

# MILESTONE PAYMENT SYSTEM OVERVIEW

Draft Proposal

# SUPPORTED EMPLOYMENT PROPOSED MILESTONES PERCENTAGE & RATES

- Current average cost is approximately \$6,300 (based on average over 3 years under authorization payments).
- Two rate proposals being considered
  - \$7,000
  - \$8,000
- Current successful outcome rate/ percentage being considered is 20-25% of total payment.

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# SUPPORTED EMPLOYMENT PROPOSED MILESTONES

## Proposal # 1

Milestone 1 - Intake

Milestone 2 - Supplemental evaluation

Milestone 3 - Development/ Retention

Milestone 4 - Training and Stabilization

Milestone 5 - Closure

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# MILESTONE # 1 - INTAKE

Supported Employment Milestone	Service Definition	CRP Documentation Required	VR Documentation	Payment %	Amount
1. Intake	Coordinate intake meeting once consumer is accepted into the program with VR, consumer and primary support persons (as determined appropriate) to determine goals, stated interests, evaluation/work availability.	<ol style="list-style-type: none"> <li>1. A vocational profile</li> <li>2. Initial CRP Service Plan</li> </ol>	<ol style="list-style-type: none"> <li>1. Referral packet which may include: IPE (Amended IPE, if applicable), WRAP, Eligibility Decision W/ MSD Documentation., Specialist Data (Medical and/or Psychological reports), Work &amp; Education History; Guardianship status</li> <li>2. Milestone Payment # 1 Authorization</li> </ol>	5%	\$ 400.00

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# MILESTONE # 2 – SUPPLEMENTAL EVALUATION

Supported Employment Milestone	Service Definition	CRP Documentation Required	VR Documentation	Payment %	Amount
2. Supplemental evaluation	<p>Observation of client in real or simulated work setting. The number and types of job sites to be agreed upon by the counselor and consumer. This may include time spent analyzing information relevant to a client's employment potential. The following, when done for supplemental evaluation purposes, can be included: reviewing client records, client interview, vocationally relevant communication with parents/guardians, VR or other involved agencies. Assessments must meet DOL guidelines. Must answer all VR counselor questions, identify type of work possible job prospects and amount and types of support needed to obtain and keep the job.</p>	<ol style="list-style-type: none"> <li>Narrative report including background information of consumer, the process of the assessment, observations, answers to all DVRS questions, and specific recommendations with provider signature.</li> <li>If supplemental evaluation will take longer than four weeks, a monthly summary is required.</li> <li>Updated CRP Service Plan with job development plan</li> </ol>	<ol style="list-style-type: none"> <li>RC questions to be answer by CRP for Evaluation</li> <li>Milestone Payment #2 Authorization</li> </ol>	10%	\$ 800.00

# MILESTONE # 3 – DEVELOPMENT/ RETENTION

Supported Employment Milestone	Service Definition	CRP Documentation Required	VR Documentation	Payment %	Amount
3. Development/ Retention (3 days on the job)	<p>Client specific job development and placement and time spent analyzing information relevant to a client's job development/ placement is included here.</p> <p><u>Job development:</u> Locating jobs for people with disabilities through networking with employers, businesses and community leaders*</p> <p><u>Job Placement:</u> Securing a position that matches the skills, abilities, motivation, interests, needs, and goals of the individual to insure the greatest chance of success on the job</p> <p>Once the individual has been hired and maintained employment for three days in a position that matches the vocational objective in the Individual Plan for Employment or otherwise agreed upon by counselor and consumer, the program is eligible for payment.</p>	<ol style="list-style-type: none"> <li>1. Monthly Summary reports during Job Development</li> <li>2. Job placement summary and indication of VR approval of placement match</li> <li>3. JD Milestone request form</li> <li>4. Case service Invoice</li> <li>5. Task Analysis</li> <li>6. Updated CRP Service plan with initial Intensive Training Plan</li> <li>7. New Hire Form</li> </ol>	<ol style="list-style-type: none"> <li>1. Milestone Payment # 3 Authorization</li> </ol>	40%	\$3,200.00

