
Use mnemonics or associations			

Strategies for Improving Planning, Organization, and Problem Solving

A number of strategies can help improve your planning and organizational skills for work or school, and your ability to solve unexpected problems.

Use a personal scheduler

To keep track of appointments, phone numbers, addresses, etc., nothing is more useful than a personal scheduler such as an appointment book, either an electronic or paper type. By consulting your schedule in the evening, you will know what you need to prepare for the next day. Check it again in the morning before you leave the house. Put your name and phone # or e-mail address in the scheduler in case you misplace it. Make sure to write in important school deadlines, such as when you need to register for classes and when tuition is due, and important work details, such as days and times of your work schedule, vacations, and when specific projects are due.

Make a written plan each night of what you need to do the next day

Part of being well organized is knowing exactly what you need to do, and giving the most important tasks the priority they deserve. By setting aside a few minutes each night, you can create a "to do" list of what you need to do the next day. If some things are more important than others and you want to highlight that on your list, you can write a letter or number next to the item to denote its importance (e.g., A, B, C, or 1,2, 3), highlight the items with a highlighter, or write them with a different color pen.

While organizing your day the night before, do what you can to prepare at that time, such as packing a bag with your lunch, keys, money, books, and papers, so that you do not have to do this in the morning.

Learn to recognize the signs of a "problem" at work or school

Knowing as soon as possible when you are experiencing a problem with your schoolwork or job is important because you can begin addressing the problem immediately and prevent it from getting worse. In order to do this, you first need to figure out what the signs of a problem would be for your work or school activities. Then, you can use one of the strategies listed below to address the problem. Some examples of definitions of problems at work or school are provided below.

- Not completing your job on time
- Feeling overwhelmed
- Not doing tasks fast enough and holding up other people at work
- Falling far behind in your reading assignments
- Not being able to finish a test or project on time
- Avoiding a task or a person
- Poor performance on a quiz
- A customer complaining about you
- Negative feedback from a supervisor or boss

Find someone who can help you solve a problem

In many situations someone can be identified who can help you solve an unexpected problem. Figuring out who this person is, and finding out if you can get help with unexpected problems from him or her, can help you prepare for the unexpected. Examples of people who may be helpful in solving problems include:

- Your teacher or teaching assistant
- Your tutor
- Your supervisor
- A co-worker
- A family member or friend
- Your Supported Employment and Education specialist

Find solutions to common problems

Sometimes at work or school, the same type of problem may come up on more than one occasion. By identifying a particular problem that you experience, you can develop a standard solution for responding to or preventing that problem that you can use each time it occurs. Several examples of standard solutions to common problems are provided below.

- If you are interrupted while working or studying, first pause for a moment and make a mental note or write down where you were in your task before addressing the interruption

- Make friends (or at least exchange phone numbers or e-mail addresses) with a classmate in every class so you have someone to call in case you miss a class or need to be filled in on a homework assignment.

- If you're a cashier, when you are given a bill by a customer to pay for something, instead of putting the bill in the cash register, first give change to the person and then put the bill in the cash register after the customer leaves; this prevents the problem of customers claiming that they gave you a larger bill than they really did.

- You may find that a particular class is so big that the seats fill up quickly. Arrive early so you can get a seat close to the teacher.

Use the steps of problem solving

When problems come up, it can be helpful to have a standard set of steps to go through in order to solve the problem. The following 6-step method of problem solving has been found to be very helpful to many individuals and families working on solving problems. Here are the steps:

1. Identify the problem. During this step the goal is to come up with as specific a description of the problem as possible. It can be helpful to get different perspectives on the nature of the problem in order to make sure that you have identified the most important problem.

   Example of problem: It's the beginning of the college semester, but I already feel overwhelmed by my Chemistry class.

2. Brainstorm solutions. For this step, the goal is to come up with as many solutions that you can think of for solving the problem. Don't evaluate your solutions yet. Instead, let your creative energy flow, and think of as many different solutions as you can, even "wild and crazy" ones. You can work on evaluating those solutions in the next step.

Example of possible solutions:

- *I will drop the class*
- *I will give up my theatre group to make more time for studying*
- *I will ask my school counselor for advice*

3. Evaluate "pros" and "cons" of solutions. During this step, evaluate all the "pros" (advantages) and "cons" (or disadvantages) of the solutions for solving the problem. Focus on the most important pros and cons of each solution, including how practical it may be to implement the solution, and how likely it is that it will solve the problem.

   Example of pros and cons:

   - *Pro of dropping the class: I will feel less stressed which is better for my mental health*
   - *Con of dropping the class: I might not get my money back for what I paid for the class*
   - *Pro of giving up my theatre group: I will have more time for studying*
   - *Con of giving up my theatre group: I would miss the new friends I am making there*
   - *Pro of asking my counselor for advice: My counselor might be able to offer other suggestions*
   - *Con: I'm nervous about talking to her.*

4. Choose the best solution or combination of solutions. After you have evaluated all the pros and cons of the solutions, choose the best solution or combination of solutions for solving the problem. This is usually straightforward, but in some situations you may choose several solutions, and make a plan to implement one solution first, followed by another solution second if needed, and so on.

   Example of choosing a solution: I will talk to my counselor before making any changes to get her advice about keeping the class versus dropping it. .

5. Make a plan to implement the solution. During this step, the goal is to make as specific a plan to implement the solution as possible. When making your plan, consider some of the following questions:

    - Do I need any resources to implement the plan (such as money, information, skills)?
    - When will I implement the plan?
    - Who will also be involved in implementing the plan?
    - What kind of obstacles or barriers might interfere with implementing the plan?
    - What solutions can be used to overcome those obstacles?

    Example of plan:
    1. To decrease my nervousness in talking with the counselor, I will make an appointment within the next few days with my IRT clinician to practice my conversation first.
    2. I will make an appointment with my counselor within the next week and a half to talk about her advice.
    3. After talking with my counselor, I will make my decision, and break down what I need to do and how I will do it.

6. Follow up into additional problem solving as needed. Problem solving doesn't always work the first time you try it, but with repeated efforts, most people make significant headway in solving their problems. Therefore, it is always important to schedule a follow-up time to evaluate whether your problem was solved as planned, or whether additional problem solving is needed to fully resolve the problem.

    Example of follow up: I will make a follow up appointment with my counselor.

A worksheet is provided below to guide you through the process of using the six steps of problem solving.

Problem Solving Worksheet

Step 1: Discuss the problem or goal. Get everyone's opinion. Try to reach agreement on exactly what the problem or goal is. Write down the problem or goal as specifically as you can.

____

____

____

____

____

Step 2: Brainstorm 3-5 possible solutions. Do not evaluate them at this time – wait till step 3.

1.
2.
3.
4.
5.

Step 3: Briefly evaluate each solution from step 2 and list the major advantages and disadvantages.

Solution #	Pros (Advantages)	Cons (Disadvantages)
1		

2		
3		
4		
5		

Step 4: Choose the best solution(s). Consider how easy it would be to implement each solution and how likely it is to be effective.

___

___

Step 5: Plan the implementation.

When will it be implemented?	
What resources are needed and how will they be obtained?	
Who will do what to implement the solution?	
List what might go wrong in the implementation and how to overcome it.	

Practice any difficult parts of the plan.	
Who will check that all the steps of the plan have been implemented?	

Step 6: Review implementation at next session. (Date: _____________)
Revise as needed.

Coping Strategies for Improving Planning, Organization, and Problem Solving

Directions: Indicate on this worksheet which coping strategies you have tried, which strategies you have found helpful, and which ones you would like to try.			
Coping Strategy	**I have tried this strategy**	**This strategy is helpful**	**I would like to try this strategy or use it more often**
Use a personal scheduler			
Make a written plan each night of what you need to do the next day			
Learn to recognize the signs of a "problem" at work or school			
Find someone who can help you solve a problem			
Find solutions to common problems			
Use the steps of problem solving			

Summary Points of Coping with Cognitive Difficulties at Work or School

- Difficulties in thinking include problems paying attention, responding rapidly to other people or demands, learning and remembering information, planning ahead and solving problems.

- The first step is to identify which thinking problems you experience.

- The second step is to select coping strategies that you want to try.

- The third step is to try out these coping strategies with your clinician.

- The fourth step is to practice these coping strategies on your own.

- The final step is to evaluate how well the coping strategies are working. If they work well, keep doing them until they become second nature. If the strategies don’t work well at first, adapt them until they do, or try out some additional strategies.

- The most important thing to remember is that there are lots of things you can do to cope with thinking problems so that you can still achieve school and work goals that are important to you.

Disability Benefits Worksheet

This worksheet is designed to be completed by you and your SEE specialist together, including family members or other supporters with your permission.

Background

People often have many questions and concerns about applying for “disability income” or “benefits.” In the RAISE program, we are committed to helping people apply for benefits if they choose, while at the same time, we are committed to helping people live as free as possible from the impact of disability.

Deciding to apply for benefits is not an “all-or-nothing” situation. For example, a person in the NAVIGATE program may choose to apply for Social Security Disability Income (SSDI, a federal government program for income) and Medicaid (a state program for health insurance), while at the same time working on continuing his or her career by attending classes or applying for jobs.

While the process for applying for federal programs, such as Social Security Disability Income and Medicare, is generally the same in every state, the process for applying for state programs such as Medicaid varies greatly depending on the state you live in. Whatever choice you make about applying for benefits, you can be assured that your NAVIGATE team members are committed to working with you and to helping you gather information to make your own informed decisions about benefits, your career and your financial planning.

Using This Worksheet

This worksheet is designed to help you (and your family members and/or other supporters with your permission) to make your own decisions about applying for disability income or health insurance benefits. Please note that there is a separate Work Incentives Program Worksheet to help you make decisions about applying for work incentive programs. Also, if you are already receiving disability benefits, we strongly recommend that you meet with a professional work incentive counselor who can provide information related to your specific individual circumstances.

It is often useful to sort through the potential pros (advantages) and the potential cons (disadvantages) of applying for disability income or health insurance benefits. One of the most effective methods to do this is to use the Decisional Balance Matrix that is provided below. This tool will help you and whomever you choose (such as your SEE specialist, family members, support network, or other NAVIGATE team members) to sort through the advantages and disadvantages of applying for benefits, and the advantages and disadvantages of *not* applying for benefits.

While completing this matrix, it will also be helpful to identify areas where you would like more information to help with your decision.

Decisional Balance Matrix About Applying for Benefits

Pros (Advantages) of Applying for Benefits Consider possible pros, such as providing an income, providing health insurance, increasing independence, increasing ability to help with household expenses, help getting back on my feet, decreasing stress, people with expertise can help me	**Cons (Disadvantages) of Applying for Benefits** Consider possible cons, such as lack of knowledge about application process, taking a lot of my time, difficulty completing forms, inconsistent with my beliefs about what it means to receive benefits, may limit the amount of work I can do
Pros (Advantages) of *Not* Applying for Benefits Consider possible pros, such as increasing my incentive to work, saving time that I could use for something else, more consistent with my beliefs about what it means to receive benefits	**Cons (Disadvantages) of *Not* Applying for Benefits** Consider possible cons, such as continuing to have problems with money and insurance, staying under stress, not knowing other ways to get an income or insurance

Work Incentive Programs Worksheet

This worksheet is designed to be completed by you and your SEE specialist together, including input from family members or other supporters with your permission.

Background

For many people in NAVIGATE, getting a job involves making decisions regarding disability benefits they already receive or may be considering applying for, such as Social Security Disability Insurance (SSDI), Supplemental Security Income (SSI), Medicare, or Medicaid. If you are already receiving disability benefits, then you may be interested in using a work incentive program, such as “Ticket to Work” or a “Plan to Achieve Self-Support” (PASS), when starting or changing employment.

This worksheet will help you and your SEE specialist (and family members or other supporters with your permission) gather information and identify questions and concerns that you would like to have answered regarding disability benefits.

Questions

1. Has someone been legally appointed to manage your finances for you, such as a guardian or a representative payee?

Legal Guardian	**Yes**	**No**
If yes, name and contact information		
Representative Payee	**Yes**	**No**
If yes, name and contact information		
Other Financial Person	**Yes**	**No**
If yes, name and contact information		

2. What disability benefits do you currently receive? What benefits do your spouse, dependents, or household members receive? You can use the following table to record this information.

Benefits That You, Your Spouse, Your Dependents, or Household Members Receive			
Check Benefits You Already Receive	Check Benefits Family or Household Members Already Receive	Benefits Programs	Monthly Amount (if known)
		Supplemental Security Income (SSI)	
		Social Security Disability Insurance (SSDI)	
		Medicare (Any part, A, B, C or D)	
		State Medicaid (or other state-funded Health insurance)	
		State Financial Aid	
		Other State program:	
		Other State program:	
		Section 8 Housing Assistance	
		Food Stamps	
		Women Infants and Children (WIC)	
		Other Benefits:	
		Other Benefits:	

3. Sometimes people like to have another person present with them when they discuss work incentive plans and benefits. Are there any other people, including family members, significant others, peers or advocates, that you would like to be involved in your work incentive planning process? You can record this information below.

Name	Relationship/Contact Information

4. You or your family members may already have some concerns or questions about work incentive planning and benefits. Please list your questions or concerns in the following table.

Benefits Program	Questions or Concerns

5. If you are already receiving disability benefits and you want to start employment, it is very helpful to meet with a Certified Work Incentive Counselor (CWIC). You can use the following table to record contact information and appointments set.

Work Incentive Counseling Appointment	
Work Incentive Counselor Name and Contact Information	
Work Incentive Counseling Appointment Date, Time and Place	
Do you want someone to attend your work incentive counseling session with you? If so, whom? (This may include your SEE specialist or other people)	

Social Security

Benefits America!

Disability Benefits

www.socialsecurity.gov

Contact Social Security

Visit our website

Our website, ***www.socialsecurity.gov***, is a valuable resource for information about all of Social Security's programs. At our website you also can:

- Apply for certain kinds of benefits;
- Get the address of your local Social Security office;
- Request a *Social Security Statement* or a replacement Medicare card; and
- Find copies of our publications.

Call our toll-free number

In addition to using our website, you also can call us toll-free at **1-800-772-1213**. We treat all calls confidentially. We can answer specific questions from 7 a.m. to 7 p.m., Monday through Friday. We can provide information by automated phone service 24 hours a day. If you are deaf or hard of hearing, you may call our TTY number, **1-800-325-0778**.

We also want to make sure you receive accurate and courteous service. That is why we have a second Social Security representative monitor some telephone calls.

What's inside

Disability benefits 4

Who can get Social Security disability benefits? 4

How do I apply for disability benefits? 7

When should I apply and what information do I need? 7

Who decides if I am disabled? 8

What happens when my claim is approved? 12

Can my family get benefits? 13

How do other payments affect my benefits? 13

What do I need to tell Social Security? 14

When do I get Medicare? 15

Can I go back to work? 15

The Ticket to Work Program 15

Disability benefits

Disability is something most people do not like to think about. But the chances that you will become disabled probably are greater than you realize. Studies show that a 20-year-old worker has a 3-in-10 chance of becoming disabled before reaching retirement age.

This booklet provides basic information on Social Security disability benefits and is not intended to answer all questions. For specific information about your situation, you should talk with a Social Security representative.

We pay disability benefits through two programs: the Social Security disability insurance program and the Supplemental Security Income (SSI) program. This booklet is about the Social Security disability program. For information about the SSI disability program for adults, see *Supplemental Security Income (SSI)* (Publication No. 05-11000). For information about disability programs for children, refer to *Benefits For Children With Disabilities* (Publication No. 05-10026). Our publications are available online at ***www.socialsecurity.gov***.

Who can get Social Security disability benefits?

Social Security pays benefits to people who cannot work because they have a medical condition that is expected to last at least one year or result in death. Federal law requires this very strict definition of disability. While some programs give money to people with partial disability or short-term disability, Social Security does not.

Certain family members of disabled workers also can receive money from Social Security. This is explained on page 13.

How do I meet the earnings requirement for disability benefits?

In general, to get disability benefits, you must meet two different earnings tests:

1. A "recent work" test based on your age at the time you became disabled; and
2. A "duration of work" test to show that you worked long enough under Social Security.

Certain blind workers have to meet only the "duration of work" test.

The table on page 6 shows the rules for how much work you need for the "recent work" test based on your age when your disability began. The rules in this table are based on the ***calendar quarter*** in which you turned or will turn a certain age.

