



## ACTIVITY 2:

# Plan phase collaboration

**INSTRUCTIONS:** After you've watched the [E1MN: Plan responsibilities training](#), read the excerpt from Karissa's story below. Then, for each role (the person, case manager, vocational rehabilitation staff and employment service provider), identify two responsibilities that are demonstrated in the excerpt. You can find a [complete list of responsibilities for each role here](#).

## KARISSA'S STORY: PLAN PHASE



During the Engage phase, Karissa and Grand Services staff learned that she's interested in competitive employment in the community, but they still don't know what sort of job Karissa is interested in. Karissa and her team agree she should move to the Plan phase and receive waiver employment development services.

Karissa wants to keep working with Grand Services, so her waiver case manager updates her support plan, ends waiver employment exploration services, and authorizes waiver employment development planning services through Grand Services. And this time, since Karissa has her own My Vault account, the case manager shares the updated support plan with Karissa through My Vault so that she has her own information.

Through exploration, Grand Services and Karissa learned that her interests are mainly in arts and crafts, baseball, and animals, especially dogs. She also said she wouldn't mind work in assembly since she has experience with that at Grand Services. They also know she'll need something fairly close to where she lives and on the bus line. And they know it's important to her parents that she keeps her SSI and her Medical Assistance.

In waiver development planning, Grand Services staff helps Karissa develop a portfolio that will help her get set up for success in her job search. They uploaded the portfolio and related document into her vault so they're ready when she needs them. They also help her see what will happen to her benefits when she works by doing a DB101 Estimator session on [mn.db101.org](http://mn.db101.org).

During this phase, Karissa's case manager has some questions about VR services, and the right timing for a referral to VR for a job search so she reaches out to the VRS/SSB Waiver Liaison that covers her local office. Together, Karissa's case manager and the VRS Liaison talk about what's happening through waiver employment development planning services, and they agree that there's more work that can be done under the waiver before transitioning over to VR. They agree to stay in contact about the timing of the referral to VR when it's needed.

Grand Services sets up some job tours over the next three weeks, so Karissa can learn more about the possible opportunities for employment. Karissa's first job tour is at a doggy daycare a few blocks from her house. Karissa is a little overwhelmed by the chaos and noise at the doggy daycare, and she decides that wouldn't be for her. The second is with the athletic department at the local community college, a few miles from her house. She likes the idea of helping out somewhere with sports and would love going to the games with the team, but she's not thrilled with things like wiping down the equipment in the workout room and working mostly by herself. The third job tour is a large craft supply store a few miles from her house. She likes the craft store a lot and thinks it would be fun to open up and unpack all the boxes, see the new stuff coming in and then sort it and put it on the shelves. She also likes the idea of meeting new people and interacting with customers and coworkers.

Through the things they did in the waiver development planning, Karissa now knows that she really is interested in working in the community. She understands what that means, and she has an idea of what she might like to do.

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**KARISSA’S STORY: PLAN PHASE (CONT.)**

Grand Services staff worked with Karissa to complete the Positive Summary, which is a tool available in a professional My Vault account that provides a way to summarize everything that was learned during the employment

planning phase. They share the Positive Summary with her case manager and parents. They update them and they talk together about the next phase and steps to move forward.

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**INSTRUCTIONS:** For each of the four roles below, list the two responsibilities you identified in the excerpt and write the specific information from the excerpt that demonstrates the responsibility. You can find [a complete list of responsibilities for each role here](#).

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**1. THE PERSON (KARISSA)**

**Responsibility 1:**

Information from the excerpt that demonstrates this responsibility:

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**Responsibility 2:**

Information from the excerpt that demonstrates this responsibility:

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**2. CASE MANAGER**

**Responsibility 1:**

Information from the excerpt that demonstrates this responsibility:

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**Responsibility 2:**

Information from the excerpt that demonstrates this responsibility:

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### 3. VOCATIONAL REHABILITATION STAFF

**Responsibility 1:**

Information from the excerpt that demonstrates this responsibility:

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**Responsibility 2:**

Information from the excerpt that demonstrates this responsibility:

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### 4. EMPLOYMENT SERVICE PROVIDER

**Responsibility 1:**

Information from the excerpt that demonstrates this responsibility:

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**Responsibility 2:**

Information from the excerpt that demonstrates this responsibility: