

# Education Experience Report

Attach to career profile when a person starts school or a technical training program.  
Finish this form when a person exits a school or technical training program

Client: Click here to enter text.

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Employment/Educational Specialist: Click here to enter text.

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School or training program: Click here to enter text.

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Degree or certificate sought: Click here to enter text.

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Start date: Click here to enter text.

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Full time or part time: Click here to enter text.

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Date person exited the school/training program: Click here to enter text.

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Degree/certificate obtained: Click here to enter text.

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Reason that person left the school/training program:  Graduation;  Other:  
Click here to enter text.

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Level of disclosure: Click here to enter text.

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Supports provided by education specialist: Click here to enter text.

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Supports provided by office for students with disabilities: Click here to enter text.

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Obstacles encountered/how did person overcome obstacles? Click here to enter text.

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Future education goals: Click here to enter text.

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Lessons learned for future education or job experiences: Click here to enter text.

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\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

## Education Profile Supported Education Referral

### Face Sheet

Date of referral: 12/15/2016

Name: Ben FakeClient  
Address: 123 There ave. Nowheresville, Oregon 97555  
Email: ben.fakeclient@gmail.com  
Phone number/s: 555-555-5555  
Best way to reach: Call, text or email

Case Manager/therapist: Jamie lamatherapist

State Vocational Rehabilitation counselor: n/a

Referral sent to State Vocational Rehabilitation

Other healthcare/social service providers: Case manager- Vicky (here at OSECE), Working with DHS, OHP, in DBT groups twice per week- this will end by March.

What is the person saying about school and work? Why does s/he want to go to school now? What type of program? Are they currently enrolled in an educational program?

Ben is interested in going to a community college. He attended homeschool for the last 6 years of his schooling. He isn't sure what he wants to do in school, he likes art.

Is this person interested in career exploration to advance his/her educational/career goals?

Yes, he said that she would like help finding a career/degree.

Please include some information about the person's illness (diagnosis, symptoms, etc.). How might the person's illness (and/or substance use) affect school or careers?

Ben has PTSD, Major depressive disorder and generalize anxiety. He gets very anxious in new situations.

Ben has told me that he will dissociate or become hyper vigilant when around a large group of people or if he becomes overwhelmed. He will leave a situation and often never try it again if he gets overly agitated or anxious.

What are some of the person's strengths? (Experience, training, personality, supports, etc.)

Ben is smart and excited to start school. He has given this a lot of thought and attention. His mother is very supportive of him trying school. His has said that his sister attends the community college but they don't always get along.

What career (type of job, hours, etc.) do you think would be a good match? What type of educational program (major, credit hours, etc.) do you think would be a good match?

Ben talks a lot about art but I don't think he has thought about a career goal. My opinion is to have him start off slow with a couple classes. Maybe help him find teachers that can be accommodating? (Is that something that you can do?)

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Jamie Imatherapist

Therapist

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Person making referral

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Title

### **Career & Education Profile**

This form is to be completed by the employment/Education Specialist during the first few weeks of meeting with someone. Sources of information include: the person, the mental health treatment team, client records, and with permission, family members and previous employers/educators. The profile should be updated with each new job and education experience using job start, job end, and education experience forms.

### **Work Goal**

What is your dream job? What kind of work have you always wanted to do?

“I don't know. Something with art. I guess I have always wanted to design greeting cards or be able to sell my art as a job. Maybe welding art, that way I don't have to talk to others while I'm working.”

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What are your long-term career goals?

“Long term, I'd like to get a degree and then work in some way with art.” Ben stated that he isn't interested in jobs where he has to talk too much to others or customers.

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What type of job do you think you would like to have now?

“I don't think I want a job right now. I'd like to focus on school and starting that process. Maybe overtime.”

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What is it that appeals to you about that type of work?

“I love art. I think I'm kinda good at it. It's the only thing anyone every said I was good at when I was in public school. I really do enjoy creating things.”

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What type of job(s) do you know that you would not want?

Ben stated that he doesn't want to work in food service of any kind. Not even at the school.

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Do you know people who are working? What types of jobs? What do you think about those jobs?

“My mom works. I don't really know what she does, she works in an office as a secretary or something. I don't want to have to interact with that many people or answer phones.”

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Is there anything that worries you about going to work? Why do you want to work?

“Well, yeah. I don’t want to work now and I don’t know what I will think of school. If I do well, maybe I will want to work more.”

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## Education

Are you interested in going to school or attending vocational training now to advance your work career?

“Yes. I want to go to the community college.”

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What are your top three educational areas of interest?

Art, writing & art welding- Ben explained that he took a welding class once and really like it. He liked the hard metals but also that he didn’t have to chat a lot while doing it.

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What is your long term educational goal?

“To find and complete a degree allowing me to have a job in art.”

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What is your short term (3-6 months) educational goal?

“I want to try school, at the community college. I’d like to start in the spring and take an art class. I want to make it through classes and not leave when I am anxious like I did before I was home schooled.”

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### Education/learning history

Did you complete high school?

No

Yes

If no, would you be interested in earning your GED/high school equivalency diploma?

No

Yes

N/A

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Did you participate in vocational training classes in high school?

No

Yes

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Have you ever completed an apprenticeship (i.e., plumbing, welding, electrician, etc.)?

No

Yes

If so, what year? [Click here to enter text.](#)

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Did you complete any job related job-related training in the military?

No

Yes

N/A

Please describe the training, including years and any certificates earned. I go my high school diploma in 2015

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**Other education or training programs**

N/A

Name of Educational/ Training Institution: Home schooled (ESD)

City/State: Oregon

Years attended: 2011-2015

Type of degree or certificate sought: Diploma

Degrees, certificates, or classes completed: n/a

If program was not completed, why not? [Click here to enter text.](#)

Liked most about the program: I liked that I got to work at my own pace with the online tests. I could work on homework when I wanted not just during the day.

Liked least about the program: Well having to go into the school building to take a couple tests. I didn't like being around that many people. That's why I was home schooled after the 8<sup>th</sup> grade. I did miss being able to take more art classes with other teachers. I did a couple classes through parks and rec but it wasn't really the same.

Type of financial aid used, if any: n/a

Name of Educational/ Training Institution: [Click here to enter text.](#)

City/State: [Click here to enter text.](#)

Years attended: [Click here to enter text.](#)

Type of degree or certificate sought: [Click here to enter text.](#)

Degrees, certificates, or classes completed: [Click here to enter text.](#)

If program was not completed, why not? [Click here to enter text.](#)

Liked most about the program: [Click here to enter text.](#)

Liked least about the program: [Click here to enter text.](#)

Type of financial aid used, if any: [Click here to enter text.](#)

Name of Educational/ Training Institution: [Click here to enter text.](#)

City/State: [Click here to enter text.](#)

Years attended: [Click here to enter text.](#)

Type of degree or certificate sought: [Click here to enter text.](#)  
Degrees, certificates, or classes completed: [Click here to enter text.](#)  
If program was not completed, why not? [Click here to enter text.](#)  
Liked most about the program: [Click here to enter text.](#)  
Liked least about the program: [Click here to enter text.](#)  
Type of financial aid used, if any: [Click here to enter text.](#)

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Do you have copies of the degrees, licenses, certificates that you have earned?

No  Yes

I have my diploma

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Are you interested in earning a specific certificate, license, or degree for work?

No  Yes

[Click here to enter text.](#)

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If the individual is not interested in additional schooling or technical training now, skip the next set of questions and ask about work history instead.
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What types of jobs are you interested in obtaining?

Do you know of a specific training/education program you would like to pursue?

“Just that I want to go to the community college. I am interested in learning more about what programs they have or if there is any options with art.”

What is it about that field that interests you?

[Click here to enter text.](#)

Do you know about the availability of those jobs in this area? What is the occupational outlook for those jobs?

“I really don’t know. I guess it might be hard to be an artist. I have looked into cards before. That you can do from anywhere.” Welding is an interest- Ben took a class once and enjoyed it. He likes that you really can’t chat while you are welding and that you get to still do something with your hands.

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When would you like to start an educational or training program?

“Next term, I think that is spring term.”

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How long do you want to go to a school or training program? What is your timeframe for completing education or training?

“I’m not sure. How long does it take? Maybe we can talk about the options, like what it would be for a bachelors degree or something at the community college.”

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Do you know the educational requirements for this educational or training program?

No. Ben would like to discuss this more in the future.

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Would you be interested in visiting some local programs (community college, four-year college, adult vocational training) to learn about different options for degrees and certificates?

“Yeah, maybe not the university yet. That is a little scary right now but I do want to see the community college and take a tour.”

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Are you interested in joining a trade union (e.g., baker’s, maintenance)? Do you know the requirements for joining? Would you like to visit the union office to learn more?

No.

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Are there any other job training or educational opportunities that you would like to learn more about?

Ben stated that other than art, he was interested in what careers can be done with an English degree or “writing major” as well as what jobs are available with welding and if he could do welding art.

