Developmental Disabilities
Workers Guide

Office of Developmental
Disability Services

Topic:	Draft Discovery Guidelines for Service Coordinators/ Personal Agents and Discovery Providers
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Overview: This guide provides the following information:

1. The Use of the ODDS Discovery Profile
2. Training Requirements
3. Discovery is Never Required
4. Who is Eligible for Discovery
5. Criteria for a SC/PA to Authorize the Service
6. Discovery's Time Frame
7. Definitions and Purposes
8. Criteria for a SC or PA to Approve or Deny payment
9. Answers to Frequently Asked Questions

The ODDS Discovery Profile

All Discovery Profiles authorized on or after September 1, 2021, must be completed using the new ODDS Discovery Profile and corresponding policy. In the past, ODDS issued letters to providers approving them to use alternative profiles. At this time, ODDS will not approve new alternative profiles. For profiles authorized on or after September 1, 2021, the ODDS Discovery Profile is the only profile that may be used.

Training Requirements

Any Provider or Independent Contractor[1] that is eligible to provide Discovery must meet the training, core competency, and credentialing requirements in OAR 411-345. All Discovery providers must be VR vendors with a current VR job placement contract. Specifically, current training for Discovery includes at least one training for which the training topic/curriculum should directly relate to conducting and documenting, through the use of developing a Discovery Profile, the Discovery process. These trainings are in the Department-Approved Trainings List.

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[1] For brevity's sake, the term "providers" shall be used in this guide to refer to providers and Independent Contractors.

Additionally, providers and their staff who deliver any part of Discovery on or after September 1, 2021[2] must have taken and passed these four modules and meet all Discovery training requirements.[3]

Introduction to Discovery:
https://wd5.myworkday.com/oregon/learning/course/b30ac51758cf0196ab9066741a0106e4?type=9882927d138b100019b928e75843018d&record=fa840cd09f8901d3bd3318f21a010edd

Community Based Experiences:
https://wd5.myworkday.com/oregon/learning/course/b30ac51758cf014f26275d1b1b0165eb?type=9882927d138b100019b928e75843018d

Approval Criteria:
https://wd5.myworkday.com/oregon/learning/course/fa840cd09f89010410a60d221c0171ea?type=9882927d138b100019b928e75843018d

Career Development Plan and Individual Plan for Employment:
https://wd5.myworkday.com/oregon/learning/course/b30ac51758cf017adadf614d1c01bbfa?type=9882927d138b100019b928e75843018d

Because the modules focus on the requirements of Discovery, ODDS strongly encourages SCs/PAs to take and pass these modules. However, Module 3: Approval Criteria and Module 4: Career Development Plan and Individual Plan for Employment may be the most beneficial modules for SCs/PAs, if limited training time is available.

Discovery is Never Required

Discovery is a person's choice. No one may ever require Discovery. It is never a required pre-cursor to any other ODDS or VR service. It is never a required pre-requisite to getting a job. It is not an assessment or a test. Rather, it is an option for people who want CIE but have limited experience or are unsure of what type of work they are interested in. The SC/PA must inform the person and the team that Discovery will delay the start of job development.

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[2] It should be rare when more than one individual delivers Discovery to a person.

[3] See the Workers Guide: Employment Professional Qualifications and Training for information on training requirements and continuing education credits.

Discovery must not be a mandatory part of a provider's service delivery model. Providers cannot use it to determine if they are sufficiently skilled to job develop for a person. 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.

Who is Eligible for Discovery

A person must be actively seeking Competitive Integrated Employment (CIE). 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 is working in CIE but wants to change career paths
- There are questions around the type of support needed to be successful in a community job
- The person has limited or no work experience

Criteria for a SC/PA to Authorize Discovery

Before the SC/PA can authorize Discovery, the person and their employment team must determine that the person wants and needs Discovery. This is called the Pre-Discovery Referral Process. The SC/PA must document this process and include the documentation in the person's file at the CDDP or Brokerage.

Although its use is not required, The Pre-Discovery Referral Checklist is one way to meet this documentation requirement. The 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. If the SC/PA does not use the checklist, they must document how the team addressed and met the checklist's elements.

Prior to initiating this discussion, the person and their SC/PA must discuss who to invite. The person does not have to select a Discovery provider[4] before or during the Pre-Discovery Referral Process.[5] Participation by partners such as VR, and if applicable, the school, greatly enhances the value of this discussion.Because the purpose of the Profile is to inform job development, VR involvement that includes the Pre-Discovery Referral Process is key to ensuring that the person gets the maximum benefit from Discovery.[6]

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[4]The OSAC Guide to Community Employment has tools to help people select employment providers.

[5] The SC/PA must give a copy of the completed checklist to the Discovery provider. If the SC/PA opted to use a method of documentation other than the checklist, they must share that document with the provider.

[6] The SC/PA must document the VR referral and the sharing of the Profile with VR in the Career Development Plan.

The SC/PA must document which team members were involved in the discussion and what materials the team sought and reviewed. 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. Led by the SC/PA, this process determines if Discovery:

1. Is appropriate for the person's immediate goals; and

2. Would build on and compliment, rather than duplicate, pertinent information from experiences such as school, VR, community jobs and other employment services.

This process yields information about the person's likes, dislikes and past experiences. While this information shapes Discovery, it is also important when a person decides not to access Discovery. This information can play a valuable role in the development and/or refinement of the person's CDP outcomes and implementation strategies/action plans.

Discovery's Timeframe

Discovery providers must complete the service in three months. However, the SC/PA may consider a request for a three-month extension (bringing the total to six months). If the SC/PA grants an extension, the SC/PA must document the reason in the individual's file.

Definitions & Purposes

Discovery Agenda: The provider develops this plan, which serves as Discovery's implementation strategy/action plan. The Agenda is an opportunity for the person and the team to collaborate, including identifying places for community employment-related experiences. For example, team members may have connections at local businesses that interest the person. The provider must submit the Agenda, 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. If the provider is not able to meet this deadline, the SC/PA may, at their discretion, grant or deny an extension. At a minimum, the Agenda must do all the following:

1. Articulate the activities and timeframes for accomplishing each activity, 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 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.

5. Specifies who will be delivering the service and lists their credentials. Anyone who delivers any part of Discovery must have met all Discovery training requirements. If there is any change in who will be delivering all or part of Discovery, the provider must update the Agenda and send it to the SC/PA. The person and the SC/PA will approve or deny the change in Discovery staff. Upon approval, the new staff can deliver the service.[7] It should be rare when more than one person delivers the service.

Discovery Profile: The profile consists of the profile form, which includes the Agenda and the Executive Summary. As outlined earlier, the provider may opt to include required details in progress notes rather than the profile. In this circumstance, those progress notes are part of the Profile. The Profile also consists of any other tools or

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[7] An exception will be made if the employment professional has an emergency on the day of a community-related employment experience.

documents the team has agreed on. The profile is a narrative that is sufficiently detailed so that someone who was not involved in Discovery can understand what the person did in the service as well as what led to the development of the experiences, career themes and post Discovery steps. All Discovery documents belong to the person. The person must have a copy of their completed Profile.

Progress Notes: 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 when/how the experiences were organized and scheduled. The provider may opt to include this level of detail in the profile instead of separate progress notes. Upon request of the person and/or the SC/PA, the provider must send the progress notes to the SC/PA and/or person or any other entity.

Discovery Executive Summary: The provider creates this after Discovery is complete. It allows the reader to understand what was learned in Discovery. It also provides recommendations and next steps. On the Summary, the person and their SC/PA indicate their agreement/disagreement with the Profile. Additionally, SC/PA's will use the Summary to indicate their approval or denial of payment the completed service.

Criteria for a SC or PA to Approve or Deny Payment

Below is a brief overview of Discovery's requirements. While the profile as well this workers guide and the [Workers Guide: The Experiential Components of Discovery](#) outline the minimum expectations, the team can require additional experiences or information. To be considered for the Discovery payment, at minimum, all the following criteria must be met:

1. *The Pre-Referral Discovery Process:* As outlined previously, this documented process must occur prior to authorization and service delivery. Although this is the SC/PA's responsibility, it ensures that all eligibility requirements were met.

2. *The Agenda:* The provider must send the completed agenda to the SC/PA for approval no later than 30 days after the service begins. If the provider is not able to meet this deadline, the SC/PA may, at their discretion, grant or deny an extension. If, while delivering the service, the provider makes a significant change to the agenda, the provider must send the SC/PA an updated agenda for their review and approval. The SC/PA determines if a change is significant. As noted previously, any change in the staff providing Discovery is a significant change.

3. ***All Criteria on the ODDS Discovery Profile are Met:*** Each phase of the Profile begins with evaluation criteria of that phase.

4. The Profile is a narrative that makes all the following obvious:

   a. That the person's interests, skills and abilities were Discovery's foundation.
   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 the person, the job developer, and others whose support is essential for the person to be successfully employed.

5. ***Evaluation Criteria on the Profile Form:*** All minimum standards must be met.

6. ***Required Documentation:*** The provider must submit all required documentation at the appropriate time. If the team required additional documents/tools/activities in addition to the ODDS mandated ones, they must be accomplished, and documentation submitted prior to the SC/PA authorizing payment. [8]

A Profile cannot result in a conclusion that the person cannot work. Such Profiles are not eligible for payment. ODDS is available for technical assistance upon request.

Frequently Asked Questions:

1. **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 current Discovery rate there is a differential included for this.

2. **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

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[8] These requirements also pertain to providers who have alternative profiles that ODDS has approved. Alternative profiles may be used until September 1, 2021. See details under "The ODDS Discovery Profile," in this guide for more information.

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 can explore employment options in the community as well as using this time to address any employment-related questions or concerns.

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 the provider.

3. **What happens if the person who is proposed to provide Discovery does not plan on also providing job development (regardless if funder is VR or ODDS)?**

All Discovery providers must be qualified VR vendors with a contract for job placement service. The job development discussion must happen prior to the SC/PA authorizing Discovery 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 Specialist will recommend next steps.

4. **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 CDDP/Brokerage will contact the ODDS Regional Employment Specialist to discuss the situation. After a discussion with the provider, the ODDS Regional Employment Specialist will recommend next steps.

Applicability: SC/PAs 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: Discovery Profile, Pre-Discovery Referral Checklist

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