Overview: This guide provides the following information:

1. When the service may be authorized.
2. Criteria for a Service Coordinator (SC) or Personal Agent (PA) to authorize the service.
3. Criteria for a SC or PA to approve or deny payment for Discovery.
4. Defines and explains the stages of Discovery, which with the exception of the Pre-Discovery Referral Checklist, are mandatory:
   a. The Profile Document
   b. Progress Notes
5. Requires ODDS Discovery Providers to be on the ODDS Discovery Providers List.
6. Answers to Frequently Asked Questions

Criteria Requirements for Authorizing Discovery

To be eligible for the service, a person must know that they want Competitive Integrated Employment. Before he Service Coordinator/Personal Agent (SC/PA) can authorize the service, the person and their employment team must determine that the person wants and needs Discovery.

When documenting this conversation, the SC/PA must also document that the team sought and reviewed other materials. Examples include but are not limited to: the Summary of Performance; Individual Plan for Employment; and progress notes from other services such as Small Group Employment or Employment Path Services. The review’s purpose is to determine if Discovery would be complimentary or duplicative.

Although its use is not required, the Pre-Discovery Referral Checklist is one way to meet this documentation requirement. A SC/PA, working with the employment team, completes this checklist which guides the team through the factors to determine if Discovery is a good use of the person’s time.

Discovery is not a required pre-requisite to getting a job, it is a resource people may choose to access. As outlined above, it is only requested when a person chooses to access it. The person and the team must be aware that Discovery will delay the commencement of job development. Discovery must not be considered a mandatory part of a provider’s service delivery model.

Reasons that a person might choose Discovery include, but are not limited to:
- A desire to work, but not being sure about employment interests
- The person wants to change career paths
- Questions around the type of support needed to be successful in a community job
- Limited or no work experience
Criteria Requirements for Discovery to be approved for Payment:

Unless the person chooses otherwise, the PA/SC will share pertinent information with the Discovery Provider via the ISP and Career Development Plan. To be considered for the Discovery payment, all of the following criteria must be met:

1. **Required Documentation:** All of the required documentation must be submitted at the appropriate time(s). The SC/PA must deem that the Profile meets the evaluation criteria for each Phase. If the team required additional documents/tools in addition to the mandated forms, they must be submitted prior to the SC/PA authorizing payment. ¹The ODDS mandated Discovery forms are: the Profile document and progress notes.

2. **The Home Visit:** Unless the person does not want a visit to occur at their home, at least one visit to the person’s home. Visits or activities done at a person’s home are not considered Community Employment-Related Experiences, except for the one exception under the “Community Exploration” section of the Profile. Please note, if the person does not want to meet at their home, the provider must document the reason(s) for that in this section. In this instance, the person must have at least four Direct Employment Experiences. Refer to the Experiential Components of Discovery Workers Guide for the definitions of Community Employment-Related Experiences, Direct Employment Experiences, and The Home Visit.

3. **Interviews with Supporters:** with at least three people who know the person well. These visits as well as the sharing of info by the SC/PA must be outlined in the Service Agreement. Refer to the Experiential Components of Discovery Workers Guide for detail on Interviews with Supporters.

4. **Community Employment-Related Experiences:** The following three types of experiences belong to this category:
   
   a. **Community Exploration/Observation Activities:** One must be a familiar activity and the other must be an unfamiliar activity. Both must be tailored to the person. At least two are required, four are permitted. Regardless if more than two are performed, only one may be in the person’s home.
   
   b. **Direct Employment Experiences:** Occur at an employer site and are focused on the person trying out job duties and tasks. A minimum of three are required.
   
   c. **Informational Interviews/Job Shadows:** Occur at an employer site and are focused on the person learning more about a particular job and/or industry. No minimum.

   The remaining experience may be fulfilled by a Community Exploration/Observation Activity, Direct Employment Experience or Informational Interview/Job Shadow. Refer to the Experiential Components of Discovery Workers Guide for additional details on Community Employment-Related Experiences.

5. **Career Themes:** Each profile must include at least two Career Themes. Three to four themes is optimal. To develop these themes there must be at least six Community Employment-Related Experiences. Refer to the Experiential Components of Discovery Workers Guide for the definition of Career Themes.