The calendar quarters are:

First Quarter: January 1 through March 31
Second Quarter: April 1 through June 30
Third Quarter: July 1 through September 30
Fourth Quarter: October 1 through December 31

Rules for work needed for the "recent work test"	
If you become disabled...	***Then you generally need:***
In or before the quarter you turn age 24	1.5 years of work during the three-year period ending with the quarter your disability began.
In the quarter after you turn age 24 but before the quarter you turn age 31	Work during half the time for the period beginning with the quarter after you turned 21 and ending with the quarter you became disabled. Example: If you become disabled in the quarter you turned age 27, then you would need three years of work out of the six-year period ending with the quarter you became disabled.
In the quarter you turn age 31 or later	Work during five years out of the 10-year period ending with the quarter your disability began.

The following table shows examples of how much work you need to meet the “duration of work test” if you become disabled at various selected ages. For the “duration of work” test, your work does not have to fall within a certain period of time.

NOTE: *This table does not cover all situations.*

Examples of work needed for the “duration of work” test	
If you become disabled...	***Then you generally need:***
Before age 28	1.5 years of work
Age 30	2 years
Age 34	3 years
Age 38	4 years
Age 42	5 years
Age 44	5.5 years
Age 46	6 years
Age 48	6.5 years
Age 50	7 years
Age 52	7.5 years
Age 54	8 years
Age 56	8.5 years
Age 58	9 years
Age 60	9.5 years

How do I apply for disability benefits?

There are two ways that you can apply for disability benefits. You can:

1. Apply online at ***www.socialsecurity.gov***; or
2. Call our toll-free number, **1-800-772-1213**, to make an appointment to file a disability claim at your local Social Security office or to set up an appointment for someone to take your claim over the telephone. The disability claims interview lasts about one hour. If you are deaf or hard of hearing, you may call our toll-free TTY number, **1-800-325-0778**, between 7 a.m. and 7 p.m. on business days. If you schedule an appointment, we will send you a Disability Starter Kit to help you get ready for your disability claims interview. The Disability Starter Kit also is available online at ***www.socialsecurity.gov/disability.***

When should I apply and what information do I need?

You should apply for disability benefits as soon as you become disabled. **It can take a long time to process an application for disability benefits (three to five months).** To apply for disability benefits, you will need to complete an application for Social Security Benefits and the Disability Report. You can complete the Disability Report online at ***www.socialsecurity.gov/disabilityreport***. You also can print the Disability Report, complete it and return it to your local Social Security office. We may be able to process your application faster if you help us by getting any other information we need.

The information we need includes:

- Your Social Security number;
- Your birth or baptismal certificate;
- Names, addresses and phone numbers of the doctors, caseworkers, hospitals and clinics that took care of you and dates of your visits;

- Names and dosage of all the medicine you take;
- Medical records from your doctors, therapists, hospitals, clinics and caseworkers that you already have in your possession;
- Laboratory and test results;
- A summary of where you worked and the kind of work you did; and
- A copy of your most recent W-2 Form (Wage and Tax Statement) or, if you are self-employed, your federal tax return for the past year.

In addition to the basic application for disability benefits, there are other forms you will need to fill out. One form collects information about your medical condition and how it affects your ability to work. Other forms give doctors, hospitals and other health care professionals who have treated you permission to send us information about your medical condition.

Do not delay applying for benefits if you cannot get all of this information together quickly. We will help you get it.

Who decides if I am disabled?

We will review your application to make sure you meet some basic requirements for disability benefits. We will check whether you worked enough years to qualify. Also, we will evaluate any current work activities. If you meet these requirements, we will send your application to the Disability Determination Services office in your state.

This state agency completes the disability decision for us. Doctors and disability specialists in the state agency ask your doctors for information about your condition. They will consider all the facts in your case. They will use the medical evidence from your doctors and hospitals, clinics or institutions where you have been treated and all other information. They will ask your doctors:

- What your medical condition is;
- When your medical condition began;

- How your medical condition limits your activities;
- What the medical tests have shown; and
- What treatment you have received.

They also will ask the doctors for information about your ability to do work-related activities, such as walking, sitting, lifting, carrying and remembering instructions. Your doctors are not asked to decide if you are disabled.

The state agency staff may need more medical information before they can decide if you are disabled. If more information is not available from your current medical sources, the state agency may ask you to go for a special examination. We prefer to ask your own doctor, but sometimes the exam may have to be done by someone else. Social Security will pay for the exam and for some of the related travel costs.

How we make the decision

We use a five-step process to decide if you are disabled.

1. Are you working?

If you are working and your earnings average more than a certain amount each month, we generally will not consider you disabled. The amount changes each year. For the current figure, see the annual *Update* (Publication No. 05-10003).

If you are not working, or your monthly earnings average the current amount or less, the state agency then looks at your medical condition.

2. Is your medical condition "severe"?

For the state agency to decide that you are disabled, your medical condition must significantly limit your ability to do basic work activities—such as walking, sitting and remembering—for at least one year. If your medical condition is not that severe, the state agency will not consider you disabled. If your condition is that severe, the state agency goes on to step three.

3. Is your medical condition on the List of Impairments?

The state agency has a List of Impairments that describes medical conditions that are considered so severe that they automatically mean that you are disabled as defined by law. If your condition (or combination of medical conditions) is not on this list, the state agency looks to see if your condition is as severe as a condition that is on the list. If the severity of your medical condition meets or equals that of a listed impairment, the state agency will decide that you are disabled. If it does not, the state agency goes on to step four.

4. Can you do the work you did before?

At this step, the state agency decides if your medical condition prevents you from being able to do the work you did before. If it does not, the state agency will decide that you are not disabled. If it does, the state agency goes on to step five.

5. Can you do any other type of work?

If you cannot do the work you did in the past, the state agency looks to see if you would be able to do other work. It evaluates your medical condition, your age, education, past work experience and any skills you may have that could be used to do other work.

If you cannot do other work, the state agency will decide that you are disabled. If you can do other work, the state agency will decide that you are not disabled.

Special rules for blind people

There are a number of other special rules for people who are blind. For more information, ask for *If You Are Blind Or Have Low Vision—How We Can Help* (Publication No. 05-10052).

We will tell you our decision

When the state agency reaches a decision on your case, we will send you a letter. If your application is approved, the letter will show the amount of your benefit and when your payments start. If your application is not approved, the letter will explain why and tell you how to appeal the decision if you do not agree with it.

What if I disagree?

If you disagree with a decision made on your claim, you can appeal it. The steps you can take are explained in *The Appeals Process* (Publication No. 05-10041), which is available from Social Security.

You have the right to be represented by an attorney or other qualified person of your choice when you do business with Social Security. More information is in *Your Right To Representation* (Publication No. 05-10075), which is also available from Social Security.

How we will contact you

Generally, we use the mail or call you on the phone when we want to contact you about your benefits, but sometimes a Social Security representative may come to your home. Our representative will show you identification before talking about your benefits. It is a good idea to call the Social Security office to ask if someone was sent to see you.

If you are blind or have low vision, you can choose to receive notices from us in one of five ways. Your choices are:

- A standard print notice by first-class mail; **or**
- A standard print notice by certified mail; **or**
- A standard print notice by first-class mail and a follow-up telephone call to read and explain the information in the notice; **or**
- A standard print notice and a Braille notice by first-class mail; **or**
- A standard print notice and a Microsoft Word file on a compact disc by first-class mail.

Other formats also may be available. For more information, visit our website at ***www.socialsecurity.gov/notices*** or call us toll-free at **1-877-708-1776**. If you are deaf or hard of hearing, you may call our TTY number at **1-800-325-0778**.

What happens when my claim is approved?

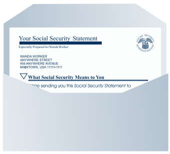
When do my benefits start?

If your application is approved, your first Social Security disability benefits will be paid for the sixth full month after the date your disability began.

Here is an example: If the state agency decides your disability began on January 15, your first disability benefit will be paid for the month of July. Social Security benefits are paid in the month following the month for which they are due, so you will receive your July benefit in August.

You also will receive *What You Need To Know When You Get Disability Benefits* (Publication No. 05-10153), which gives you important information about your benefits and tells you what changes you must report to us.

How much will my benefits be?



The amount of your monthly disability benefit is based on your average lifetime earnings. The *Social Security Statement* that you receive each year displays your lifetime earnings and provides an estimate of your disability benefit. It also includes estimates of retirement and survivors benefits that you or your family may be eligible to receive in the future. If you do not have your *Social Security Statement* and would like an estimate of your disability benefit, you can request one from our website at ***www.socialsecurity.gov*** or call our toll-free number, **1-800-772-1213**.

Can my family get benefits?

Certain members of your family may qualify for benefits based on your work. They include:

- Your spouse, if he or she is 62 or older;
- Your spouse, at any age if he or she is caring for a child of yours who is younger than age 16 or disabled;
- Your unmarried child, including an adopted child, or, in some cases, a stepchild or grandchild. The child must be younger than age 18 or younger than 19 if in elementary or secondary school full time; and
- Your unmarried child, age 18 or older, if he or she has a disability that started before age 22. (The child's disability also must meet the definition of disability for adults.)

NOTE: *In some situations, a divorced spouse may qualify for benefits based on your earnings if he or she was married to you for at least 10 years, is not currently married and is at least age 62. The money paid to a divorced spouse does not reduce your benefit or any benefits due to your current spouse or children.*

How do other payments affect my benefits?

If you are getting other government benefits, the amount of your Social Security disability benefits may be affected. For more information, you should see the following:

- *How Workers' Compensation And Other Disability Payments May Affect Your Benefits* (Publication No. 05-10018);
- *Windfall Elimination Provision* (Publication No. 05-10045); and
- *Government Pension Offset* (Publication No. 05-10007).

You can get these publications from our website, or you can contact us to request them.

If you have an outstanding warrant for your arrest

You must tell us if you have an outstanding arrest warrant for any of the following felony offenses:

- Flight to avoid prosecution or confinement;
- Escape from custody; and
- Flight-escape.

You cannot receive regular disability benefits, or any underpayments you may be due for any month in which there is an outstanding arrest warrant for any of these felony offenses.

If you are convicted of a crime

Tell Social Security right away if you are convicted of a crime. Regular disability benefits or any underpayments that may be due are not paid for the months a person is confined for a crime, but any family members who are eligible for benefits based on that person's work may continue to receive benefits.

Monthly benefits or any underpayments that may be due usually are not paid to someone who commits a crime and is confined to an institution by court order and at public expense. This applies if the person has been found:

- Not guilty by reason of insanity or similar factors (such as mental disease, mental defect or mental incompetence); or
- Incompetent to stand trial.

If you violate a condition of parole or probation

You must tell us if you are violating a condition of your probation or parole imposed under federal or state law. You cannot receive regular disability benefits or any underpayment that may be due for any month in which you violate a condition of your probation or parole.

When do I get Medicare?

You will get Medicare coverage automatically after you have received disability benefits for two years.

Can I go back to work?

After you start receiving disability benefits, you may want to try working again. There are special rules that help you keep your cash benefits and Medicare while you test your ability to work. We call these rules "work incentives" or "employment support" programs.

For more information about helping you return to work, ask for *Working While Disabled—How We Can Help* (Publication No. 05-10095). A guide to all our employment supports can be found in our Red Book, *A Summary Guide to Employment Support for Individuals with Disabilities Under the Social Security Disability Insurance and Supplemental Security Income Programs* (Publication No. 64-030). Also visit our website, ***www.socialsecurity.gov/work***.

The Ticket to Work Program

Under this program, Social Security and Supplemental Security Income disability beneficiaries can get help with training and other services they need to go to work **at no cost to them**. Most beneficiaries will receive a "ticket" that they can take to a provider of their choice who can offer the kind of services they need. To learn more about this program, ask for *Your Ticket To Work* (Publication No. 05-10061).

www.socialsecurity.gov

Social Security Administration 75 Years

Benefits America!

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SOCIAL SECURITY ADMINISTRATION 75 YEARS

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Social Security

Medicare

www.socialsecurity.gov

Contact Social Security

Visit our website

Our website, ***www.socialsecurity.gov***, is a valuable resource for information about all of Social Security's programs. At our website you also can:

- Apply for certain kinds of benefits;
- Get the address of your local Social Security office;
- Request a *Social Security Statement*, or a replacement Medicare card; and
- Find copies of our publications.

Call our toll-free number

In addition to using our website, you can call us toll-free at **1-800-772-1213**. We treat all calls confidentially. We can answer specific questions from 7 a.m. to 7 p.m., Monday through Friday. We can provide information by automated phone service 24 hours a day. If you are deaf or hard of hearing, you may call our TTY number, **1-800-325-0778**.

We also want to make sure you receive accurate and courteous service. That is why we have a second Social Security representative monitor some telephone calls.

What's inside

Medicare 4

What is Medicare? 4

Who can get Medicare? 6

Help for some low-income people 9

Signing up for Medicare 10

Options for receiving health services 13

If you have other health insurance 14

Medicare

This booklet provides basic information about what Medicare is, who is covered and some of the options you have for choosing Medicare coverage. For the latest information about Medicare, visit the website or call the toll-free number listed below.

Medicare	**Website: www.medicare.gov** **Toll-free number: 1-800-MEDICARE (1-800-633-4227)** **TTY number: 1-877-486-2048**

What is Medicare?

Medicare is our country's health insurance program for people age 65 or older. Certain people younger than age 65 can qualify for Medicare, too, including those who have disabilities and those who have permanent kidney failure or amyotrophic lateral sclerosis (Lou Gehrig's disease). The program helps with the cost of health care, but it does not cover all medical expenses or the cost of most long-term care.

Medicare is financed by a portion of the payroll taxes paid by workers and their employers. It also is financed in part by monthly premiums deducted from Social Security checks.

The Centers for Medicare & Medicaid Services is the agency in charge of the Medicare program. But you apply for Medicare at Social Security, and we can give you general information about the Medicare program.

Medicare has four parts

- Hospital insurance (Part A) that helps pay for inpatient care in a hospital or skilled nursing facility (following a hospital stay), some home health care and hospice care.
- Medical insurance (Part B) that helps pay for doctors' services and many other medical services and supplies that are not covered by hospital insurance.
- Medicare Advantage (Part C) plans are available in many areas. People with Medicare Parts A and B can choose to receive all of their health care services through one of these provider organizations under Part C.
- Prescription drug coverage (Part D) that helps pay for medications doctors prescribe for treatment.

You can get more detailed information about what Medicare covers from *Medicare & You* (Publication No. CMS-10050). To get a copy, call the Medicare toll-free number, **1-800-MEDICARE** (**1-800-633-4227**), or go to ***www.medicare.gov***. If you are deaf or hard of hearing, you may call TTY **1-877-486-2048**.

A word about Medicaid

You may think that Medicaid and Medicare are the same. Actually, they are two different programs. Medicaid is a state-run program that provides hospital and medical coverage for people with low income and little or no resources. Each state has its own rules about who is eligible and what is covered under Medicaid. Some people qualify for both Medicare and Medicaid. For more information about the Medicaid program, contact your local medical assistance agency, social services or welfare office.

Who can get Medicare?

Hospital insurance (Part A)

Most people age 65 or older who are citizens or permanent residents of the United States are eligible for free Medicare hospital insurance (Part A). You are eligible at age 65 if:

- You receive or are eligible to receive Social Security benefits; or
- You receive or are eligible to receive railroad retirement benefits; or
- You or your spouse (living or deceased, including divorced spouses) worked long enough in a government job where Medicare taxes were paid; or
- You are the dependent parent of a fully insured deceased child.

If you do not meet these requirements, you may be able to get Medicare hospital insurance by paying a monthly premium. Usually, you can sign up for this hospital insurance only during designated enrollment periods.

NOTE: *Even though the full retirement age is no longer 65, you should sign up for Medicare three months before your 65th birthday.*

Before age 65, you are eligible for free Medicare hospital insurance if:

- You have been entitled to Social Security disability benefits for 24 months; or
- You receive a disability pension from the railroad retirement board and meet certain conditions; or
- If you receive Social Security disability benefits because you have Lou Gehrig's disease (amyotrophic lateral sclerosis); or
- You worked long enough in a government job where Medicare taxes were paid and you meet the requirements of the Social Security disability program; or

- You are the child or widow(er) age 50 or older, including a divorced widow(er), of someone who has worked long enough in a government job where Medicare taxes were paid and you meet the requirements of the Social Security disability program.
- You have permanent kidney failure and you receive maintenance dialysis or a kidney transplant and:
  - —You are eligible for or receive monthly benefits under Social Security or the railroad retirement system; or
  - —You have worked long enough in a Medicare-covered government job; or
  - —You are the child or spouse (including a divorced spouse) of a worker (living or deceased) who has worked long enough under Social Security or in a Medicare-covered government job.

Medical insurance (Part B)

Anyone who is eligible for free Medicare hospital insurance (Part A) can enroll in Medicare medical insurance (Part B) by paying a monthly premium. Some beneficiaries with higher incomes will pay a higher monthly Part B premium. For more information, ask for *Medicare Part B Premiums: New Rules For Beneficiaries With Higher Incomes* (Publication No. 05-10161) or visit ***www.socialsecurity.gov/mediinfo.htm***.

If you are not eligible for free hospital insurance, you can buy medical insurance, without having to buy hospital insurance, if you are age 65 or older and you are—

- A U.S. citizen; or
- A lawfully admitted noncitizen who has lived in the United States for at least five years.

Medicare Advantage plans (Part C)

If you have Medicare Parts A and B, you can join a Medicare Advantage plan. With one of these plans, you do not need a Medigap policy, because Medicare Advantage plans generally cover many of the same benefits that a Medigap policy would cover, such as extra days in the hospital after you have used the number of days that Medicare covers.

Medicare Advantage plans include:

- Medicare managed care plans;
- Medicare preferred provider organization (PPO) plans;
- Medicare private fee-for-service plans; and
- Medicare specialty plans.

If you decide to join a Medicare Advantage plan, you use the health card that you get from your Medicare Advantage plan provider for your health care. Also, you might have to pay a monthly premium for your Medicare Advantage plan because of the extra benefits it offers.

People who become newly entitled to Medicare should enroll during their initial enrollment period (as explained under *Signing up for Medicare* on pages 10 – 11) or during the annual coordinated election period from November 15 – December 31 each year. There also will be special enrollment periods for some situations.

Medicare prescription drug plans (Part D)

Anyone who has Medicare hospital insurance (Part A), medical insurance (Part B) or a Medicare Advantage plan (Part C) is eligible for prescription drug coverage (Part D). Joining a Medicare prescription drug plan is voluntary, and you pay an additional monthly premium for the coverage. You can wait to enroll in a Medicare Part D plan if you have other prescription drug coverage but, if you don't have prescription coverage that is, on average, at least as good as Medicare prescription drug coverage, you will pay a penalty if you wait to join later. You will have to pay this penalty for as long as you have Medicare prescription drug coverage.

People who become newly entitled to Medicare should enroll during their initial enrollment period (as explained under *Signing up for Medicare* on pages 10 – 11). After the initial enrollment periods, the annual coordinated election period to enroll or make provider changes will be November 15 – December 31 each year. There also will be special enrollment periods for some situations.

Help for some low-income people

If you cannot afford to pay your Medicare premiums and other medical costs, you may be able to get help from your state. States offer programs for people who are entitled to Medicare and have low income. The programs may pay some or all of Medicare's premiums and also may pay Medicare deductibles and coinsurance. To qualify, you must have Part A (hospital insurance), a limited income, and, in most states, your resources, such as bank accounts, stocks and bonds, must not be more than $4,000 for a single person or $6,000 for a couple.

If you are not sure if you have Part A, look on your red, white and blue Medicare card. It will show "Hospital (Part A)" on the lower left corner of the card. If you are still not sure, you can call Social Security toll-free.

You can go online to get more information about these programs from the Centers for Medicare & Medicaid Services (CMS) website. Visit ***www.medicare.gov*** and request *Get help with your Medicare costs* (Publication No. CMS-10126).

Only your state can decide if you qualify for help under these programs. To find out, contact your state or local medical assistance (Medicaid) agency, social services or welfare office.

You also may be able to get extra help paying for the annual deductibles, monthly premiums and prescription co-payments related to the Medicare prescription drug program (Part D). You may qualify for extra help if you have limited income (tied to the federal poverty level) and limited resources. These income and resource limits change each year, and you can contact us for the current numbers.

If you have both Medicaid with prescription drug coverage and Medicare, Medicare and Supplemental Security Income, or if your state pays for your Medicare premiums, you automatically will get this extra help and you don't need to apply.

For more information about getting help with your prescription drug costs, call Social Security's toll-free number or visit our website. You also can apply online at Social Security's website.

Signing up for Medicare

When should I apply?

If you are already getting Social Security retirement or disability benefits or railroad retirement checks, you will be contacted a few months before you become eligible for Medicare and given the information you need. If you live in one of the 50 states or Washington, D.C., you will be enrolled in Medicare Parts A and B automatically. However, because you must pay a premium for Part B coverage, you have the option of turning it down.

NOTE: *Residents of Puerto Rico or foreign countries will not receive Part B automatically. They must elect this benefit.*

If you are not already getting retirement benefits, you should contact us about three months before your 65th birthday to sign up for Medicare. You can sign up for Medicare even if you do not plan to retire at age 65.

Once you are enrolled in Medicare, you will receive a red, white and blue Medicare card showing whether you have Part A, Part B or both. Keep your card in a safe place so you will have it when you need it. If your card is ever lost or stolen, you can apply for a replacement card on the Internet at ***www.socialsecurity.gov*** or call Social Security's toll-free number. You will also receive a *Medicare & You* (Publication No. CMS-10050) handbook that describes your Medicare benefits and Medicare plan choices.

Special enrollment situations

You also should contact Social Security about applying for Medicare if:

- You are a disabled widow or widower between age 50 and age 65, but have not applied for disability benefits because you are already getting another kind of Social Security benefit;
- You are a government employee and became disabled before age 65;
- You, your spouse or your dependent child has permanent kidney failure;
- You had Medicare medical insurance in the past but dropped the coverage; or
- You turned down Medicare medical insurance when you became entitled to hospital insurance (Part A).

Initial enrollment period for Part B

When you first become eligible for hospital insurance (Part A), you have a seven-month period (your initial enrollment period) in which to sign up for medical insurance (Part B). A delay on your part will cause a delay in coverage and result in higher premiums. If you are eligible at age 65, your initial enrollment period begins three months before your 65th birthday, includes the month you turn age 65 and ends three months after that birthday. If you are eligible for Medicare based on disability or permanent kidney failure, your initial enrollment period depends on the date your disability or treatment began.

When does my enrollment in Part B become effective?

If you accept the automatic enrollment in Medicare Part B, or if you enroll in Medicare Part B during the first three months of your initial enrollment period, your medical insurance protection will start with the month you are first eligible. If you enroll during the last four months, your protection will start from one to three months after you enroll.

The following chart shows when your Medicare Part B becomes effective:

If you enroll in this month of your initial enrollment period:	Then your Part B Medicare coverage starts:
1	The month you become eligible for Medicare
2	The month you become eligible for Medicare
3	The month you become eligible for Medicare
4	One month after enrollment
5	Two months after enrollment
6	Three months after enrollment
7	Three months after enrollment

General enrollment period for Part B

If you do not enroll in Medicare Part B during your initial enrollment period, you have another chance each year to sign up during a "general enrollment period" from January 1 through March 31. Your coverage begins the following July. **However, your monthly premium increases 10 percent for each 12-month period you were eligible for, but did not enroll in, Medicare Part B.**

Special enrollment period for people covered under an employer group health plan

If you are 65 or older and are covered under a group health plan, either from your own or your spouse's **current employment**, you have a "special enrollment period" in which to sign up for Medicare Part B. This means that you may delay enrolling in Medicare Part B without having to wait for a general enrollment period and paying the 10 percent premium surcharge for late enrollment. The rules allow you to:

- Enroll in Medicare Part B any time while you are covered under the group health plan based on current employment; or
- Enroll in Medicare Part B during the eight-month period that begins following the last month your group health coverage ends, or following the last month employment ends—whichever comes first.

Special enrollment period rules do not apply if employment or employer-provided group health plan coverage ends during your initial enrollment period.

If you do not enroll by the end of the eight-month period, you will have to wait until the next general enrollment period, which begins January 1 of the next year. You also may have to pay a higher premium, as described previously.

People who receive Social Security disability benefits and are covered under a group health plan from either their own or a family member's current employment also have a special enrollment period and premium rights that are similar to those for workers age 65 or older.

Options for receiving health services

Medicare beneficiaries may have choices for receiving health care services.

You can get more information about your health care options from the following publications:

- *Medicare & You* (Publication No. CMS-10050)—This general guide is mailed to people after they enroll in Medicare and an updated version is mailed each year after that.
- *Choosing a Medigap Policy*: A *Guide to Health Insurance for People with Medicare* (Publication No.

CMS-02110)—This guide describes how other health insurance plans supplement Medicare and offers some shopping hints for people looking at those plans.

To get a copy of these publications, call the Medicare toll-free number, **1-800-MEDICARE** (**1-800-633-4227**), or go to ***www.medicare.gov***. If you are deaf or hard of hearing, you may call TTY **1-877-486-2048**.

If you have other health insurance

Medicare hospital insurance is free for almost everyone, but you do pay a monthly premium for medical insurance. If you already have other health insurance when you become eligible for Medicare, is it worth the monthly premium cost to sign up for Medicare medical insurance?

The answer varies with each person and the kind of other health insurance you may have. Although we cannot give you "yes" or "no" answers, we can offer a few tips that may be helpful when you make your decision.

If you have a private insurance plan

Get in touch with your insurance agent to see how your private plan fits with Medicare medical insurance. This is especially important if you have family members who are covered under the same policy. And remember, just as Medicare does not cover all health services, most private plans do not either. In planning your health insurance coverage, keep in mind that most nursing home care is not covered by Medicare or private health insurance policies. One important word of caution: for your own protection, **do not cancel any health insurance you now have until your Medicare coverage actually begins.**

If you have insurance from an employer-provided group health plan

Group health plans of employers with 20 or more employees are required by law to offer workers and their spouses who are age 65 (or older) the same health benefits that are provided to younger employees.

If you are currently covered under an employer-provided group health plan, you should talk to your personnel office before you sign up for Medicare medical insurance.

If you have health care protection from other plans

If you have coverage under a program from the Department of Defense, your health benefits may change or end when you become eligible for Medicare. You should contact the Department of Defense or a military health benefits advisor for information before you decide whether to enroll in Medicare medical insurance.

If you have health care protection from the Indian Health Service, Department of Veterans Affairs or a state medical assistance program, contact the people in those offices to help you decide whether it is to your advantage to have Medicare medical insurance.

For more information on how other health insurance plans work with Medicare call the Medicare toll-free number **1-800-MEDICARE** (**1-800-633-4227**) and ask for *Medicare and Other Health Benefits: Your Guide to Who Pays First* (Publication No. CMS-02179) or visit ***www.medicare.gov***. If you are deaf or hard of hearing, you may call TTY **1-877-486-2048**.

www.socialsecurity.gov

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Social Security

Supplemental Security Income (SSI)

www.socialsecurity.gov

Contact Social Security

Visit our website

Our website, ***www.socialsecurity.gov***, is a valuable resource for information about all of Social Security's programs. At our website you also can:

- Apply for certain kind of benefits;
- Get the address of your local Social Security office;
- Request a *Social Security Statement*, a replacement Medicare card; and
- Find copies of our publications.

Call our 1-800 number

In addition to using our website, you also can call us toll-free at **1-800-772-1213**. We can answer specific questions from 7 a.m. to 7 p.m., Monday through Friday. We can provide information by automated phone service 24 hours a day. If you are deaf or hard of hearing, you may call our TTY number, **1-800-325-0778**.

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What's Inside

Supplemental Security Income (SSI) 4

What is SSI? 4

Rules for getting SSI 5

How to apply for SSI 8

You may be able to get other help 9

You may be able to get Social Security 11

Supplemental Security Income (SSI)

This booklet explains what Supplemental Security Income (SSI) is, who can get it and how to apply. It provides basic information and is not intended to answer all questions. For specific information about your situation, you should talk with a Social Security representative.

The SSI program makes payments to people with low income who are age 65 or older or are blind or have a disability.

The Social Security Administration manages the SSI program. Even though Social Security manages the program, SSI is not paid for by Social Security taxes. SSI is paid for by U.S. Treasury general funds, not the Social Security trust funds.

What is SSI?

SSI makes monthly payments to people who have low income and few resources and are:

- Age 65 or older;
- Blind; or
- Disabled.

If you are applying for SSI, you also should ask for *What You Need To Know When You Get Supplemental Security Income (SSI)* (Publication No. 05-11011).

Disabled or blind children also can receive SSI. You can get more information in *Benefits For Children With Disabilities* (Publication No. 05-10026).

The basic SSI amount is the same nationwide. However, many states add money to the basic benefit. You can call us to find out the amounts for your state.

Your income and resources

Whether you can get SSI depends on your income and resources (the things you own).

Income

Income is money you receive such as wages, Social Security benefits and pensions. Income also includes such things as food and shelter. The amount of income you can receive each month and still get SSI depends partly on where you live. You can call us to find out the income limits in your state.

Social Security **does not count** all of your income when we decide whether you qualify for SSI. **For example**, we do not count:

- The first $20 a month of most income you receive;
- The first $65 a month you earn from working and half the amount over $65;
- Food stamps;
- Shelter you get from private nonprofit organizations; and
- Most home energy assistance.

If you are married, we also include part of your spouse's income and resources when deciding whether you qualify for SSI. If you are younger than age 18, we include part of your parents' income and resources. And, if you are a sponsored noncitizen, we may include your sponsor's income and resources.

If you are a student, some of the wages or scholarships you receive **may not** count.

If you are disabled but work, Social Security **does not** count wages you use to pay for items or services that help you to work. For example, if you need a wheelchair, the wages you use to pay for the wheelchair do not count as income when we decide whether you qualify for SSI.

Also, Social Security **does not** count any wages a blind person uses for work expenses. For example, if a blind person uses wages to pay for transportation to and from work, the wages used to pay the transportation cost are not counted as income.

If you are disabled or blind, some of the income you use (or save) for training or to buy things you need to work **may not** count.

Resources (things you own)

Resources that we count in deciding whether you qualify for SSI include real estate, bank accounts, cash, stocks and bonds.

You may be able to get SSI if your resources are worth no more than $2,000. A couple may be able to get SSI if they have resources worth no more than $3,000. If you own property that you are trying to sell, you may be able to get SSI while trying to sell it.

Social Security does not count everything you own in deciding whether you have too many resources to qualify for SSI. For example, we do not count:

- The home you live in and the land it is on;
- Life insurance policies with a face value of $1,500 or less;
- Your car (usually);
- Burial plots for you and members of your immediate family; and
- Up to $1,500 in burial funds for you and up to $1,500 in burial funds for your spouse.

Other rules you must meet

To get SSI, you must live in the U.S. or the Northern Mariana Islands and be a U.S. citizen or national. In some cases, noncitizen residents can qualify for SSI. For more information, ask for *Supplemental Security Income (SSI) For Noncitizens* (Publication No. 05-11051).

If you are eligible for Social Security or other benefits, you should apply for them. You can get SSI and other benefits if you are eligible for both.

If you live in certain types of institutions, you may get SSI.

If you live in a city or county rest home, halfway house or other public institution, you usually cannot get SSI. But there are some exceptions.

If you live in a publicly operated community residence that serves no more than 16 people, you may get SSI.

If you live in a public institution mainly to attend approved educational or job training to help you get a job, you may get SSI.

If you live in a public emergency shelter for the homeless, you may get SSI.

If you live in a public or private institution and Medicaid is paying more than half the cost of your care, you may get a small SSI benefit.

How to apply for SSI

If you are applying for SSI, you can complete a large part of your application by visiting our website at ***www.socialsecurity.gov***. You also can call us toll-free at **1-800-772-1213** to ask for an appointment with a Social Security representative.

Parents or guardians usually can apply for blind or disabled children under age 18. In some cases, other third parties can apply for children.

You should bring certain items when you apply. Even if you do not have all of the things listed below, apply anyway. The people in the Social Security office can help you get whatever is needed. Please bring:

- Your Social Security card or a record of your Social Security number;
- Your birth certificate or other proof of your age;
- Information about the home where you live, such as your mortgage or your lease and landlord's name;
- Payroll slips, bank books, insurance policies, burial fund records and other information about your income and the things you own;
- The names, addresses and telephone numbers of doctors, hospitals and clinics that you have been to, if you are applying for SSI because you are disabled or blind;
- Proof of U.S. citizenship or eligible noncitizen status.

You also should bring your checkbook or other papers that show your bank, credit union or savings and loan account number so we can have your benefits deposited directly into your account. Direct deposit protects benefits from loss, theft and mail delay. The money is always on time and ready to use without making a trip to the bank.

A note for people who are blind or disabled

If you work, there are special rules to help you. You may be able to keep getting SSI payments while you work. As you earn more money, your SSI payments may be reduced or stopped, but you may be able to keep your Medicaid coverage.

You also may be able to set aside some money for a work goal or to go to school. In this case, the money you set aside will not reduce the amount of your SSI.

Blind or disabled people who apply for SSI may get free special services to help them work. These services may include counseling, job training and help in finding work.

You can get more information in *Working While Disabled—How We Can Help* (Publication No. 05-10095).

Right to appeal

If you disagree with a decision made on your claim, you can appeal it. The steps you can take are explained in *Your Right To Question A Decision Made On Your Supplemental Security Income (SSI) Claim* (Publication No. 05-11008).

You have the right to be represented by an attorney or other qualified person of your choice. More information is in *Your Right To Representation* (Publication No. 05-10075).

You may be able to get other help

If you get SSI, you also may be able to get help from your state or county. For example, you may be able to get Medicaid, food stamps or other social services. Call your local social services department or public welfare office for information about the services available in your community.

Food stamps

If everyone in your home signs up for SSI or gets SSI, Social Security will help you fill out the food stamp application.

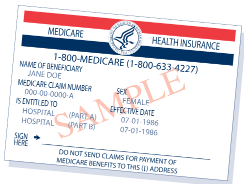
If you do not live in a home where everyone signs up for SSI or gets SSI, you must go to your local food stamp office to get food stamps. You can get more information about food stamps by visiting our website or calling us to get *Food Stamps And Other Nutrition Programs* (Publication No. 05-10100).

Medicaid

When you get SSI, you also may get Medicaid which helps pay doctor and hospital bills. Your local welfare or medical assistance office can give you information about Medicaid.

Help paying for Medicare

If you get Medicare and have low income and few resources, your state may pay your Medicare premiums and, in some cases, other Medicare expenses such as deductibles and coinsurance. Only your state can decide if you qualify. To find out if you do, contact your state or local welfare office or Medicaid agency. You can get more information about these programs from the Centers for Medicare & Medicaid Services (CMS) by calling the Medicare toll-free number, **1-800-MEDICARE (1-800-633-4227)**. If you are deaf or hard of hearing, you may call **TTY 1-877-486-2048**.



You also may be able to get extra help paying for the annual deductibles, monthly premiums and prescription co-payments related to the Medicare prescription drug program (Part D). You may qualify for extra help if you have limited income (tied to the federal poverty level) and limited resources. These income and resource limits change each year and are not the same as the SSI income and resource limits. You can contact Social Security for the current numbers.

If you have both Medicaid with prescription drug coverage and Medicare, Medicare and SSI, or if your state pays for your Medicare premiums, you automatically will get this extra help and you don't need to apply.

You may be able to get Social Security

If you have worked and paid into Social Security long enough, you also may be eligible for Social Security benefits while you are receiving SSI. Retirement benefits can be paid to people age 62 or older and their families. Disability benefits go to people with disabilities and their families. Survivors benefits are paid to the families of workers who have died. If you think you may qualify for Social Security benefits, call us to make an appointment to talk with a Social Security representative.

www.socialsecurity.gov

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SOCIAL SECURITY ADMINISTRATION 75 YEARS

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Social Security

Working While Disabled—How We Can Help

2010

www.socialsecurity.gov

Contacting Social Security

Visit our website

Our website, ***www.socialsecurity.gov***, is a valuable resource for information about all of Social Security's programs. At our website you also can:

- Apply for certain kinds of benefits;
- Get the address of your local Social Security office;
- Request important documents, such as a *Social Security Statement*, a replacement Medicare card or a letter to confirm your benefit amount; and
- Find copies of our publications.

For additional information on work incentives and other topics in this booklet, go to our special worksite pages at ***www.socialsecurity.gov/work***.

Call our toll-free number

In addition to using our website, you can call us toll-free at **1-800-772-1213**. We treat all calls confidentially. We can answer specific questions from 7 a.m. to 7 p.m., Monday through Friday. We can provide information by automated phone service 24 hours a day. (You can use our automated response system to tell us a new address or request a replacement Medicare card.) If you are deaf or hard of hearing, you can call our TTY number, **1-800-325-0778**.

We also want to make sure you receive accurate and courteous service. That is why we have a second Social Security representative monitor some telephone calls.

What's inside

Getting disability benefits? We can help you get to work . . . 4

Work Incentives Planning and Assistance program 5

Social Security disability rules

Social Security work incentives at a glance 6

How your earnings affect your Social Security benefits 8

If you lose your job 9

Special rules for workers who are blind 9

Supplemental Security Income (SSI) program rules

SSI work incentives at a glance 10

How your earnings affect your SSI payments 12

How long your Medicaid will continue 13

Getting disability benefits? We can help you get to work

If you are getting disability benefits, we have good news for you. Social Security's work incentives and Ticket to Work programs can help you if you are interested in working.

Special rules make it possible for people receiving Social Security disability benefits or Supplemental Security Income (SSI) to work and still receive monthly payments.

And, if you cannot continue working because of your medical condition, your benefits can start again—you may not have to file a new application.

Work incentives include:

- Continued cash benefits for a time while you work;
- Continued Medicare or Medicaid while you work; and
- Help with education, training and rehabilitation to start a new line of work.

The rules are different under Social Security and SSI. We describe the rules under each program in different sections of this booklet. Social Security incentives begin on page 6 and SSI incentives start on page 10.

But, whether you are receiving Social Security or SSI, it is important to let us know promptly when you start or stop working, or if any other change occurs that could affect your benefits.

The Ticket to Work program may also help you if you would like to work. You can receive vocational rehabilitation, training, job referrals and other employment support services free of charge. You will not undergo medical reviews while you are using the ticket and making timely progress pursuing your return to work plan.

You can get more information on the Ticket to Work program by calling **1-866-968-7842** toll-free (TTY **1-866-833-2967**). Or you can call our toll-free number and ask for *Your Ticket To Work* (Publication No. 05-10061).

You also can visit the Ticket to Work website at ***www.socialsecurity.gov/work*** for more information.

Work Incentives Planning and Assistance program

Social Security has a Work Incentives Planning and Assistance program (WIPA) that will help answer questions about Social Security's work incentives and help you make a decision about working.

Community-based organizations provide information and work incentives planning and assistance to people who are receiving Social

Security or SSI disability benefits and who are working or considering work. Their community work incentive coordinators can help you understand how work affects your payments and explain what other federal, state and local supports there are for people with disabilities who want to work.

To locate the WIPA project nearest you, please call **1-866-968-7842** (TTY **1-866-833-2967**). You also can find a list with contact information on our website at ***https://secure.ssa.gov/apps10/oesp/providers.nsf/bystate***.

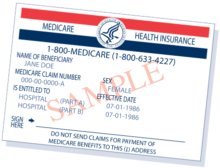
Social Security work incentives at a glance

(The SSI program rules begin on page 10.)

Trial work period—The trial work period allows you to test your ability to work for at least nine months. During your trial work period, you will receive your full Social Security benefits regardless of how much you are earning as long as you report your work activity and you continue to have a disabling impairment. In 2010, a trial work month is any month in which your total earnings are $720 or more, or, if you are self-employed, you earn more than $720 (after expenses) or spend more than 80 hours in your own business. The trial work period continues until you have worked nine months within a 60-month period.

Extended period of eligibility— After your trial work period, you have 36 months during which you can work and still receive benefits for any month your earnings are not "substantial." In 2010, earnings of $1,000 or more ($1,640 if you are blind) are considered substantial. No new application or disability decision is needed for you to receive a Social Security disability benefit during this period.

Expedited reinstatement—After your benefits stop because your earnings are substantial, you have five years during which you may ask us to start your benefits immediately if you find yourself unable to continue working because of your condition. You will not have to file a new disability application and you will not have to wait for your benefits to start while your medical condition is being reviewed to make sure you are still disabled.



Continuation of Medicare— If your Social Security disability benefits stop because of your earnings, but you are still disabled, your free Medicare Part A coverage will continue for at least 93 months after the nine-month trial work period. After that, you can buy

Medicare Part A coverage by paying a monthly premium. If you have Medicare Part B coverage, you must continue to pay the premium. If you want to end your Part B coverage, you must request it in writing.

Work expenses related to your disability—If you work, you may have to pay for certain items and services that people without disabilities do not pay for. For example, because of your medical condition, you may need to take a taxi to work instead of public transportation. We may be able to deduct the cost of the taxi from your monthly earnings before we determine if you are still eligible for benefits.

How your earnings affect your Social Security benefits

During the trial work period, there are no limits on your earnings. During the 36-month extended period of eligibility, you usually can make no more than $1,000 a month or your benefits will stop. But, the work expenses you have as a result of your disability are deducted when we count your earnings to see if they can help you keep more of your benefits. If you have extra work expenses, your earnings could be substantially higher than $1,000 before they affect your benefits. This substantial earnings amount usually increases each year.

We deduct work expenses related to your disability from your earnings before we determine if you are still eligible for benefits. These expenses may include the cost of any item or service you need to work, even if the item or service also is useful to you in your daily living. Examples include prescription drugs, transportation to and from work (under certain conditions), a personal attendant or job coach, a wheelchair or any specialized work equipment.

If you lose your job

If you lose your job during a trial work period, your benefits are not affected. If you lose your job during the 36-month extended period of eligibility, call us and your benefits will be reinstated as long as you are still disabled.

Special rules for workers who are blind

If you are blind and you work while receiving your Social Security benefits, there are special rules.

- You can earn up to $1,640 a month in 2010 before your earnings may affect your benefits.
- If you earn too much to receive disability benefits, you are still eligible for a disability "freeze." This means that we will not count those years in which you had little or no earnings

because of your disability in figuring your future benefits.

This can help you because your benefits are based on your highest earnings over your work life. For more information on special rules for blind persons, ask for *If You Are Blind Or Have Low Vision—How We Can Help* (Publication No. 05-10052).

SSI work incentives at a glance

(The Social Security disability rules begin on page 6.)

Continuation of SSI—SSI payments are made to people age 65, blind or disabled and have little income or resources. If you are disabled and work despite your disability, you may continue to receive payments until your earnings, added with any other income, exceed the SSI income limits. This limit is different in every state. Even if your SSI payments stop, your Medicaid coverage usually will continue if your earnings are less than your state level.

Expedited reinstatement—If we stopped your payments because of your earnings and you become unable to work again because of your medical condition, you may ask us to start your payments again. You will not have to file a new disability application if you make this request within five years after the month your benefits stopped.

Work expenses related to your disability—If you work, you may have to pay for certain items and services that people without disabilities do not pay for. For example, because of your medical condition, you may need to take a taxi to work, instead of public transportation. We may be able to deduct the cost of the taxi from your monthly earnings before we determine if you are still eligible for benefits.

Plan to achieve self-support—If we approve your plan for a work goal that will reduce your dependence on SSI or help you leave the SSI rolls, any money you use for this purpose will not be counted when we figure out how your current income and resources affect your payment amount. For more information, ask for *Working While Disabled—A Guide To Plans For Achieving Self-Support* (Publication No. 05-11017).

Students with disabilities— We do not count up to $1,640 of your earnings a month in 2010 (maximum of $6,600 for 2010) when we compute your SSI payment amount if you are under age 22 and go to school or are in a training program on a regular basis.

How your earnings affect your SSI payments

The amount of your SSI payments is based on how much other income you have. When your other income goes up, your SSI payments usually go down. So when you earn more than the SSI limit, your payments will stop for those months. But, your payments will automatically start again for any month your income drops to less than the SSI limits. Just tell us if your earnings are reduced, or if you stop working.

If your only income besides SSI is the money you make from your job, then we do not count the first $85 of your monthly earnings. We deduct from your SSI payments 50 cents of every dollar you earn after the $85 deduction.

Example: You work and earn $1,000 in a month. You receive no other income besides your earnings and your SSI.

$1,000	
-$85	
$915	divided by 2 = $457.50

We would deduct $457.50 from your SSI payment.

You may be eligible for a "plan to achieve self-support" which allows you to use money and resources for a specific work goal. These funds do not count when we figure out how your current income and resources affect your benefit amount.

How long your Medicaid will continue

In general, your Medicaid coverage will continue, even after your SSI payments stop, until your income reaches a certain level. That level varies with each state and reflects the cost of health care in your state. (We can tell you the Medicaid level for your state.) However, if your health care costs are higher than this level, you can have more income and keep your Medicaid. In most states, for your Medicaid to continue, you must:

- Need it to work;
- Be unable to afford similar medical coverage without SSI;
- Continue to have a disabling condition; and
- Meet all other SSI eligibility requirements.

If you qualify for Medicaid under these rules, we will review your case from time to time to see if you are still disabled or blind and still earn less than your state's allowable level.

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Social Security

Your Ticket To Work

www.socialsecurity.gov

Contacting Social Security

Visit our website

Our website, ***www.socialsecurity.gov***, is a valuable resource for information about all of Social Security's programs. At our website, you also can:

- Apply for certain kinds of benefits;
- Get the address of your local Social Security office;
- Request important documents, such as a *Social Security Statement*, a replacement Medicare card or a letter to confirm your benefit amount; and
- Find copies of our publications.

Call our toll-free number

In addition to using our website, you also can call us toll-free at **1-800-772-1213**. We treat all calls confidentially. We can answer specific questions from 7 a.m. to 7 p.m., Monday through Friday. We can provide information by automated phone service 24 hours a day. If you are deaf or hard of hearing, you may call our TTY number, **1-800-325-0778**.

We also want to make sure you receive accurate and courteous service. That is why we have a second Social Security representative monitor some telephone calls.

What's inside

Your Ticket to Work 4

How the program works 5

How to get help in using the Ticket 13

Other work incentives 14

Several million disabled and blind Americans receive monthly Social Security or Supplemental Security Income (SSI) payments. Some receive both. Many also have help from Medicare or Medicaid in paying medical bills. The impact of these programs in meeting people's needs is significant. However, many people with disabilities want to work. To help them, Social Security has a variety of work incentives, including the Ticket to Work Program.

Some of the work incentives include keeping your cash benefits and medical coverage while you transition to the work place. And, if you find that you cannot work, it is easy to start your payments again.

Your Ticket to Work

This booklet is for people who receive a Ticket to Work from Social Security. The information in this booklet will answer questions about your Ticket. It also tells you where to go if you have other questions and how to get additional help using the Ticket. If you have questions that are not answered here, you should call the Ticket Program Manager, MAXIMUS, Inc., at **1-866-968-7842**, toll-free (TTY **1-866-833-2967**).

You can use your Ticket to get the services and support you need to go to work or to earn more money. The goal is to help you earn enough money so that you can become financially independent.

The Ticket to Work program helps you obtain vocational rehabilitation, training, job referrals and other employment support services free of charge.

How the program works

When you use your Ticket, you can get help finding a job, vocational rehabilitation or other assistance. These services are provided by employment networks, which are private organizations or government agencies that have agreed to work with Social Security to provide employment services and other support to beneficiaries with disabilities and state vocational rehabilitation agencies.

How do I get started?

If you are interested in using the Ticket program to go to work or get vocational services, you should call MAXIMUS, Inc., at **1-866-968-7842**, toll-free (TTY **1-866-833-2967**). MAXIMUS is a private company that is working with us to help manage the Ticket program. MAXIMUS can answer most of your questions about your Ticket and can give you the names, addresses and telephone numbers of employment networks or the state vocational rehabilitation agency in your area.

What is an employment network?

Employment networks are organizations that can help you find a job and provide other employment services, at no cost to you. The Ticket program gives you the opportunity to choose from a variety of employment networks.

An employment network may be a single organization that provides all of the services you need, or it can be a group of providers. The employment network you choose also may work with others who are not part of the employment network to provide the services you need.

Before you give your Ticket to an employment network, you should carefully choose the one you think can best help you reach your employment goal. You are free to talk with as many employment networks as you want without having to give one your Ticket.

See the following sections for help in working with an employment network.

What happens when I contact an employment network or state vocational rehabilitation agency?

You can call or visit any employment network or state vocational rehabilitation agency. If you visit either, remember to bring your Ticket with you. They may need to get information about you from our records. You can expect staff members to ask certain questions about your disability, your work history and other subjects. This is necessary so they can decide if they can help you. You should feel free to ask them any questions about how they can help you find and keep the job that is best for you.

Can an employment network or state vocational rehabilitation agency contact me?

Yes, they may contact you to find out if you are interested in working with them. They will give you detailed information to help you decide if you are interested in giving them your Ticket.

How will an employment network or state vocational rehabilitation agency know that I have a Ticket?

MAXIMUS will keep a record of people who have Tickets and are not working with employment networks. MAXIMUS will give this information to employment networks and state vocational rehabilitation agencies.

What if I do not want to be contacted?

If you do not want to be contacted, call MAXIMUS to remove your name from the list. Even if you are not on the list, you still can participate in the Ticket program.

Do I have to work with a particular employment network or state vocational rehabilitation agency?

No, you and an employment network or state vocational rehabilitation agency must agree that you can work together. If you cannot agree, you can take your Ticket and contact another employment network. Even after you have agreed to work with an employment network or state vocational rehabilitation agency and signed a plan, you can still change your mind and move your Ticket to another network or state vocational rehabilitation agency.

What happens if an employment network or state vocational rehabilitation agency and I agree to work together?

First, the employment network will work with you to develop a plan that is right for you. The plan will state your goals for the type of work you want to do, and may include the amount of money you want to earn. The plan also will state exactly what services the employment network will provide to help you reach your goals. In addition, the plan will explain your rights under the program, including:

- Your right to take your Ticket back if you are not satisfied with the services you are receiving from the employment network; and
- Information on the availability of services and help in resolving disputes through the state protection and advocacy system. You can find more information about these services on pages 13-14.

If you and your state vocational rehabilitation agency agree to work together, and the state determines you are eligible, the state vocational rehabilitation agency will outline a plan to determine the services it will provide for you.

You or your representative (if you have one) and the employment network or state vocational rehabilitation agency will have to sign the plan before you can start working with it. The employment network or vocational rehabilitation agency should give you a copy of your plan in an accessible format. You can work with this organization to change your plan if your situation changes.

When you sign the plan with an employment network, you have "assigned" your Ticket to the employment network and you cannot work with another employment network without taking your Ticket back. If you or the employment network decide that you cannot work together, you can then reassign your Ticket to another employment network.

If you sign a plan with a state vocational rehabilitation agency, your Ticket is still available to assign to an employment network, but you must finish your work with the state vocational agency first.

What if I am unhappy with the employment network or state vocational rehabilitation agency?

There are several steps you can take if you are having a problem with your employment network. We require all employment networks to have a process to deal with situations where clients are unhappy with them. If this process is not successful, you can call MAXIMUS and ask to resolve your problem informally. If MAXIMUS cannot resolve your problem informally, it will report your problem to us.

If you work with a state vocational rehabilitation agency, the state agency must give you a description of the services available through the client assistance program. It also must give you the opportunity to resolve your grievance through mediation or an impartial hearing.

You also can ask the protection and advocacy agency in your state to help you if you are unhappy with an employment network. You can ask your protection and advocacy state agency to help you at any stage of the grievance process.

How does participating in the Ticket program affect medical reviews of my disability?

We ordinarily review your medical condition from time to time to see if you are still disabled. If we find that you are no longer disabled, we may stop your benefits.

If you are participating in the Ticket program and making timely progress pursuing your return to work plan, **we will not conduct a review of your medical condition.** We will send you more information about these requirements after you give your Ticket to an employment network or sign a plan with a state vocational rehabilitation agency.

Do I have to take part in the program?

No, the Ticket program is voluntary. If you decide that you are not interested in using your Ticket, or that you are not able to work, you do not have to take part. If you decide not to use the Ticket, it will have no effect on your disability benefits. However, you should keep the Ticket we sent you in case you change your mind and decide to take part in the program.

How to get help in using the Ticket

Where can I get more information or advice?

By calling MAXIMUS, Inc., you can also get the phone numbers for two other important sources of information and advice about the Ticket program.

1. The state protection and advocacy system

You should ask MAXIMUS to help you contact your local state protection and advocacy system if you have a disagreement with your employment network which you are unable to settle.

These state protection and advocacy agencies can help you with any complaints you have about an employment network or other provider that is helping you. And it can help you with any problems you have with the employment plan you develop with the employment network.

The state protection and advocacy system also can give you information and advice about vocational rehabilitation and employment services, including helping you select an employment network. Additionally this agency can tell you how your work may affect your benefits.

2. Work Incentives Planning and Assistance organizations

Social Security pays local community agencies to help you understand special rules that can help you go back to work.

Representatives from this program can tell you how your earnings would affect your disability benefits and the benefits you may be receiving from other government programs.

These agencies also can tell you about the other government benefits you may be able to receive.

Call MAXIMUS to find the state protection and advocacy system or Work Incentives Planning and Assistance organization nearest you.

Other work incentives

In addition to the Ticket, Social Security has other special rules called "work incentives" that help serve as a bridge between disability benefits and financial independence. These work incentives include:

- Cash benefits while you work;
- Medicare or Medicaid while you work; and

- Help with any extra work expenses you may have as a result of your disability.

You can find more information about Social Security and SSI work incentives by contacting us and asking for *Working While Disabled—How We Can Help* (Publication No. 05-10095).

www.socialsecurity.gov

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Disclosure Worksheet

Options for How Your SEE Specialist Communicates with Employers and Educators

Some people who use Supported Employment and Education (SEE) services ask their SEE specialist to talk to employers or educators on their behalf, sometimes while looking for a job or a school, and sometimes after starting work or classes. SEE specialists can contact employers or educators to help people be successful with their work and school goals, but only with the permission of the person.

For example, if a person is interested in starting a course at a community college, but she feels that she cannot concentrate well enough yet on what questions to ask a teacher, she may ask her SEE specialist to meet with the teacher together.

If a person is interested in working in pet shops, then the person may ask the SEE specialist to go with him to meet managers of local pet shops to learn more about this type of work and to talk about the person's strengths as a worker in this type of job.

When SEE specialists talk to teachers or employers, they usually tell them that they work for a NAVIGATE program at a local human service agency. The SEE specialist and the client discuss and agree ahead of time about what the specialist will say, and not say, in advance of any meeting with an employer or educator.

Sometimes having SEE specialists make some school or work contacts without clients being present helps people find a suitable school program or work a little more quickly. Also, once people in SEE start school or work, they may want to have their SEE specialist talk with a teacher or a supervisor in order to help them be more successful at education or employment. An SEE specialist is able to do this, but only with the specific permission of the person.

Other people who use SEE services decide not to give the SEE specialist permission to talk to employers or teachers on their behalf. Instead they may ask for help with job leads, filling out school applications, practicing interviewing skills, role-playing ways to ask for assistance with an assignment, or doing other things that can help them accomplish work and school goals. Some people in NAVIGATE services may use this strategy when they don't want educators or employers to know they are working with an SEE program or that they have some type of mental health symptoms.

Making Choices About Disclosure

Any option you choose for working with your SEE specialist is fine. It is important that you make your own decisions about how your SEE specialist will work with you based on your personal goals, your unique situation and what feels best to you at the current time. It's also okay to change your mind at any time during the school search or job search or after you have started a job or school program.

It is important to know that you do not have to disclose information about the presence of a disability that qualifies for an accommodation before you start a job or school in order to receive an accommodation or assistance after you start. You can still ask for an accommodation at a work place or school after you have started.

It's important for you and your SEE specialist to talk about the possible pros and cons of introducing your SEE specialist to employers or instructors.

Some examples of reasons that "Susan" may not want to use disclosure for her SEE specialist to meet with a teacher or an employer include:

- Fear that employers won't hire her or that schools won't admit her if they know about her mental health symptoms.
- Concern that her classmates or co-workers may find out she has symptoms of a mental illness

- Desire to get into school or get a job based on her own abilities and talents without the assistance of an SEE specialist.

Some examples of reasons that "Ned" wants to use disclosure for his SEE specialist to meet with a teacher or an employer include:

- Desire for help in managing his worries or fears

- Belief that employers or teachers may not see his abilities right away and that an SEE specialist can help emphasize his strengths and talents

- Belief that it will help him obtain a better work or school "match" if an employer or teacher knows that he is working with an SEE specialist

- Feeling that if an SEE specialist meets with an employer or a teacher in advance, that he will find an employer or a school that matches better with his goals and life situation

- Appreciating the assistance of an SEE specialist in meeting with him and his supervisor or teacher to work out a situation at work or school before it becomes a problem

You probably have your own feelings, preferences and ideas about disclosure and how your SEE specialist will work with you. In order to help with this decision, you may want to use this decision matrix. You may also identify areas where you want more information or are unsure of something.

	Pros	Cons
Using Disclosure		
Not Using Disclosure		

Questions about disclosure:

Deciding What You Want Your SEE Specialist to Say

If you choose to give permission to your SEE specialist to talk or meet directly with employers or instructors, you still have the right to decide what can and can't be said on your behalf.

For example, some people may be okay with an SEE specialist telling a potential teacher or employer that they are participating in NAVIGATE, which is a program to help people get back on course with their life after a recent struggle with some mental health symptoms. Some people may not want their SEE specialist to say anything about their having a mental health diagnosis. Some people may not want their specialist to say that they take medications for their mental health.

If you have some ideas about what is okay or not okay for your SEE specialist to say about you, it is helpful to list them below. It is also helpful to list questions that you have about what information you would like your SEE specialist to share.

Some things that I give my permission to say about me:

Some things I do <u>not</u> give my permission to say about me:

Some questions that I have about things to say about me:

If you think that you want your SEE specialist to speak with teachers or employers on your behalf, the two of you should discuss what he might say. For example, if a person thought he might be anxious at first, the SEE specialist could say, "Doug might have a little difficulty with concentration at first because he is anxious about doing a good job. However, after a couple of weeks, I'm sure that he will be accustomed to the job and his concentration will be fine."

In making decisions about how your SEE specialist and you will work together, please keep in mind that your SEE specialist can do many things to help you be successful at work and school even if you choose not to give permission to her to use disclosure. Your SEE specialist can review with you what she can do without disclosure in comparison to what she can do with disclosure.

You should also know that you have the right to change your mind at any point. Of course, if you decide to let your SEE specialist talk with a potential teacher before a course starts, your SEE specialist cannot take back that information after he or she has talked with the teacher. However, if you start trying to get admitted to schools without having your SEE specialist meet with school admissions staff, and you are not successful for a period of time, you may then decide to change your mind and allow the SEE specialist to meet with admissions staff on your behalf. Or, if you choose not to use disclosure during a school search, you may still decide to change your mind about disclosure after starting classes if you want your SEE specialist to meet with your teacher to help you address a concern you have with the class.

Summarizing Your Current Decisions about Disclosure

It is helpful to record your current decision below about how you want your SEE specialist to work with you and to list any questions that you might have.

☐ As of right now, I do not give my permission for my SEE specialist to talk with teachers or employers about me

☐ As of right now, I am not sure about giving my permission for my SEE specialist to talk with teachers or employers about me.

In order to make this decision I would like more information about:

☐ As of right now, I do give my permission for my SEE specialist to talk with teachers or employers about me. I understand that I will need to sign a release of information form about this. I also understand that I can change my decision regarding this at any time.

_________________________________ _____________
Person Date

_________________________________ _____________
SEE specialist Date

SEE
Follow-Along Supports for Employment Checklist

This checklist contains some information and ideas to review and consider as a person in RAISE services returns to work. For most people, the first day of work can be both exciting and stressful, sometimes confusing and challenging too. It is recommended that you and your SEE specialist review this list and discuss areas where either of you have concerns or questions.

Developing a plan and a back-up plan for different types of follow along employment supports will provide the best opportunity for people to be successful with their employment and career goals.

The SEE specialist should complete this checklist with clients prior to the beginning of the job, and then review and make revisions within two weeks of beginning the job, and then monthly or quarterly after that, depending on the client's needs.

This form is meant as a tool to stimulate discussion with the client about his or her employment, to identify the client's strengths, resources and potential challenges related to work. It is not "just a checklist."

When problem areas are identified, the specialist should engage the client in problem solving, and offer follow along supports as needed to help resolve the problem. Follow along supports should be developed collaboratively with the client.

To summarize, the SEE specialist works with the client to,

1. Review and assess each area
2. If client has a plan for each area, check off the "Client has plan" in the first column
3. If the area is not applicable to the client, enter "NA" in the "Client has a plan" column
4. If the client wants assistance, check off the "Client wants assistance" column and then write a brief plan for who will assist the client in the section "Plans for next steps."

The following areas are reviewed in this checklist

1. Planning for Work
2. Before the First Day of Work
3. Transportation
4. Social Skills
5. Communication with Employers
6. Dress and Grooming
7. NAVIGATE Supports
8. Job Dissatisfaction/Changing Jobs
9. Support and Problem Solving
10. Managing Benefits
11. Money Management
12. Symptom Management
13. Performing Job Tasks
14. Using Natural Supports
15. Organizational Skills
16. Physical Health
17. Attention and Cognitive Skills
18. Personal Routine Skills

Specialists are encouraged to cover each topic and ask how things are going in that area. It is important to do a brief review even when you think the client doesn't need help in a particular area. Specialists are often surprised to find out that there is a problem that they had not realized, and that addressing it early helps prevent it from becoming a bigger problem that's harder to solve. Reviewing areas also helps to identify strengths and resources the client has and may not be aware of yet.

When problems, or potential problems, are identified, check them off, and explore with the client the specific follow-along supports that are available in that area to help him or her address the problem effectively. Possible follow-along supports are listed under each job area. When follow-along supports are identified, a brief plan should be made for following through with providing them. This plan should include who does what, when, and where.

1. Planning for Work		
Current strengths, resources and challenges:		
	Client has plan	Client wants assistance
a. Taking medications to work		
b. Waking up and getting ready for work		
c. Clothes/uniform for work		
d. Child care / pet care		
e. Transportation to and from work		
f. Identification / information for work		
g. Other:		
h. Other:		
Plans for next steps (refer to letter above):		

2. Before the First Day of Work		
Current strengths, resources and challenges:		
	Client has plan	Client wants assistance
a. Contacting SEE specialist		
b. Managing worries about starting work		
c. Meeting or phone contact the night before		
d. Meeting or phone call the morning of work		
e. Questions the day / night before		
f. Sleeping night before		
g. Schedule for first day		
h. Where to report for first day		
i. Food and beverages for first day		
j. Meeting or phone call after the first day		
k. Other:		
l. Other:		
Plans for next steps (refer to letter above):		

3. Transportation		
Current strengths, resources and challenges:		
	Client has plan	Client wants assistance
a. Using personal vehicle		
b. Getting ride from family/friend/co-worker		
c. Using public transportation (e.g., learning how to use or use more effectively)		
d. Using alternative transportation (bicycle, walking, ride sharing, taxi)		
e. Other:		
f. Other:		
Plans for next steps (refer to letter above):		

4. Social Skills		
Current strengths, resources and challenges:		
	Client has plan	Client wants assistance
a. Working through job problems related to social skills		
b. Starting conversations with co-workers		
c. Improving interactions with co-workers		
d. Improving interactions with supervisor		
e. Improving interactions with customers		
f. Managing offers to use alcohol/drugs from co-workers		
g. Learning unwritten rules of work place		
h. Other:		
i. Other:		
Plans for next steps (refer to letter above):		

5. Communication with Employer		
Current strengths, resources and challenges:		
	Client has plan	Client wants assistance
a. Explaining symptoms or behaviors related to symptoms		
b. Explaining psychiatric disorder		
c. Asking for job accommodations		
d. Asking for feedback about work performance		
e. Asking for assistance with work instructions or tasks		
f. Problem solving about work performance		
g. Problem solving with social difficulties		
h. Other:		
i. Other:		
Plans for next steps (refer to letter above):		

6. Dress and Grooming		
Current strengths, resources and challenges:		
	Client has plan	Client wants assistance
a. Finding work clothes		
b. Verbal encouragement to adjust clothing		
c. Quick meeting before work to ensure work ready dress and clothing		
d. Clean clothes on a regular basis		
e. Obtaining personal hygiene products		
f. Prompts for personal hygiene		
g. Prompts for glasses/ hearing aid		
h. Other:		
i. Other:		
Plans for next steps (refer to letter above):		

7. NAVIGATE Supports		
Current strengths, resources and challenges:		
	Client has plan	Client wants assistance
a. Understanding the psychiatric illness		
b. Managing medication side effects at work		
c. Timing of taking medications at work		
d. Medication review for symptoms at work		
e. Personal disclosure with co-workers		
f. Developing family supports for work		
g. Discussing disability benefits		
h. Coping with symptoms at work		
i. Dealing with negative feelings at work		
j. Decreasing substance use		
k. Improving nutrition and exercise		
l. Increasing personal resiliency		
m. Decreasing smoking		
n. Having fun and developing good relationships at work		
o. Other		
p. Other		
Plans for next steps (refer to letter above):		

8. Job Dissatisfaction / Changing Jobs		
Current strengths, resources and challenges:		
	Client has plan	Client wants assistance
a. Exploring pro's and con's of current job		
b. Problem-solving about what could improve satisfaction on the job		
c. Help with talking to employer about job satisfactions and dissatisfactions		
d. Help with looking at other jobs with the same employer		
e. Help with leaving the job based on personal preferences		
f. Help with giving notice		
g. Help with getting references from work		
h. Help with finding a new job		
i. Help with career development (new work goals, furthering education, learning new skills)		
j. Other:		
k. Other:		
Plans for next steps (refer to letter above):		