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### School Experiences

Let’s talk about some of your school experiences and how they were for you.

			Comments
Being called on in class	<input type="checkbox"/> Okay	<input checked="" type="checkbox"/> Problem	“I really don’t like being called out. It makes me get really anxious. What if I’m not paying attention? Then I’ll feel really bad.”
Social situations	<input type="checkbox"/> Okay	<input checked="" type="checkbox"/> Problem	“Not really a social guy. I hate being around large groups of people.”
Taking tests	<input checked="" type="checkbox"/> Okay	<input type="checkbox"/> Problem	“The test is fine. I just need a quiet space”
Learning from lecture	<input checked="" type="checkbox"/> Okay	<input type="checkbox"/> Problem	Ben explained that he likes learning from a lecture setting.
Learning by reading	<input checked="" type="checkbox"/> Okay	<input type="checkbox"/> Problem	“Reading is one of my past times”
Learning hands on	<input checked="" type="checkbox"/> Okay	<input type="checkbox"/> Problem	Ben said it was okay but not his favorite way to learn especially if it’s in a group setting.
Concentration	<input checked="" type="checkbox"/> Okay	<input checked="" type="checkbox"/> Problem	“I can concentrate if it’s a quiet space. But if something is going on that is bothering me then it’s hard to think.”

Memory

Okay  Problem

That's alright most of the time. It gets worse if I drift away during class or if I get anxious then I might not remember what just happened."

Using computers

Okay  Problem

"I'm really good at computers"

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Did you have an IEP (individual education plan) while you were in school? Did that include different strategies to help you learn? What were those?

"Yes, I had one in elementary and middle school. I didn't need it when I was home schooled."

Ben stated that this plan mainly identified testing strategies like having a quiet testing space Ben said that he couldn't remember anything else.

When talking with Ben's Mother, Angela, She stated that he did have a few modifications about where he sat in the classroom and time for assignments as he would often work at a slower pace than other kids.

Jamie (Ben's Therapist) suggested talking with disability services on campus about Ben's anxiety to see if there were accommodations that could be made. Jamie suggests, Ben being able to leave the room as needed, a recorder and a quiet space for testing.

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Were you in any advanced classes? Which ones?

Ben stated that in middle school he was reading at a college level but couldn't identify any other AP or advanced classes.

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Has anyone ever told you that you had a learning disability? What do you know about that? What accommodations have helped you in the past?

"No, not a learning disability." Ben's mother did confirm that he had not be reviewed for a learning disability as a child or teen.

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What are your strengths related to being a student?

"I go at my own pace. When I like a subject I can go really fast. I like learning new things and techniques."

Ben's mother stated that he is a great reader and great at typing. "Where he really shines is his art. He is great at all kinds of art. I wish I could have supported his creative side more but those things cost a lot of money."

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What languages do you know?

Just English. I did take two years of Spanish but I really can't remember much.

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### **Plans for School and Training**

What do you need in order to start school?

Access to a computer  Computer literacy  Quiet place to study  Transit card



- Financial aid                       Books/ supplies                       Mental health support                       Eldercare  
 Help with transit route                       Help studying                       Help with a study calendar                       Childcare  
 Help navigating campus                       More support from family/friends  
 Help talking to teachers/instructors                       Other: [Click here to enter text.](#)

Comments: “I really want help with figuring out what I should do in school and maybe thinking about jobs in the future. Right now I don’t do a lot during the day and I want to be able to have a job so I can do more things in the future.”

What are your resources for paying for school tuition? For books? For other school costs?  
 “I don’t know. I don’t have a lot of money. My mom said that she really can’t afford for me to go to school so I need to figure that out.”

Have you ever received financial aid for school? Have you ever had a grant? What type? Have you ever defaulted on a grant or student loan?  
 No. This is Ben’s first time applying for a college.

Do you need any type of classroom accommodations?  
 “Yeah, I think so. I’d like to be able to record what the teacher is saying because sometimes I zone out a little and then I am totally lost later.”