¹These requirements also pertain to providers who have alternative profiles that ODDS has approved. Alternative profiles may be used until TBD. See details under “Discovery Profile Document,” in this guide for more information.
6. **Employer Names:** As many potential employer names as possible for each theme. Employers must be organizations that the person can reasonably be expected to travel to on a daily basis.

7. The Profile is created in a narrative that makes all the following obvious:

   a. That the person’s interests, skills and abilities were the basis for the service.
   b. Why the time in Discovery was used the way it was. Additionally, the profile or the progress notes must document how many hours each experience lasted.
   c. How conclusions and recommendations were made.
   d. The person and the team discovered elements of what works and what does not – with an emphasis on new things.
   e. The person’s employment interests.
   f. What the next steps are for:
      i. The person
      ii. The Job Developer
      iii. Others whose support is essential for the person to be successfully employed.

The Discovery Profile cannot result in a conclusion that the person cannot work. Discovery’s purpose is to discover a person’s strengths, skills and preferences in relation to competitive, integrated employment. When people require accommodations or supports to work, the profile must outline these needs. The expected outcome of Discovery is making progress on a person’s goal of achieving competitive integrated employment. If a provider concludes that the person can’t work, the profile will be returned without payment. The Discovery provider will meet with ODDS to discuss how they arrived at this determination. The discussion will be the basis for remedial action.

A provider cannot use Discovery as a screening tool to determine if they are capable of successful job development. It should be extremely rare when the Discovery provider is not also prepared to provide job development. If a pattern is observed of a provider delivering Discovery but not job development, ODDS may review the pattern, discuss with the provider and others as necessary before determining, what if any remedial action to take.

Future rule will clarify that if a provider delivers a Discovery service they must deliver the Job Development unless the individual no longer wants to work with that agency or an involuntary exit notice is given to the individual indicating that the provider cannot support them as outlined in rule. This notice does entitle an individual to hearing rights. If a pattern is observed of a provider delivering Discovery but not job development, ODDS may review the pattern, discuss with the provider and others as necessary before determining, what if any remedial action to take. With future rulemaking, Discovery may not be a stand-alone service.

**Definitions & Purposes**

**The Pre-Discovery Referral Checklist:** While this form is not required, its use is recommended to fulfill the documentation requirement concerning how it was determined that the person wanted and needed Discovery. This is also a crucial time to understand how job development will be provided. Led by the SC/PA, the employment team uses this checklist to ensure that Discovery:

1. Is appropriate for the person’s immediate goals; and
2. Does not duplicate experiences that the person has already had; and
3. Builds upon and compliments pertinent information from experiences such as school, Vocational Rehabilitation, community jobs and other employment services the person has participated in.
The Discovery Strategic Plan: A plan developed and agreed upon by the person and their employment team. The plan is an opportunity for the person and the team to collaborate, including identifying places for community employment-related experience. For example, team members may have connections at local businesses that interest the person. The provider must submit the plan, which also serves as a report on the status of the service, to the PA/SC no later than thirty business days after the person begins participating in the service. At a minimum, the plan must do all of the following:

1. Articulate the activities and timeframes for accomplishing each, including but not limited to:

   a. Community-Employment Related Experiences: These include: Community Exploration/Observation Activities, Direct Employment Experiences and Informational Interviews/Job Shadows. The provider must give as much detail as possible. While including the specific names of places where experiences will occur is preferred, it is not required. The provider must explain purpose of each experience and what the person and the team expect to be the particular benefit of each experience.

   b. Interviews with Supporters: A list of family and friends to be interviewed with a brief description of why each person will be interviewed.

   c. The Home Visit: Documents a date and time for the visit.

2. Specifies the timelines and roles for involving other systemic partners including but not limited to Vocational Rehabilitation (VR) and the schools. If other systemic partners such as VR will not be involved, the reason(s) for this must be explained. This also pertains to school for students who are still in school through IDEA. The PA/SC needs to make the referral to VR when Discovery is authorized. At the latest, the SC/PA should make the VR referral no later than 30 days after the person begins Discovery.

3. Include any other activities that the person and the employment team have agreed on.

4. Respect any considerations necessary for success. For example, if the person has a low tolerance for heat or other environmental factors, experiences must not occur in such places.