9. Support and Problem solving		
Current strengths, resources and challenges:		
	Client has plan	Client wants assistance
a. Regular meetings away from job site		
b. Regular lunch or break meetings at job site		
c. Observing the person during work		
d. Supportive phone calls before work		
e. Supportive phone calls during breaks or lunch		
f. Supportive phone calls after work		
g. Group supports for work		
h. Other:		
i. Other:		
Plans for next steps (refer to letter above):		

10. Managing Benefits		
Current strengths, resources and challenges:		
	Client has plan	Client wants assistance
a. Help with accessing benefits counseling before starting work		
b. Help with accessing benefits counseling with earnings changes		
c. Help with tracking and reporting income to benefits programs		
d. Prompts to help remember to track and report income to benefits programs		
e. Monthly meetings to review earnings and benefits		
f. Help with work incentive programs		
g. Other:		
h. Other:		
Plans for next steps (refer to letter above):		

11. Financial Planning		
Current strengths, resources and challenges:		
	Client has plan	Client wants assistance
a. Help with opening a bank account		
b. Help with saving money strategies		
c. Help with setting up a monthly budget		
d. Assistance with shopping/paying bills on payday		
e. Setting up a direct deposit account		
f. Setting up a savings account		
g. Other:		
h. Other:		
Plans for next steps (refer to letter above):		

12. Managing Symptoms		
Current strengths, resources and challenges:		
	Client has plan	Client wants assistance
a. Addressing medication side effects at work		
b. Using medications for symptom management at work		
c. Using coping skills for symptom management at work		
d. Using relapse prevention/ WRAP/early warning signs and strategies at work		
e. Using strategies for reducing stress at work		
f. Using relaxation strategies at work		
g. Other:		
h. Other:		
Plans for next steps (refer to letter above):		

13. Performing Job Tasks		
Current strengths, resources and challenges:		
	Client has plan	Client wants assistance
a. Learning/practicing job duties		
b. Learning/practicing job skills		
c. Assistance with breaking down job duties and tasks		
d. Requesting work environment modifications		
e. Requesting accommodations at work		
f. Other:		
g. Other:		
Plans for next steps (refer to letter above):		

14. Using Natural Supports		
Current strengths, resources and challenges:		
	Client has plan	Client wants assistance
a. Discussion about benefits of employment with family and other supports		
b. Problem solving with family and other supports regarding completing home and family responsibilities		
c. Education for family and other supports about psychiatric illness		
d. Involving family and other supports in helping with medication use		
e. Involving family and other supports to help person get to work on time		
f. Other:		
g. Other:		
Plans for next steps (refer to letter above):		

15. Organizational Skills		
Current strengths, resources and challenges:		
	Client has plan	Client wants assistance
a. Using a calendar / organizer for work schedule		
b. Prompts to use work schedule		
c. Using an alarm for work		
d. Using a list for job tasks		
e. Developing written instructions for job tasks		
f. Using prompts at work		
g. Other:		
h. Other:		
Plans for next steps (refer to letter above):		

16. Physical Health		
Current strengths, resources and challenges:		
	Client has plan	Client wants assistance
a. Managing smoking at work		
b. Managing other tobacco use at work		
c. Making dietary changes		
d. Managing inhaler at work		
e. Scheduling appointments with primary care physician		
f. Improving nutrition		
g. Increasing exercise		
h. Other:		
i. Other:		
Plans for next steps (refer to letter above):		

17. Attention and Cognitive Skills		
Current strengths, resources and challenges:		
	Client has plan	Client wants assistance
a. Reviewing SEE handout regarding cognitive challenges		
b. Improving concentration at the workplace		
c. Scheduling rest breaks		
d. Matching job time to client's alertness		
e. Breaking down tasks into small steps at work		
f. Developing checklists for work		
g. Other:		
h. Other:		
Plans for next steps (refer to letter above):		

18. Personal Routine Skills		
Current strengths, resources and challenges:		
	Client has plan	Client wants assistance
a. Developing a regular sleep schedule (including getting up and going to sleep at the same time every day)		
b. Developing regular mealtimes		
c. Developing schedules for housecleaning		
d. Doing shopping on a regular basis		
e. Developing a regular schedule for work		
f. Using a schedule for laundry (to have clean clothes for work)		
g. Eating healthy meals (including meals at work)		
h. Scheduling time for fun and recreation outside of work		
i. Other:		
j. Other:		
Plans for next steps (refer to letter above):		

SEE
Follow-Along Supports for Education Checklist

This checklist contains some information and ideas to review and consider as a person in RAISE services returns to school or education. For most people, the first day of class can be both exciting and stressful, sometimes confusing and challenging too. It is recommended that you and your SEE specialist review this list and discuss areas where either of you have concerns or questions.

Developing a plan and a back-up plan for different types of follow along education supports will provide the best opportunity for people to be successful with their education and career goals.

The SEE specialist should complete this checklist with clients prior to the beginning of school or class, and then review and make revisions within two weeks after school starts and then monthly or quarterly after that, depending on the client's needs. It is useful to review this list thoroughly before new classes, a new semester, or a new academic year starts.

This form is meant as a tool to stimulate discussion with the client about his or her learning and education experience and to help clearly identify the client's strengths, resources and potential challenges related to school. It is much more than "just a checklist."

When challenges or problem areas are identified, the specialist should engage the client in problem solving, and offer follow along supports as needed to help resolve the problem. Follow along supports should be developed collaboratively with the client.

To summarize, the SEE specialist works with the client to:

1. Review and assess each area
2. If client has a plan for each area, check off the "Client has plan" in the first column
3. If the area is not applicable to the client, enter "NA" in the "Client has a plan" column
4. If the client wants assistance, check off the "Client wants assistance" column and then write a brief plan for who will assist the client in the section "Plans for next steps."

The following areas are reviewed in this checklist:

1. Planning for School
2. First Day of School
3. Transportation
4. Social Skills
5. Communication with Teachers
6. Dress and Grooming
7. NAVIGATE Supports
8. Course Dissatisfaction/Changing courses or schools
9. Support and Problem Solving
10. Money Management
11. Symptom Management
12. Learning in the Classroom
13. Learning and Assignments outside of Class
14. Using Natural Supports
15. Organizational Skills
16. Physical Health
17. Attention and Other Cognitive Skills
18. Personal Routine Skills

Specialists are encouraged to cover each topic and ask how things are going in that area. It is important to do a brief review even when you think the client doesn't need help in a particular area. Specialists are often surprised to find out that there is a problem that they had not realized, and that addressing it early helps prevent it from becoming a bigger problem that's harder to solve. Reviewing areas also helps to identify strengths and resources the client has and may not be aware of yet.

When challenges, or potential problems, are identified, check them off, and explore with the client the specific follow-along supports that are available in that area to help him or her address the problem effectively. Possible follow-along supports are listed under each education area. When follow-along supports are identified, a brief plan should be made for following through with providing them. This plan should include who does what, when, and where.

1. Planning for School		
Current strengths, resources and challenges:		
	Client has plan	Client wants assistance
a. Taking medications to school or class		
b. Waking up and getting ready for school		
c. Clothes for school		
d. Child care / pet care		
e. Transportation to and from school		
f. Getting books or supplies for school		
g. Visiting bookstores		
h. Confirming registration for school or classes		
i. Knowing how to access Student Disability Services		
j. Identification / information for school		
k. Visiting library		
l. Other:		
m. Other:		
Plans for next steps (refer to letter above):		

2. Before the First Day of School		
Current strengths, resources and challenges:		
	Client has plan	Client wants assistance
a. Contacting SEE specialist		
b. Managing worries about starting school		
c. Meeting or phone contact the night before school starts		
d. Meeting or phone call the morning of school		
e. Questions the day / night before		
f. Sleeping night before		
g. Schedule for first day of school/class		
h. Where to report for first class		
i. Food and beverages for first of school		
j. Meeting or phone call after the first day of school		
k. Other:		
l. Other:		
Plans for next steps (refer to letter above):		

3. Transportation		
Current strengths, resources and challenges:		
	Client has plan	Client wants assistance
a. Using personal vehicle		
b. Getting ride from family/friend/other student		
c. Using public transportation (e.g., learning how to use or use more effectively)		
d. Using student transportation services		
e. Using alternative transportation (bicycle, walking, ride sharing, taxi)		
f. Other:		
g. Other:		
Plans for next steps (refer to letter above):		

4. Social Skills		
Current strengths, resources and challenges:		
	Client has plan	Client wants assistance
a. Working through school problems related to social skills		
b. Starting conversations with other students		
c. Improving interactions with other students		
d. Starting conversations with teachers		
e. Improving interactions with teachers		
f. Managing offers to use alcohol/drugs from other students		
g. Learning unwritten rules of the classroom/campus		
h. Other:		
i. Other:		
Plans for next steps (refer to letter above):		

5. Communication with Other Students and Teachers		
Current strengths, resources and challenges:		
	Client has plan	Client wants assistance
a. Explaining symptoms or behaviors related to symptoms		
b. Explaining psychiatric disorders		
c. Asking for educational accommodations		
d. Asking for feedback about school performance		
e. Asking for assistance with understanding information in class		
f. Asking for assistance with home assignments		
g. Problem solving about school performance		
h. Problem solving with social difficulties at school		
i. Other:		
j. Other:		
Plans for next steps (refer to letter above):		

6. Dress and Grooming		
Current strengths, resources and challenges:		
	Client has plan	Client wants assistance
a. Finding school clothes		
b. Verbal encouragement to adjust clothing		
c. Quick meeting before school to check out clothing		
d. Clean clothes on a regular basis		
e. Obtaining personal hygiene products		
f. Prompts for personal hygiene		
g. Prompts for glasses / hearing aid		
h. Other:		
i. Other:		
Plans for next steps (refer to letter above):		

7. NAVIGATE Supports		
Current strengths, resources and challenges:		
	Client has plan	Client wants assistance
a. Understanding the psychiatric illness		
b. Managing medication side effects at school		
c. Timing of taking medications at school		
d. Timing of taking medications and study schedule		
e. Medication review for symptoms at school		
f. Personal disclosure with other students or teachers		
g. Developing family supports for school		
h. Improving symptom management at school or studying		
i. Dealing with negative feelings at school		
j. Decreasing substance use		
k. Improving nutrition and exercise		
l. Increasing personal resiliency		
m. Decreasing smoking		
n. Having fun and developing good relationships at school		
o. Other		
p. Other		
Plans for next steps (refer to letter above):		

8. Course Dissatisfaction/Changing Courses or Schools		
Current strengths, resources and challenges:		
	Client has plan	Client wants assistance
a. Exploring pro's and con's of current course or school		
b. Problem-solving about what could improve satisfaction with school		
c. Help with talking to teacher about course satisfactions and dissatisfactions		
d. Help with looking at other classes with the same school		
e. Help with leaving the school based on personal preferences		
f. Help with transferring credits or courses		
g. Help with finding a new class or school		
h. Help with career development (new school goals, employment, learning new skills)		
i. Other:		
j. Other:		
Plans for next steps (refer to letter above):		

9. Support and Problem solving		
Current strengths, resources and challenges:		
	Client has plan	Client wants assistance
a. Regular meetings away from the school or classroom		
b. Regular lunch or break meetings at school		
c. Reviewing study habits, routines and skills		
d. Problem-solving ways to improve study habits		
e. Supportive phone calls before school		
f. Supportive phone calls during breaks or lunch		
g. Supportive phone calls after school		
h. Group supports for school		
i. Other:		
j. Other:		
Plans for next steps (refer to letter above):		

10. Money Management		
Current strengths, resources and challenges:		
	Client has plan	Client wants assistance
a. Help with opening a bank account		
b. Help with saving money strategies		
c. Help with setting up a monthly budget		
d. Assistance with shopping/paying bills		
e. Setting up a direct deposit account		
f. Setting up a savings account		
g. Identifying financial aid resources at school		
h. Other:		
i. Other:		
Plans for next steps (refer to letter above):		

11. Symptom Management		
Current strengths, resources and challenges:		
	Client has plan	Client wants assistance
a. Addressing medication side effects at school		
b. Addressing medication side effects and studying		
c. Using medications for symptom management at school		
d. Using coping skills for symptom management at school		
e. Using relapse prevention and early warning signs strategies at school		
f. Using strategies for reducing stress at school		
g. Using relaxation strategies at school		
h. Other:		
i. Other:		
Plans for next steps (refer to letter above):		

12. Learning in the Classroom		
Current strengths, resources and challenges:		
	Client has plan	Client wants assistance
a. Note taking skills in the classroom		
b. Using audio recording devices in the classroom		
c. Practicing asking questions in the classroom		
d. Concentration challenges in the classroom		
e. Requesting classroom accommodations		
f. Requesting assistance with in class assignments		
g. Requesting accommodations for in class tests		
h. Other:		
i. Other:		
Plans for next steps (refer to letter above):		

13. Learning and Assignments Outside of the Classroom		
Current strengths, resources and challenges:		
	Client has plan	Client wants assistance
a. Tracking assignments		
b. Establishing study times and routines		
c. Accessing academic assistance at school		
d. Accessing study skills trainings at school		
e. Concentration challenges while studying		
f. Requesting accommodations for assignments		
g. Requesting assistance with assignments		
h. Requesting accommodations for take home exams		
i. Identifying other students to study with		
j. Identifying family or other supports with studying		
k. Other:		
l. Other:		
Plans for next steps (refer to letter above):		

14. Using Natural Supports		
Current strengths, resources and challenges:		
	Client has plan	Client wants assistance
a. Discussion about benefits of school with family and other supports		
b. Problem solving with family and other supports regarding completing home and family responsibilities		
c. Education for family and other supports about psychiatric illness		
d. Involving family and other supports in helping with medication use		
e. Involving family and other supports to help person get to school or class on time		
f. Involving family and other supports to help person with studying skills		
g. Other:		
h. Other:		
Plans for next steps (refer to letter above):		

15. Organizational Skills		
Current strengths, resources and challenges:		
	Client has plan	Client wants assistance
a. Using a calendar / organizer for class schedule		
b. Using a calendar/organizer for assignments		
c. Prompts to use class schedule or calendar		
d. Using an alarm for school		
e. Using a checklist for school assignments and studying		
f. Breaking school assignments into smaller tasks		
g. Using prompts for studying or assignments		
h. Other:		
i. Other:		
Plans for next steps (refer to letter above):		

16. Physical Health		
Current strengths, resources and challenges:		
	Client has plan	Client wants assistance
a. Managing smoking at school		
b. Managing other tobacco use at school		
c. Making dietary changes		
d. Managing inhaler at school		
e. Scheduling appointments with primary care physician		
f. Improving nutrition		
g. Increasing exercise		
h. Other:		
i. Other:		
Plans for next steps (refer to letter above):		

17. Attention and Other Cognitive Skills		
Current strengths, resources and challenges:		
	Client has plan	Client wants assistance
a. Reviewing SEE handout regarding cognitive challenges		
b. Improving concentration in the classroom		
c. Improving study skills		
d. Scheduling rest breaks from studying		
e. Matching class time and schedule to client's alertness		
f. Matching study time and schedule to client's alertness		
g. Making plans/schedule for getting assignments completed		
h. Developing checklists for school		
i. Other:		
j. Other:		
Plans for next steps (refer to letter above):		

18. Personal Routine Skills		
Current strengths, resources and challenges:		
	Client has plan	Client wants assistance
a. Developing a regular sleep schedule (including getting up and going to sleep at the same time every day)		
b. Developing regular mealtimes		
c. Developing schedules for housecleaning		
d. Doing shopping on a regular basis		
e. Developing a regular schedule for school and studying		
f. Using a schedule for laundry (to have clean clothes for school)		
g. Eating healthy meals (including meals at school)		
h. Scheduling time for fun and recreation outside of school		
i. Other:		
j. Other:		
Plans for next steps (refer to letter above):		

SEE Supervision Worksheet

The SEE specialist should prepare for supervision in advance by answering the questions in Section I, “Preparation for Supervision.” At the beginning of working with a person, there may be less information available than after the SEE specialist and the client have worked together for some time. At every stage in the process of working with the person it is important to take time to carefully develop questions for the supervision session.

I. Preparation for Supervision:

A. How can this supervision be helpful to you in your work with the client to help him or her to achieve employment and education goals? What challenges have you and the client encountered that you would like some suggestions for?

B. Client information:

1. What are the clients specific Employment Goals & Objectives?

2. What are the clients specific Education Goals & Objectives?

C. Summary of Progress to Date:

1. What supports are being provided for helping the client to achieve their Employment & Educational Goals?

2. What is the status with other NAVIGATE services?

   a. Medications

   b. Family Education Program

   c. Individual Resiliency Training (IRT)

3. What specific client strengths have been identified?

4. What specific natural supports & resources have been identified?

5. What strategies and services have you provided as the SEE specialist?

6. What has been the client's response to these strategies and services?

II. Supervision Process:

A. Brainstorm, with your supervisor, ideas and strategies for helping the client to make more progress and/or addressing challenges identified in Section I. Consider the client's strengths, natural resources, SEE resources, and other NAVIGATE services that could help the client achieve his or her employment and educational goals and objectives. Write down these ideas at first without commentary on their effectiveness.