# MILESTONE # 4 – TRAINING AND STABILIZATION

Supported Employment Milestone	Service Definition	CRP Documentation Required	VR Documentation	Payment %	Amount
4. Training and Stabilization	In order for the client to be successful on the job, Intensive Training must occur. This includes one-on-one training with the job coach on the job site. It may also include employment advocacy time, non-employment advocacy time, and community resource training. Supported Employment must include fading and the process of stabilization. This is all guided by the task analysis with daily ratings, training plan and the progress the client makes on the job.	<ol style="list-style-type: none"> <li>1. Updated CRP Service Plan with complete Intensive Training Plan</li> <li>2. Monthly Summary indicating the progress of the consumer and the impact made by the job coach</li> <li>3. Task Analysis with daily ratings</li> <li>4. Payment Request Form (include dates for VR approval of beginning and end of stabilization)</li> <li>5. Extended Services Plan</li> </ol>	<ol style="list-style-type: none"> <li>1. Milestone Payment #4 Authorization</li> </ol>	20%	\$ 1,600.00

# MILESTONE # 5 – CLOSURE

Supported Employment Milestone	Service Definition	CRP Documentation Required	VR Documentation	Payment %	Amount
5. Closure	Payment will be made when rehab counselor has successfully closed the case and when the supported employment provider has submitted all required documentation. The client must have worked at least 90 days after stabilization ends and received adequate training and support after hire. Extended services must include at the minimum two on the job site support contacts per month unless otherwise indicated on the IPE.	<ol style="list-style-type: none"> <li>1. 30/60/90 day Consumer and Employer Form</li> <li>2. 26 payment request form</li> <li>3. Case service invoice</li> </ol>	<ol style="list-style-type: none"> <li>1. Milestone Payment #5 Authorization</li> <li>2. Closure statement upon 26 of case</li> </ol>	25%	\$ 2,000.00
				100%	\$ 8,000.00



# SUPPORTED EMPLOYMENT PROPOSED MILESTONES PERCENTAGE & RATES

## Proposal # 1

1	Intake	5%	\$ 400.00	5%	\$ 350.00
2	Supplemental evaluation	10%	\$ 800.00	10%	\$ 700.00
3	Development/ Retention	40%	\$ 3,200.00	40%	\$ 2,800.00
4	Training and Stabilization	20%	\$ 1,600.00	20%	\$ 1,400.00
5	Closure	25%	\$ 2,000.00	25%	\$ 1,750.00
		100%	\$ 8,000.00	100%	\$ 7,000.00

# SUPPORTED EMPLOYMENT PROPOSED MILESTONES

## Proposal #2

Milestone 1 – Intake

Milestone 2 – Supplemental evaluation

Milestone 3 – Job Development

Milestone 4 – Retention (3 days)

\*Reserved for cases where employment has been obtained at the time of referral to CRP through VR or client obtains their own job. When the CRP is involved in job development they will receive milestone 3 which will include payment for development and retention to be received after three days on the job.

Milestone 5 – Training and Stabilization

Milestone 6 – Closure

# MILESTONE # 1 - INTAKE

Supported Employment Milestone	Service Definition	VR Documentation	CRP Documentation Required	Payment %	Amount
1. Intake	Coordinate intake meeting once consumer is accepted into the program with VR, consumer and primary support persons (as determined appropriate) to determine goals, stated interests, evaluation/work availability.	<ol style="list-style-type: none"> <li>Referral packet which may include: IPE (Amended IPE, if applicable), WRAP, Eligibility Decision W/ MSD Documentation., Specialist Data (Medical and/or Psychological reports), Work &amp; Education History; Guardianship status</li> <li>Milestone Payment # 1 Authorization</li> </ol>	<ol style="list-style-type: none"> <li>A vocational profile</li> <li>Initial CRP Service Plan</li> </ol>	5%	\$ 400.00

# MILESTONE # 2 – SUPPLEMENTAL EVALUATION

Supported Employment Milestone	Service Definition	VR Documentation	CRP Documentation Required	Payment %	Amount
2. Supplemental evaluation	<p>Observation of client in real or simulated work setting. The number and types of job sites to be agreed upon by the counselor and consumer. This may include time spent analyzing information relevant to a client's employment potential. The following, when done for supplemental evaluation purposes, can be included: reviewing client records, client interview, vocationally relevant communication with parents/guardians, VR or other involved agencies. Assessments must meet DOL guidelines. Must answer all VR counselor questions, identify type of work possible job prospects and amount and types of support needed to obtain and keep the job.</p>	<ol style="list-style-type: none"> <li>1. RC questions to be answer by CRP for Evaluation</li> <li>2. Milestone Payment #2 Authorization</li> </ol>	<ol style="list-style-type: none"> <li>1. Narrative report including background information of consumer, the process of the assessment, observations, answers to all DVRS questions, and specific recommendations with provider signature.</li> <li>2. If supplemental evaluation will take longer than four weeks, a monthly summary is required.</li> <li>3. Updated CRP Service Plan with job development plan</li> </ol>	10%	\$ 800.00

# MILESTONE # 3 – JOB DEVELOPMENT

Supported Employment Milestone	Service Definition	VR Documentation	CRP Documentation Required	Payment %	Amount
3. Job Development	<p>Client specific job development and placement and time spent analyzing information relevant to a client's job development/ placement is included here.</p> <p><u>Job development:</u> Locating jobs for people with disabilities through networking with employers, businesses and community leaders*</p> <p><u>Job Placement:</u> Securing a position that matches the skills, abilities, motivation, interests, needs, and goals of the individual to insure the greatest chance of success on the job</p>	<ol style="list-style-type: none"> <li>Milestone Payment # 3 Authorization</li> </ol>	<ol style="list-style-type: none"> <li>Monthly Summary reports during Job Development</li> <li>Job placement summary and indication of VR approval of placement match</li> <li>JD Milestone request form</li> <li>Case service Invoice</li> <li>New Hire Form</li> </ol>	30%	\$ 2,400.00

# MILESTONE # 4 – RETENTION

Supported Employment Milestone	Service Definition	VR Documentation	CRP Documentation Required	Payment %	Amount
4. Retention (3 days on the job)	Once the individual has been hired and maintained employment for three days in a position that matches the vocational objective in the Individual Plan for Employment or otherwise agreed upon by counselor and consumer, the program is eligible for payment.	1. Milestone Payment # 4 Authorization	1. Task Analysis 2. Updated CRP Service plan with initial Intensive Training Plan	10%	\$ 800.00

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# MILESTONE # 5 – TRAINING AND STABILIZATION

Supported Employment Milestone	Service Definition	VR Documentation	CRP Documentation Required	Payment %	Amount
5. Training and Stabilization	In order for the client to be successful on the job, Intensive Training must occur. This includes one-on-one training with the job coach on the job site. It may also include employment advocacy time, non-employment advocacy time, and community resource training. Supported Employment must include fading and the process of stabilization. This is all guided by the task analysis with daily ratings, training plan and the progress the client makes on the job.	1. Milestone Payment #5 Authorization	1. Updated CRP Service Plan with complete Intensive Training Plan 2. Monthly Summary indicating the progress of the consumer and the impact made by the job coach 3. Task Analysis with daily ratings 4. Payment Request Form (include dates for VR approval of beginning and end of stabilization) 5. Extended Services Plan	20%	\$ 1,600.00

# MILESTONE # 6 – CLOSURE

Supported Employment Milestone	Service Definition	VR Documentation	CRP Documentation Required	Payment %	Amount
6. Closure	Payment will be made when rehab counselor has successfully closed the case and when the supported employment provider has submitted all required documentation. The client must have worked at least 90 days after stabilization ends and received adequate training and support after hire. Extended services must include at the minimum two on the job site support contacts per month unless otherwise indicated on the IPE. Successful closure must occur within 12 months of the date of stabilization.	<ol style="list-style-type: none"> <li>Milestone Payment #6 Authorization</li> <li>Closure statement upon achievement of successful closure</li> </ol>	<ol style="list-style-type: none"> <li>30/60/90 day Consumer and Employer Form</li> <li>26 payment request form</li> <li>Case service invoice</li> </ol>	25%	\$ 2,000.00
				100%	\$ 8,000.00



# SUPPORTED EMPLOYMENT PROPOSED MILESTONES PERCENTAGE & RATES

## Proposal # 2

1	Intake	5%	\$ 400.00	5%	\$ 350.00
2	Supplemental evaluation	10%	\$ 800.00	10%	\$ 700.00
3	Job Development	30%	\$ 2,400.00	30%	\$ 2,100.00
4	Retention	10%	\$ 800.00	10%	\$ 700.00
5	Training and Stabilization	20%	\$ 1,600.00	20%	\$ 1,400.00
6	Closure	25%	\$ 2,000.00	25%	\$ 1,750.00
		100%	\$ 8,000.00	100%	\$ 7,000.00

# WORK ADJUSTMENT PROPOSED MILESTONES

## Proposal # 1

Milestone 1 - Intake

Milestone 2 - Job Development/ Retention

Milestone 3 - Training and Stabilization

Milestone 4 - Closure

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# MILESTONE # 1 - INTAKE

Work Adjustment Milestone	Service Definition	CRP Documentation Required	VR Documentation Required	Payment %	Amount
1. Intake	Coordinate intake meeting once consumer is accepted into the program with VR, consumer and primary support persons (as determined appropriate) to determine goals, stated interests, evaluation/work availability	<ol style="list-style-type: none"> <li>1. A vocational profile</li> <li>2. Initial CRP Service Plan</li> </ol>	<ol style="list-style-type: none"> <li>1. Referral packet which may include: IPE (Amended IPE, if applicable), WRAP, Eligibility Decision W/ MSD Doc., Specialist Data (Medical and/or Psychological reports), Work &amp; Education History</li> <li>2. Milestone Payment # 1 Authorization</li> </ol>	5%	\$ 250.00

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# MILESTONE # 2 – JOB DEVELOPMENT & RETENTION

Work Adjustment Milestone	Service Definition	CRP Documentation Required	VR Documentation Required	Payment %	Amount
2. Development & Retention	<p>Client specific job development and placement and time spent analyzing information relevant to a client’s job development/placement is included here.</p> <p><u>Job development:</u> Locating jobs for people with disabilities through networking with employers, businesses and community leaders*</p> <p><u>Job Placement:</u> Securing a position that matches the skills, abilities, motivation, interests, needs, and goals of the individual to insure the greatest chance of success on the job</p> <p>Once the individual has been hired and maintained employment for three days in a position that matches the vocational objective in the Individual Plan for Employment, the program is eligible for payment</p>	<ol style="list-style-type: none"> <li>1. Monthly narrative reports during JD</li> <li>2. Job Placement Summary and indication of VR approval of placement match</li> <li>3. JD Milestone request form</li> <li>4. Case service Invoice</li> <li>5. Job Description/initial Task Analysis as needed</li> <li>6. An updated CRP Service Plan which includes the initial Work Adjustment Job Coaching Training Plan</li> <li>7. New hire form</li> </ol>	<ol style="list-style-type: none"> <li>1. Milestone Payment #2 Authorization</li> </ol>	40%	\$ 2,000.00

# MILESTONE # 3 – COMPLETION OF TRAINING GOALS

Work Adjustment Milestone	Service Definition	CRP Documentation Required	VR Documentation Required	Payment %	Amount
3. Completion of Training Goals	<p>In order for the client to be successful on the job, Training must occur. This includes one-on-one training with the job coach and could include on-the-job training, soft skill training, employment advocacy time, non-employment advocacy time, and community resource training. This is all guided by the training plan and the progress the client makes on the job.</p>	<ol style="list-style-type: none"> <li>1. Completed Task Analysis</li> <li>2. An updated CRP Service Plan which includes the completed Work Adjustment Job Coach Training Plan.</li> <li>3. Monthly summary indicating the progress of the consumer and the impact made by the job coach</li> <li>4. Payment request form</li> <li>5. WA Discharge Form (completion of training)</li> </ol>	<ol style="list-style-type: none"> <li>1. Milestone Payment #3 Authorization</li> </ol>	40%	\$ 2,000.00

# MILESTONE # 4 – CLOSURE

Work Adjustment Milestone	Service Definition	CRP Documentation Required	VR Documentation Required	Payment %	Amount
4. Closure	Payment will be made when rehab counselor has closed the case status "Status 26: Successful Closure" and when the provider has submitted all required documentation. The client must have worked at least 90 days beyond completion of training.	<ol style="list-style-type: none"> <li>30/60/90 day Consumer and Employer Form</li> <li>Status 26 payment request form</li> <li>Case service invoice</li> </ol>	<ol style="list-style-type: none"> <li>Milestone Payment #4 Authorization</li> <li>Closure statement upon completion of successful closure.</li> </ol>	15%	\$ 750.00
				100%	\$ 5,000.00

# WORK ADJUSTMENT PROPOSED MILESTONES PERCENTAGE & RATES

## Proposal # 1

1	Intake	5%	\$ 275.00	5%	\$ 250.00
2	Job Development/ Retention	40%	\$ 2,200.00	40%	\$ 2,000.00
3	Training and Stabilization	40%	\$ 2,200.00	40%	\$ 2,000.00
4	Closure	15%	\$ 825.00	15%	\$ 750.00
		100%	\$ 5,500.00	100%	\$ 5,000.00

# WORK ADJUSTMENT PROPOSED MILESTONES

## Proposal # 2

Milestone 1 - Intake

Milestone 2 - Job Development

Milestone 3 - Retention (3 days on the job)

\*Reserved for cases where employment has been obtained at the time of referral to CRP through VR or client obtains their own job. When the CRP is involved in job development they will receive milestone 3 which will include payment for development and retention to be received after three days on the job.

Milestone 4 - Training and Stabilization

Milestone 5 - 90 Day Closure



# MILESTONE # 1 - INTAKE

Work Adjustment Milestone	Service Definition	VR Documentation Required	CRP Documentation Required	Payment %	Amount
1. Intake	Coordinate intake meeting once consumer is accepted into the program with VR, consumer and primary support persons (as determined appropriate) to determine goals, stated interests, evaluation/work availability	<ol style="list-style-type: none"> <li>Referral packet which may include: IPE (Amended IPE, if applicable), WRAP, Eligibility Decision W/ MSD Doc., Specialist Data (Medical and/ or Psychological reports), Work &amp; Education History</li> <li>Milestone Payment # 1 Authorization</li> </ol>	<ol style="list-style-type: none"> <li>A vocational profile</li> <li>Initial CRP Service Plan</li> </ol>	5%	\$ 275.00

# MILESTONE # 2 - DEVELOPMENT

Work Adjustment Milestone	Service Definition	VR Documentation Required	CRP Documentation Required	Payment %	Amount
2. Development	<p>Client specific job development and placement and time spent analyzing information relevant to a client's job development/ placement is included here.</p> <p><u>Job development:</u> Locating jobs for people with disabilities through networking with employers, businesses and community leaders*</p> <p><u>Job Placement:</u> Securing a position that matches the skills, abilities, motivation, interests, needs, and goals of the individual to insure the greatest chance of success on the job</p>	<ol style="list-style-type: none"> <li>Milestone Payment #2 Authorization</li> </ol>	<ol style="list-style-type: none"> <li>Monthly narrative reports during JD</li> <li>Job Placement Summary and indication of VR approval of placement match</li> <li>JD Milestone request form</li> <li>Case service Invoice</li> <li>New hire form</li> </ol>	35%	\$ 1,925.00

# MILESTONE # 3 – RETENTION

Work Adjustment Milestone	Service Definition	VR Documentation Required	CRP Documentation Required	Payment %	Amount
3. Retention	Once the individual has been hired and maintained employment for three days in a position that matches the vocational objective in the Individual Plan for Employment, the program is eligible for payment	1. Milestone Payment #3 Authorization	1. Job Description/initial Task Analysis as needed 2. An updated CRP Service Plan which includes the initial Work Adjustment Job Coaching Training Plan	10%	\$ 550.00