The purpose of the service is to explain in a narrative what was learned from experiences and interviews conducted during Discovery. The profile must be sufficiently detailed so that a person who was not involved can understand what the person did during the service as well as what led to the development and implementation of post Discovery steps. All Discovery documents belong to the person. The provider must write the profile so that it provides insight to the person and their supporters regarding employment-related matters. This will allow the person to build on rather than duplicate experiences.

As of TBD, all providers must use the official ODDS Discovery Profile. Profiles begun prior to this date that are incomplete as of this date, may be completed using the provider’s approved alternative profile. As of the date of this transmittal, ODDS will no longer approve alternative profiles. Until TBD, providers who have ODDS approval to use alternative profiles, must also use the ODDS Discovery Strategic Plan and Executive Summary. Such providers must also adhere to the instructions regarding progress notes outlined in this Worker’s Guide.

Progress Notes: Progress notes are the substantiating documentation for the observations and
recommendations in the Profile Document. While the Profile offers a rich narrative describing the experiences, progress notes include details such as the dates and times of the community experiences, meetings, including c. Progress notes must be made available upon request. Please note that the provider may opt to include this level of detail in the profile instead of separate progress notes.

**Discovery Executive Summary:** The provider creates this after Discovery is complete. It is a succinct overview that allows the reader to understand what was learned in Discovery. It also provides recommendations and next steps. The last part of this document is for the person and their SC/PA to indicate their agreement/disagreement with the Executive Summary. Additionally, SC/PA’s will use this document to indicate their approval or denial of payment the completed service. The SC/PA may include comments and/or recommendations.

**Training Plan:**

Dates for training sessions will be forthcoming

**Frequently Asked Questions:**

1. What happens when a person decides not to pursue employment?
   
   a. The provider must document how they made substantial efforts in helping the person to address their concerns.
   b. Use a change form to amend the ISP – this needs to be done even if the person wants to explore employment and continues to have a CDP.
   c. Recommend technical assistance if the provider has a pattern of people choosing not to pursue employment after Discovery. In these situations, the CDDP/Brokerage will contact the ODDS Regional Employment Professional. There will be discussion to decide the course of action.

2. What happens if the service and/or profile is not finished due to circumstances such as illness, emergency, etc.?

   The profile will be put on hold until when/if the person wants to resume the service. Payment will not be made until the service and/or profile is completed. In the upcoming Discovery rate there is a differential included for this.

3. What services other than Discovery could be considered if the person has a weak commitment to employment?

   Options for other employment services, include but are not limited to:

   a. VR-funded Career Exploration: Can be provided to someone who is undecided about working. Career Exploration results in three vocational themes. Career Exploration documents vary in length and the payment amount is negotiated by the provider and VR prior to the service.

   b. ODDS Funded Employment Path Community can be structured so that a person who is undecided can explore employment options in the community as well as using this time to address any employment-related questions or concerns.

   c. Please note, these service recommendations should not result in a self-referral. It is fine to note that someone can benefit from additional service. However, it should not be specific to
4. What happens if the person who is proposed to provide Discovery does not also provide job development (regardless if funder would be VR or ODDS)?

The Discovery Plan would outline how and who would provide job development. This discussion must happen prior to the Service Agreement being signed unless the change has happened as a result of an emergency or the person selecting a different job development provider. If a provider has a pattern of emergencies or people changing their mind, the CDDP/Brokerage will contact the ODDS Regional Employment Professional to discuss the situation. After a discussion with the provider, the ODDS Regional Employment Professional may recommend the provision of technical assistance and/or remedial action.

5. Is it acceptable practice if a provider offers the same or very similar experiences to people who receive Discovery?

This is an indicator that the provider is not proficient in delivering the service and does not understand its purpose. If a pattern is observed, the provider may be required to make arrangements to attend additional prescribed training and/or technical assistance.

**ODDS Discovery Provider List:** All Discovery providers will request to be on the ODDS Discovery Provider’s List by sending an email with the subject line, “Request to be on Discovery Provider List,” to ODDS.CareerDevelopmentPlan@state.or.us. If an organization is currently on the list, this requirement has been met. However, it is recommended that you keep your information up to date.

**Applicability:** Service Coordinators and Personal Agents will use this policy to approve or deny profiles. Providers will use this to adhere to the minimum requirements of this service.

**Form(s) that apply:** Pre-Discovery Referral Checklist, Profile

**Contact(s):** Name: Julie Huber; Phone: (503) 945-9787; Email: julie.l.huber@state.or.us