Strategies for addressing challenges	Pros	Cons

B. The SEE specialist reviews the written list of ideas that have been generated, briefly evaluates the pros and cons of each and then picks one or two to propose using with the client.

1. ____

2. ____

III. Follow Up:

At the next supervision meeting the SEE specialist provides an update of the client's response to the strategies that were proposed.

SEE Progress Note Client ID:______
Form Date: unknown

Clinician Contact & Progress Note For Supported Employment and Education (SEE)

☐ No SEE contact in the last 30 days complete status update

If you have had NO CONTACT with the client in the past month, please check off the box above and check all of the client status descriptions that apply below.

Participant ID #:________
A. Any client contact? (1=yes, 0=no) __________
A1. Are there any status changes? (1=yes, 0=no) __________
B. Date:_______________
C. Clinician ID#: ________

COMPLETE THIS FORM FOR ALL CONTACTS WITH OR ON BEHALF OF THE CLIENT (except "reminder calls") OR WHEN THERE IS A CHANGE IN CLIENT STATUS (e.g. started or stopped school)

1. Client status update (Check all items the client worked on since the last session with or without you.)

1a. Education ☐ Client interested in education	**1b. Employment** ☐ Client interested in employment
☐ 1A1. Orientation to SEE services completed	☐ 1B1. Orientation to SEE services completed
☐ 1A2. Client working on completing Career Profile	☐ 1B2. Client working on completing Career Profile
☐ 1A3. Client completed Career Profile	☐ 1B3. Client completed Career Profile
☐ 1A4.Client developed educational goals	☐ 1B4. Client developed employment goals
☐ 1A5. Client participated in benefits counseling	☐ 1B5. Client participated in benefits counseling
☐ 1A6. Client visited school or education program	☐ 1B6. Client visited potential place of employment
☐ 1A7. Client had in person contact with school personnel	☐ 1B7. Client had in person contact with potential employer
☐ 1A8. Client had interview at school	☐ 1B8. Client had interview with potential employer
☐ 1A9. Client enrolled in class or school (e.g. GED course, certificate program, community college or other educational programs)	☐ 1B9. Client enrolled in work related activity (e.g. internship, volunteer position)
☐ 1A10. Client continuing a class or school program	☐ 1B10. Client started competitive employment position (Community-based employment at prevailing wages, which reflect the person's employment preferences and goals. The term includes positions in mainstream settings that are part or full time for any number of hours and result in payment of FICA tax.)
☐ 1A11. Client completed a class, term or semester	☐ 1B11. Client continuing competitive employment
☐ 1A12. Client graduated from school or educational program	☐ 1B12. Client stopped competitive employment
☐ 1A13. Client withdrew from educational program or class	☐ 1B13. Other (if other employment stauts is YES, specify below): 1B14. ______________________________
☐ 1A14. Other (if other education status is YES, specify below): 1A15. ______________________________	

SEE Progress Note
Form Date: unknown

Client ID:______

2. People present: **(check all that apply for this contact)**

☐ 2A. Client

☐ 2B. Family (if yes, specify) 2Bs. (specify relationship): ____________________________________

☐ 2C. Other supporters (if yes, specify) 2Cs. (specify relationship): ____________________________________

☐ 2D. NAVIGATE Team Members (if yes, specify) 2Ds. (specify role):____________________________________

☐ 2E. Potential teacher/instructor

☐ 2F. Teacher/instructor

☐ 2G. Potential employer

☐ 2H. Employer/work supervisor

☐ 2I. Others Please describe: 2Is. ____________________________________

3. Total number of persons who participated in contact: ☐☐
(Please do not count yourself "the SEE Specialist" in this total)

4. Amount of in person Contact time for SEE specialist with client or others in minutes ☐☐

(The "Amount of in person Contact time" is time in contact with the client and others on behalf of, or in support of the client. Time spent traveling ***with*** a client to the contact point should be included in this time.)

4 A. Amount of Travel Time for SEE specialist for this contact in minutes ☐☐

(The "Amount of Travel Time" is the time spent in travel to get to the contact point round trip with or without the client. This is travel time of the staff..)

5. Location of contact: (check all that apply)

☐ 5.1. Agency

☐ 5.2. Employer/business

☐ 5.3. School

☐ 5.4. Client's residence

☐ 5.5. Telephone

☐ 5.6. Other community location (e.g. coffee shop, library, social security office, VR office)
(if yes, specify): ____

6. Brief description of session, contact, or client status: **(include: strategies, interventions, client reaction to contact, next steps etc) (This is an optional field)**

____

____

____

____

____

7. Completion of mutually agreed upon client task from previous meeting:

- ☐ 7.1. Completed
- ☐ 7.2. Partially Completed
- ☐ 7.3. Nothing completed
- ☐ 7.4. Not Applicable

8. Orientation and Treatment Planning:

- ☐ 8.1. SEE orientation meeting
- ☐ 8.2. Developing SEE treatment plan goals
- ☐ 8.3. Other (if yes and/or more than one, specify): ____________________________________
- ☐ 8.4. Pursuing current SEE goals

9. Assessment:

- ☐ 9.1. Gathering SEE information/inventory regarding work and/or education history, skills, goals and preferences with client.
- ☐ 9.2. Assisting client to visit work or school settings to develop client preferences and goals re: work and /or school
- ☐ 9.3. Other (if yes and/or more than one, specify): ______________________________
- ☐ 9.4. Assessing client's need for follow-along supports.

10. Placement:

SEE Progress Note
Form Date: unknown

Client ID:______

☐ 10a. Education	☐ 10B. Employment
☐ 10A1.Discussion and planning re: <u>disclosure decisions and role of SEE</u> 10A2. Indicate client's <u>current</u> decision regarding disclosure: (select one) ☐ 1. Client wants to use disclosure ☐ 2. Client unsure about using disclosure ☐ 3. Client does not want to use disclosure ☐ 10A3. Discussion and planning re: <u>use of office of student disability services</u> ☐ 10A4.<u>School searching</u> ☐ 10A5. Newspaper search ☐ 10A6. Internet search ☐ 10A7. Reviewing school catalogues ☐ 10A8. In person ☐ 10A9. Interview preparation/skills training ☐ 10A10. Assisting client with completing forms or applications ☐ 10A11.Other (if yes other education, specify below): 10A12. Other - specified _______________________________________	☐ 10B1. Discussion and planning re: <u>disclosure decisions and role of SEE</u> 10B2. Indicate client's <u>current</u> decision regarding disclosure: ☐ 1. Client wants to use disclosure ☐ 2. Client unsure about using disclosure ☐ 3. Client does not want to use disclosure ☐ 10B3. Information gathering/planning re: <u>"benefits applications" or "work incentive planning"</u> ☐ 10B4. <u>Job searching</u> ☐ 10B5. Newspaper search ☐ 10B6. Internet search ☐ 10B7. At business/employers ☐ 10B8. Interview preparation/skills training ☐ 10B9. Assisting client with completing applications or resume ☐ 10B10. Other (if yes other employment, specify below): 10B11. Other – specified _______________________________________

11. <u>Follow Along Supports (for clients who are working or attending school):</u>

SEE Progress Note
Form Date: unknown

Client ID:______

☐ 11a. Education	☐ 11B. Employment
☐ 11A1. Follow along school supports ☐ 11A2. Discussing or revisiting disclosure plan 11A3. Indicate client's current decision regarding disclosure: ☐ 1. Client wants to use disclosure ☐ 2. Client unsure about using disclosure ☐ 3. Client does not want to use disclosure ☐ 11A4. Assisting with requesting accommodations ☐ 11A5. Assisting with development and use of natural supports for school ☐ 11A6. Problem solving difficulties with school ☐ 11A7. Reviewing stress management for school ☐ 11A8. Reviewing coping skills for symptoms for school ☐ 11A9. Developing or using coping strategies for cognitive difficulties for school ☐ 11A10. Providing social skills training for school ☐ 11A11. Other (if yes other education follow-along supports, specify below): 11A12. Other – specified ________________________________	☐ 11B1. Follow along job supports ☐ 11B2. Discussing or revisiting disclosure plan 11B3. Indicate client's current decision regarding disclosure: ☐ 1. Client wants to use disclosure ☐ 2. Client unsure about using disclosure ☐ 3. Client does not want to use disclosure ☐ 11B4. Assisting with requesting accommodations ☐ 11B5. Assisting with development and use of natural supports for work ☐ 11B6. Problem solving difficulties with work ☐ 11B7. Reviewing stress management for work ☐ 11B8. Reviewing coping skills for symptoms for work ☐ 11B9. Developing or using coping strategies for cognitive difficulties for work ☐ 11B10. Providing social skills training for work ☐ 11B11. Other (if yes other employment follow-along supports, specify below): 11B12. Other - specified ________________________________

12. Mutually agreed upon client task for next meeting: (This is an optional field)

____

____

____

____

____

____

SEE Fidelity Description

The goal of SEE fidelity is to help NAVIGATE programs to provide the most effective services to clients who have goals related to their careers, employment and education. Fidelity measures how closely SEE services follow the principles of SEE. Good SEE fidelity is achieved by the whole NAVIGATE team working in a highly integrated fashion with SEE services.

The SEE fidelity scale contains nine items that are based directly on the principles of SEE, the items are:

1. Zero Exclusion
2. SEE Services Integrated with All NAVIGATE Services
3 Focus on Competitive Employment When Work is the Goal and Focus on Integrated Education When School is the Goal *(items 3A & 3B)*
4. Comprehensive Assessment
5. Respect for Personal Preferences
6. Benefits Counseling
7. Rapid Job and School Search
8. Follow-along Supports
9. Community-based Services

Fidelity for SEE programs will be assessed by using information gathered from different sources. The majority of information used to assess fidelity will be derived from SEE Contact Sheets, the Career and Education Inventory, and information from the NAVIGATE director.

In general, SEE fidelity provides information about the person-centered nature of services, the integration of SEE services, respect for preferences, the timeliness of services, and the comprehensiveness of SEE services provided.

The following table briefly summarizes the key sources of information for each SEE fidelity item.

SEE Fidelity Item	Key Sources of Information
1. Zero Exclusion	• Clients enrolled in NAVIGATE at site from ETP database • SEE contact sheets
2. SEE Services Integrated with all NAVIGATE Services	• Director's Contact Sheets for NAVIGATE Team Leadership Meetings
3. Focus on Competitive Employment When Work is the Goal and Focus on Integrated Education When School is the	• SEE contact sheets

SEE Fidelity Item	Key Sources of Information
Goal *(Items 3A & 3B)*	
4. Comprehensive Assessment	• SEE contact sheets • Career and Education Inventory
5. Respect for Personal Preferences	• SEE contact sheets • Career and Education Inventory
6. Benefits Counseling	• SEE contact sheets 1. Career and Education Inventory
7. Rapid Job and School Search	2. SEE contact sheets
8. Follow-along Supports	3. SEE contact sheets
9. Community-based Services	4. SEE contact sheets

1. Zero Exclusion

All clients in NAVIGATE services are given opportunities to enroll in SEE services and are encouraged to do so. Given the key developmental tasks related to developing careers, employment and educational trajectories that many people in NAVIGATE services are working on, SEE can play a critical role in helping people to overcome challenges related to making progress related to education and employment.

All people in NAVIGATE services should have the chance to meet with the SEE specialist early in their orientation to NAVIGATE services. Some people may have clear goals and ideas related to work and school and may want to start SEE services at that point. Other people may be hesitant, ambivalent or unsure of wanting to focus on work or school and may not want to start SEE services after the initial meeting with an SEE specialist. For these people, a second meeting should be offered within the next couple of months to explore their interest in work or school again.

One part of the data for this item comes from the NAVIAGATE director, who keeps track of the total number of clients enrolled in NAVIGATE services. The other data come from the SEE contact sheet, in which the SEE specialist records all contacts with clients, including clients with whom the SEE specialist is meeting for the first time to discuss SEE services. The ratio of clients who meet in person with the SEE specialist within one month of starting NAVIGATE services is produced by the following formula, based on data collected over the past six months.

$$\frac{\text{\# Clients who have met with SEE specialist in person within one month of starting NAVIGATE}}{\text{\# Clients in NAVIGATE}}$$

2. SEE Services Integrated with All NAVIGATE Services

SEE specialists work closely and collaboratively with all NAVIGATE service providers in all phases of the employment or education process. SEE specialists are active and full members of the NAVIGATE team and as such, they regularly participate in all weekly NAVIGATE team meetings as well as have regular communication with other NAVIGATE team members when needed. During team meetings, SEE specialists work actively to identify strengths, talents, symptoms, challenges and resources for each client in SEE services that will be important in helping people to achieve their career goals. SEE specialists constantly look for opportunities to customize other NAVIGATE services to be helpful to clients in coping with illness-related challenges, cognitive challenges, or other potential barriers to their success. SEE specialists also actively share information about the clients they are working with on a regular basis with the rest of the team. SEE specialists also participate in discussions regarding clients who are not yet participating in SEE services or who have chosen not to participate in SEE services. SEE specialists serve as consultants to the other team members for these clients in thinking about work or education.

The data for this come from the Director's Contact Sheets for NAVIGATE Team Leadership Meetings, which tracks all team meetings and attendance by team members at those meetings. The item is calculated using information for the past six months with the following formula:

$$\frac{\text{\# NAVIGATE Team meetings SEE specialist actively participated}}{\text{\# NAVIGATE Team meetings held}}$$

3. Focus on Competitive Employment When Work is the Goal and Focus on Integrated Education When School is the Goal *(items 3A & 3B)*

A fundamental principle of NAVIGATE and SEE is that they are based on the person's own circumstances, needs, preferences and goals. In SEE this principle includes assuring that the client's choices of goals for education and employment are honored and respected. While helping clients to develop career goals and preferences, the SEE specialist works to understand and explore the client's hopes, desires and view of their future rather than to constrain or redirect them. Likewise, once the person has established a personally meaningful goal for education or employment. The SEE specialist honors that goal by helping the client to make progress towards enrolling in a course or educational program that fits with the person's goals, or finding employment that is consistent with what the person has identified. Some people may change their mind about actively working on employment or education goals and some people may change their mind about their specific goals. In these situations, it is important for the SEE specialist to document changes and to keep the NAVIGATE team apprised of these changes.

The SEE specialist completes a contact sheet for all client contacts and for important updates. When the client has identified a specific education or employment goal, this is indicated on the SEE contact sheet in the client status update section. Any contacts between the client and a perspective employer, educator or school personnel are also noted in that client status update section.

The data for assessing this item for clients with employment goals come from the SEE contact sheets over the past six months and the fidelity score is calculated using this formula (3A):

$$\frac{\text{\# Clients not employed who had in person contact with potential employer within past month}}{\text{\# Clients who have a specific employment goal}}$$

The data for assessing this item for clients with education goals come from the SEE contact sheets over the past six months, with fidelity calculated using this formula (3B):

$$\frac{\text{\# Clients not in school who had in person contact with educator or school personnel within past month}}{\text{\# Clients who have a specific education goal}}$$

In assessing these two items, clients who have identified both specific employment and education goals, are counted in both items separately. The scores for items 3A and 3B are averaged to produce one score for this item.

4. Comprehensive Assessment

As with other NAVIGATE services, SEE services are based on the development of a good, comprehensive and holistic assessment of the person, including their individual strengths, talents, interests, preferences and goals. SEE relies upon this assessment for all stages of the education and employment process. In SEE, this assessment is found in the Career and Education Inventory in the appendix of the SEE manual. One of the key tasks of the SEE specialist is to work with the client, their family and other natural supports (with the person's consent) and other members of the NAVIGATE team to complete a sound assessment. Some clients may come into NAVIGATE services with very clear preferences and goals, or may already be working or enrolled in educational programs. In these situations, which will most likely be limited, the SEE specialist may choose to start with a less than full assessment if the person's needs are pressing. Even in these cases, revisiting and completing the assessment that is contained in the Career and Education Inventory at a later point will be helpful to the client and the SEE specialist.

The Career and Education Inventory should be initially filled out over multiple meetings between the person and the SEE specialist. At least one of those meetings should be held at the person's residence in order to expand the information gathered and help the SEE specialist learn more about the person in the context of their living environment. In some cases, the SEE specialist and the client may develop some mutually agreed upon tasks for the person to complete some or all of the Career and Education Inventory outside of meeting with the SEE specialist. In these cases the SEE specialist and the client should still review the information together to assure they have a mutual understanding of the information as well as the person's career goals and preferences.