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# MILESTONE # 4 – COMPLETION OF TRAINING GOALS

Work Adjustment Milestone	Service Definition	VR Documentation Required	CRP Documentation Required	Payment %	Amount
4. Completion of Training Goals	<p>In order for the client to be successful on the job, Training must occur. This includes one-on-one training with the job coach and could include on-the-job training, soft skill training, employment advocacy time, non-employment advocacy time, and community resource training. This is all guided by the training plan and the progress the client makes on the job.</p>	<ol style="list-style-type: none"> <li>Milestone Payment #4 Authorization</li> </ol>	<ol style="list-style-type: none"> <li>Completed Task Analysis</li> <li>An updated CRP Service Plan which includes the completed Work Adjustment Job Coach Training Plan.</li> <li>Monthly summary indicating the progress of the consumer and the impact made by the job coach</li> <li>Payment request form</li> <li>WA Discharge Form (completion of training)</li> </ol>	40%	\$ 2,200.00

# MILESTONE # 5 – Closure

Work Adjustment Milestone	Service Definition	VR Documentation Required	CRP Documentation Required	Payment %	Amount
5. Closure	Payment will be made the client has worked at least 90 days beyond completion of training. This must occur within 12 months of the date of the completion of training goals.	<ol style="list-style-type: none"> <li>Milestone Payment #4 Authorization</li> <li>Closure statement upon completion of successful closure.</li> </ol>	<ol style="list-style-type: none"> <li>30/60/90 day Consumer and Employer Form</li> <li>Case service invoice</li> </ol>	10%	\$ 550.00
				100%	\$ 5,500.00

# WORK ADJUSTMENT PROPOSED MILESTONES PERCENTAGE & RATES

## Proposal # 2

1	Intake	5%	\$ 275.00	5%	\$ 250.00
2	Job Development	35%	\$ 1,925.00	35%	\$ 1,750.00
3	Retention (3 days on the job)	10%	\$ 550.00	10%	\$ 500.00
4	Training and Stabilization	40%	\$ 2,200.00	40%	\$ 2,000.00
5	Closure	10%	\$ 550.00	10%	\$ 500.00
		100%	\$ 5,500.00	100%	\$ 5,000.00

# BENEFITS OF MILESTONE PAYMENT SYSTEM AS PROPOSED

- Increase organizational efficiency thru simplified documentation
- Proposed no consideration of moneys earned from carry over cases
- Increased communication and establishing appropriate cases
- Proposed increase in rate for service
- Proposed retention payment to cover the cost associated with referral of a consumer who is employed
- Clearly defined milestones, requirements and payments upon milestone completion

## **AREAS OF CONTINUED SUBCOMMITTEE DISCUSSION**

- Multiple placement milestones (current average is 1.5 placements)
- Multiple training and stabilization milestones

## **NOTES**

- Subcommittee minutes are shared monthly through Survey Max (this is an anonymous way of providing feedback)
- Limited feedback received to this point



## SUBCOMMITTEE MEMBERS

**Julia Augustoni** (Monarch),  
**David Bolick** (Forerunner Services),  
**Alicia Camacho** (Durham Exchange  
Club Industries),  
**Tommy Cox** (RHA Howell),  
**Joan DeStefano** (RHA Health),  
**Bridget Hassan** (Easter Seals),  
**Josh Hilbert** (Irene Wortham Center),  
**Courtney Horton** (Cape Fear Vocational  
Services)

**Elizabeth Leggett** (Beaufort County  
Development Center),  
**Sherry Lusk** (Access Vocational Services),  
**Michael Maybee** (Watauga  
Opportunities),  
**Laurie Mills** (Family Preservation  
Services of NC),  
**Kathy Stickse** (OE Enterprises),  
**Lisa Ward-Ross** (Eastern Carolina  
Vocational Center)

### DVRS Staff

VR CRP Specialists (6)  
Trish Harper, Chief Financial Analyst - Fiscal  
Services  
Kenny Gibbs, Chief of Employment Services &  
Program Development