Copies of each client's Career and Education Inventory will be sent to the SEE national consultants, who will review them for completeness of the assessment process. The SEE contact sheet contains client status updates that include check boxes to indicate when the SEE specialist and the client have completed the SEE orientation process and a separate check box to indicate when the SEE specialist and the client have completed the Career and Education Inventory. The formula for assessing this item is to review Career and Education Inventories for the past six months to determine:

$$\frac{\text{Total \# of SEE clients who have a Career and Education Inventory completed within one month after SEE orientation}}{\text{Total number of \# SEE Clients who have completed SEE Orientation}}$$

5. <u>Respect for Personal Preferences</u>

While participating in SEE services, clients' choices regarding pursuing employment and /or education goals are honored and followed. Likewise, clients have choices or preferences regarding the job and /or school search process. Some clients may express a preference for making contacts with perspective employers or educators by themselves. Other clients may decide to use "disclosure" and give permission for the SEE specialist to have contacts with potential employers and/or educators on behalf of the client. When a client states the choice of having initial employer and educator contacts (during the placement process) made by the SEE specialist, then the client is requesting direct interventions from the SEE specialist. . Or clients may choose to use behind the scenes supports from their SEE specialist while the client has all the contact with potential educators or employers. Clients may change their mind about this preference frequently. Some clients will find a good job or school match without giving permission for disclosure and then may change their mind about disclosure in order to benefit from SEE contact with a supervisor or an instructor

In a similar fashion, clients also have the opportunity to develop and identify their personal preferences regarding how the SEE specialist will work with them during follow-.along supports for clients in school or who are employed.

SEE specialists document and respect client preferences regarding the school and job search and placement process as well as during follow-along supports for school and work.

The data for respecting personal preferences are gathered from the SEE contact sheets. When clients are in the search and placement process, or in the follow-along supports process, discussions about disclosure preferences are recorded on the contact sheet. Whenever a client chooses to ask an SEE specialist to be directly involved in the job or school search process by activating the option of "disclosure", then the client is implicitly requesting active, in person interventions on behalf of the SEE specialist with employers and educators. The same is true in the follow along supports stage too.

When a client requests the use of disclosure, then, the services provided by the SEE specialist are reviewed to assess how well they honor the documented client preferences. For example, if the client decides to request that the SEE specialist contact school personnel on his or her behalf then are the services provided by the SEE specialist respecting that preference? In this case, has the SEE specialist made in person contact with educators on a monthly basis (at a minimum) during the school placement phase?

The data for assessing this item are gathered from the most recent six months using this formula to determine the percentage:

$$\frac{\text{\# SEE clients who request in person interventions in the school or job search or placement phase from the SEE Specialist (i.e. using disclosure); for whom in person school or job search contacts have been provided on their behalf by SEE specialist on a monthly basis (at a minimum)}}{\text{\# SEE clients who request in person interventions in the school or job search or placement phase from the SEE Specialist (i.e. using disclosure)}}$$

6. Benefits Counseling

One of the most complex and sometimes confusing challenges that may confront clients who are interested in achieving their career goals in education and employment is the question about what to do about disability benefits. For clients and family members alike, this is a quandary that may have no clear or correct answer. The SEE specialist takes a lead role; with help from other NAVIGATE team members, in helping clients and families to access good accurate information about the array of disability income programs and public health programs. The goal is to help clients and family members to develop a plan of what role, if any, that disability benefits will have in helping clients to achieve their career goals and aspirations. In order to accomplish this, it is important for the NAVIGATE Director to work closely with the SEE specialist to identify resources that provide good benefits counseling. For the purposes of the NAVIGATE program, benefits counseling is defined as, helping individuals and their family members or other supporters (included with the permission of the client) to make their own decisions about what role, if any, the use of disability benefits will play in helping clients to achieve their career goals related to employment and education. This assistance includes providing clients with accurate and understandable information about the types of disability benefit programs that exist on federal, state and local levels, the eligibility and application processes for these programs, and information about work incentive programs and other options for people who receive benefits. This information is based on each individual client's unique circumstances and customized to their situation. Benefits counseling also helps clients to identify the pros and cons of the different choices that are available to them regarding multiple disability benefit programs.

For the purposes of the NAVIGATE program, benefits counseling is defined as, helping clients and their family members or other supporters (included with the permission of the client) to make their own decisions about what role, if any, the use of disability benefits will play in helping clients to achieve their career goals related to employment and education. This assistance includes providing clients with accurate information about the types of disability benefit programs that exist on federal, state and local levels, the eligibility and application processes for these programs, and information about work incentive programs and other options for people who receive benefits. This information is based on each individual client's unique circumstances and customized to their situation.

The SEE specialist and the NAVIGATE team should remember that it may be most useful for clients and family members, with the client's consent, to have joint meetings with the SEE specialist, the Family clinician, and the IRT practitioner to review and discuss perspectives on disability benefits in complicated situations.

The data for this item come from the SEE contact sheets that are completed whenever the SEE specialist has had contact with or on behalf of a client. The contact sheet also contains information regarding client status updates. In this section, the SEE specialist enters information about activities that have been completed by the client related to achievement of the person's education or employment goals. These activities are recorded even if the SEE specialist was not present with the client. One of the activities is client participation in benefits counseling. The information for this item is gathered over the past six months, using this formula:

$$\frac{\text{\# Clients who have participated in benefits counseling}}{\text{\# Clients in SEE who have completed SEE Orientation}}$$

7. <u>Rapid Job and School Search</u>

SEE specialists work with clients in a timely and responsive manner and help clients to have contact; either with the SEE specialist or without the SEE specialist present, with prospective school personnel or employers within one month after the client has identified a specific employment and/or education goal. For some clients, this contact may be with an employer for a job interview, whereas for other clients it may be an informational interview about a school program or a job. It is crucial that SEE services respond to clients in a rapid fashion to help keep motivation for work or school up, and to help clients assess those situations through in person meetings or interviews with potential employers or with potential educators.

The data for this item come from SEE contact sheets. When clients have developed a specific education or employment goal, then the SEE specialist notes this in the contact sheet. The SEE specialist works together with the client to make progress towards this goal in a timely fashion, while respecting the individual needs and circumstances of all clients. The formula for assessing rapid job search is derived by evaluating the number of days from when a client has identified a specific education or employment goal until the client has in person contact with a potential employer or educator as evidenced on the SEE contact sheet. The data for this item are gathered from the most recent six months and the formula for assessing this item is:

$$\frac{\text{Total \# of clients who have face-to-face contact with a potential employer or school personnel within one month of developing a specific education or employment goal}}{\text{Total \# SEE clients who have a specific education or employment goal}}$$

8. Follow-along Supports

SEE services help clients to attain jobs or enroll in educational programs and be successful with school and work. In order to maximize the chances for success at work and school, SEE specialists are responsible for providing in person follow-along supports that help clients with school or with work. These supports are designed to identify potential problems early on and then to respond rapidly to prevent problems from arising at work or school. Follow-along supports are provided to all clients in SEE regardless of their personal choices and decisions about disclosure on a monthly basis at a minimum. Follow-along supports for people who are in school or employed may be done outside of schools and work places, in client's residences, or in their communities.

The data for this item come from the SEE contact sheets. When the SEE specialist provides follow-along supports to clients who are in education programs or employed, those supports are document in the SEE contact sheets as well as the education or employment status of the client. The data for this item are gathered from the past six months and the formula for assessing this item is:

$$\frac{\text{\# Clients employed or in school that receive monthly follow along supports}}{\text{\# Clients who are employed or in school}}$$

9. Community-based Services

One significant difference between SEE services and other NAVIGATE services is the location of where services are provided. The SEE specialist has an obligation to work with people in a variety of different settings in their communities. The work done in the community by the client and the SEE specialist will be some of the most effective and crucial work to help clients achieve their career goals.

The SEE specialist should not be simply doing office-type work in the community, but instead the SEE specialist should be doing active community-based work directly with clients, potential employers, employers, potential educators and educators in person. Other important community based-tasks include working with the client to develop a career profile; at least one meeting for doing this work should be held at the client's residence.

It is vitally important that the SEE specialist works independently in the community being present in places of employment and places of education, sometimes with, and sometimes without clients being present. The SEE specialist is able to get a more accurate understanding of how the client interacts in school or in the workplace because the specialist is spending time with the client in these settings.

All SEE contacts with clients are recorded using the SEE contact sheet, which includes the locations of contacts as well as the purpose and who was present. The NAVIGATE Director is able to establish and monitor the frequency of SEE specialist contacts in the community on a regular basis. The data used for this item are gathered from the contact sheets for the past six months. The formula for determining the percentage of contacts the SEE specialist provides with or on behalf of clients in the community is:

$$\frac{\text{\# contacts by SEE specialist with or on behalf of the client in the community}}{\text{\# all contacts by SEE specialist with or on behalf of the client}}$$

NAVIGATE - Supported Employment and Education
Fidelity Scale

Item	1	2	3	4	5
1. Zero Exclusion: All NAVIGATE clients are offered participation in SEE at least once in person, within one month of starting NAVIGATE program	< 20% of clients meet with SEE specialist at least once in person, within one month of starting NAVIGATE program	< 40% of clients meet with SEE specialist at least once in person, within one month of starting NAVIGATE program	< 60% of clients meet with SEE specialist at least once in person, within one month of starting NAVIGATE program	< 80% of clients meet with SEE specialist at least once in person, within one month of starting NAVIGATE program	≥ 80% of clients meet with SEE specialist at least once in person, within one month of starting NAVIGATE program
2. SEE services integrated with all NAVIGATE Services: SEE specialist actively participates in NAVIGATE weekly team meetings and works to assure that all NAVIGATE services are working together to help people achieve their education and employment goals	<20% of time SEE specialist actively participates in NAVIGATE weekly team meetings and works to assure that all NAVIGATE services are working together to help people achieve their education and employment goals	<40% of time SEE specialist actively participates in NAVIGATE weekly team meetings and works to assure that all NAVIGATE services are working together to help people achieve their education and employment goals	<60% of time SEE specialist actively participates in NAVIGATE weekly team meetings and works to assure that all NAVIGATE services are working together to help people achieve their education and employment goals	<80% of time SEE specialist actively participates in NAVIGATE weekly team meetings and works to assure that all NAVIGATE services are working together to help people achieve their education and employment goals	≥80% of time SEE specialist actively participates in NAVIGATE weekly team meetings and works to assure that all NAVIGATE services are working together to help people achieve their education and employment goals
3A[1]. Focus on competitive employment Clients who are not yet employed, with a specific employment goal, have face-to-face contact with a potential employer consistent with their individual employment goals on a monthly basis at a minimum	<20% of clients who are not yet employed, with a specific employment goal, have face-to-face contact with a potential employer consistent with their individual employment goals on a monthly basis at a minimum	<40% of clients who are not yet employed, with a specific employment goal, have face-to-face contact with a potential employer consistent with their individual employment goals on a monthly basis at a minimum	<60% of clients who are not yet employed, with a specific employment goal, have face-to-face contact with a potential employer consistent with their individual employment goals on a monthly basis at a minimum	<80% of clients who are not yet employed, with a specific employment goal, have face-to-face contact with a potential employer consistent with their individual employment goals on a monthly basis at a minimum	≥80% of clients who are not yet employed, with a specific employment goal, have face-to-face contact with a potential employer consistent with their individual employment goals on a monthly basis at a minimum

Item	1	2	3	4	5
3B[1]. Focus on school in integrated settings: Clients who are not yet in an education program, with a specific education goal, have face-to-face contact with a potential educator or school personnel consistent with their individual education goals on a monthly basis at a minimum	<20% of clients who are not yet in an education program, with a specific education goal, have face-to-face contact with a potential educator or school personnel consistent with their individual education goals on a monthly basis at a minimum	<40% of clients who are not yet in an education program, with a specific education goal, have face-to-face contact with a potential educator or school personnel consistent with their individual education goals on a monthly basis at a minimum	<60% of clients who are not yet in an education program, with a specific education goal, have face-to-face contact with a potential educator or school personnel consistent with their individual education goals on a monthly basis at a minimum	<80% of clients who are not yet in an education program, with a specific education goal, have face-to-face contact with a potential educator or school personnel consistent with their individual education goals on a monthly basis at a minimum	≥80% of clients who are not yet in an education program, with a specific education goal, have face-to-face contact with a potential educator or school personnel consistent with their individual education goals on a monthly basis at a minimum
4. Comprehensive Assessment: SEE specialists and clients complete a Career and Education Inventory to help clients and the NAVIGATE team to identify the person's strengths, interests, preferences and education or employment goals within one month of completing SEE orientation	< 20 % of clients have a completed Career and Education Inventory identifying strengths, interests, preferences and goals within one month of completing SEE orientation	< 40 % of clients have a completed Career and Education Inventory identifying strengths, interests, preferences and goals within one month of completing SEE orientation	< 60 % of clients have a completed Career and Education Inventory identifying strengths, interests, preferences and goals within one month of completing SEE orientation	< 80 % of clients have a completed Career and Education Inventory identifying strengths, interests, preferences and goals within one month of completing SEE orientation	≥ 80 % of clients have a completed Career and Education Inventory identifying strengths, interests, preferences and goals within one month of completing SEE orientation
5. Respecting Clients' Personal Preferences: SEE specialists and clients discuss pros and cons and client choices regarding SEE specialist having direct contact (*disclosure*) with employers or school personnel. Client's choices are flexible, documented and SEE services are provided consistent with those choices.	< 20 % of clients discuss their personal preferences regarding disclosure with SEE specialist. Their choices are documented and flexible. SEE services are provided consistent with those choices	< 40 % of clients discuss their personal preferences regarding disclosure with SEE specialist. Their choices are documented and flexible. SEE services are provided consistent with those choices	< 60 % of clients discuss their personal preferences regarding disclosure with SEE specialist. Their choices are documented and flexible. SEE services are provided consistent with those choices	< 80 % of clients discuss their personal preferences regarding disclosure with SEE specialist. Their choices are documented and flexible. SEE services are provided consistent with those choices	≥ 80 % of clients discuss their personal preferences regarding disclosure with SEE specialist. Their choices are documented and flexible. SEE services are provided consistent with those choices

Item	1	2	3	4	5
6. Benefits Counseling: Clients receive benefits counseling to have their questions answered and determine role of benefits in work or school	<20% of clients receive benefits counseling to have their questions answered and determine role of benefits in work or school	<40% of clients receive benefits counseling to have their questions answered and determine role of benefits in work or school	<60% of clients receive benefits counseling to have their questions answered and determine role of benefits in work or school	<80% of clients receive benefits counseling to have their questions answered and determine role of benefits in work or school	≥80% of clients receive benefits counseling to have their questions answered and determine role of benefits in work or school
7. Rapid job and school search: Clients have face-to-face contact with a potential employer or school personnel within one month after developing a specific education or employment goal	<20% of clients have face-to-face contact with a potential employer or school personnel within one month after developing a specific education or employment goal	<40% of clients have face-to-face contact with a potential employer or school personnel within one month after developing a specific education or employment goal	<60% of clients have face-to-face contact with a potential employer or school personnel within one month after developing a specific education or employment goal	<80% of clients have face-to-face contact with a potential employer or school personnel within one month after developing a specific education or employment goal	≥80% of clients have face-to-face contact with a potential employer or school personnel within one month after developing a specific education or employment goal
8. Follow Along Supports: Clients who are employed or in school receive planned and regular in person follow along supports provided by SEE specialist on a monthly basis at a minimum	<20% of clients who are employed or in school receive planned and regular in person follow along supports provided by SEE specialist on a monthly basis at a minimum	<40% of clients who are employed or in school receive planned and regular in person follow along supports provided by SEE specialist on a monthly basis at a minimum	<60% of clients who are employed or in school receive planned and regular in person follow along supports provided by SEE specialist on a monthly basis at a minimum	<80% of clients who are employed or in school receive planned and regular in person follow along supports provided by SEE specialist on a monthly basis at a minimum	≥80% of clients who are employed or in school receive planned and regular in person follow along supports provided by SEE specialist on a monthly basis at a minimum
9. Community Based Services: SEE contacts are provided to clients, employers and educators in the community rather than in the office	<30% of SEE contacts are provided to clients, employers and educators in the community rather than in the office	<40% of SEE contacts are provided to clients, employers and educators in the community rather than in the office	<50% of SEE contacts are provided to clients, employers and educators in the community rather than in the office	<60% of SEE contacts are provided to clients, employers and educators in the community rather than in the office	≥60% of SEE contacts are provided to clients, employers and educators in the community rather than in the office

[1]Items 3A and 3B are calculated separately first assessing all clients working on employment goals and then clients working on education goals. These items are then averaged together to produce on score.