What other types of supports may help you succeed in school or training?  
**Ben talked about needing Mental Health support. “I need to remember my DBT skills and think about staying in the moment.” He would like to plan his therapy appointments around the first few days of school.**

How do you plan on getting to the school?  
**“The bus, but I will need a bus pass and learn how to ride the bus from my house to get to school.”**

### Education Supporters

- | Who do you rely on for support?   | Have they encouraged you to go to school?  |
|---|--|
| <input checked="" type="checkbox"/> Mother/Guardian Angela- Ben’s Mother            | Contact: 555-555-5555 <input checked="" type="checkbox"/> Yes <input checked="" type="checkbox"/> No                   |
| <input type="checkbox"/> Father/Guardian <a href="#">Click here to enter text.</a>  | Contact: <a href="#">Click here to enter text.</a> <input type="checkbox"/> Yes <input type="checkbox"/> No            |
| <input type="checkbox"/> Spouse/Sig other <a href="#">Click here to enter text.</a> | Contact: <a href="#">Click here to enter text.</a> <input type="checkbox"/> Yes <input type="checkbox"/> No            |
| <input checked="" type="checkbox"/> Brothers/Sisters Megan                          | Contact: 222-222-2222 <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No                              |
| <input type="checkbox"/> Relatives <a href="#">Click here to enter text.</a>        | Contact: <a href="#">Click here to enter text.</a> <input type="checkbox"/> Yes <input type="checkbox"/> No            |
| <input type="checkbox"/> Friends <a href="#">Click here to enter text.</a>          | Contact: <a href="#">Click here to enter text.</a> <input type="checkbox"/> Yes <input type="checkbox"/> No            |
| <input type="checkbox"/> Spiritual leader <a href="#">Click here to enter text.</a> | Contact: <a href="#">Click here to enter text.</a> <input type="checkbox"/> Yes <input type="checkbox"/> No            |
| <input checked="" type="checkbox"/> Other Jamie “He’s been a big support”           | Contact: <a href="#">Click here to enter text.</a> <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No |

## Work Experience

### Most recent job

N/A – Person has no work experience

Job title: [Click here to enter text.](#)

Employer: [Click here to enter text.](#)

Job duties: [Click here to enter text.](#)

Start Date: [Click here to enter text.](#) End Date: [Click here to enter text.](#)

How many hours per week: [Click here to enter text.](#)

How did you find this job? [Click here to enter text.](#)

What did you like about job? [Click here to enter text.](#)

What did you dislike? [Click here to enter text.](#)

What was your supervisor like?  
Your co-workers? [Click here to enter text.](#)

Reason for leaving job? [Click here to enter text.](#)

Other info about job: [Click here to enter text.](#)

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### Next most recent job

N/A – Person has only had one job

Job title: [Click here to enter text.](#)

Employer: [Click here to enter text.](#)

Job duties: [Click here to enter text.](#)

Start Date: [Click here to enter text.](#) End Date: [Click here to enter text.](#)

How many hours per week: [Click here to enter text.](#)

How did you find this job? [Click here to enter text.](#)

What did you like about job? [Click here to enter text.](#)

What did you dislike? [Click here to enter text.](#)

What was your supervisor like?  
Your co-workers? [Click here to enter text.](#)

Reason for leaving job? [Click here to enter text.](#)

Other info about job: [Click here to enter text.](#)

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### Next most recent job

N/A – Person has only had two jobs

Job title: Click here to enter text.  
Employer: Click here to enter text.  
Job duties: Click here to enter text.  
Start Date: Click here to enter text. End Date: Click here to enter text.  
How many hours per week: Click here to enter text.  
How did you find this job? Click here to enter text.  
What did you like about job? Click here to enter text.  
What did you dislike? Click here to enter text.  
What was your supervisor like?  
Your co-workers? Click here to enter text.  
Reason for leaving job? Click here to enter text.  
Other info about job: Click here to enter text.

*Please use additional sheets for other jobs.*

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## Military Experience

**Not applicable because person was not in the military**

Branch: Click here to enter text.  
Dates: Click here to enter text.  
Training or work experience: Click here to enter text.  
Certificate or license: Click here to enter text.

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## Cultural Background

Use the following script to introduce the next set of questions to the person.

**“Our agency aims to work with people from different backgrounds and with diverse experiences. The next set of questions will help me understand your background and culture, which may help us in planning for jobs.”**

What is important to you in terms of your background and culture? (i.e., race, ethnicity, color, gender, economic status, etc.)

“I grew up kinda poor. My father went to prison when I was really young and so that has made things a challenging for me and my family.”

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Which different languages do you speak? Which language do you prefer?  
“I prefer English. I really don’t speak anything else even with the two years of Spanish.”

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What special events or holidays do you celebrate? Are there family traditions that you still practice? How would you like your family involved as we move forward in the process of getting and keeping a job?

“Just the basic, Christmas and thanksgiving and stuff. I don’t remember any family traditions. Well my mom usually will get a little drunk on thanksgiving. That’s it though.”

“My mom can be involved. I mean, I’ll need her information for financial aid. I don’t want her coming to school or anything but she knows my past with school and how hard it was. I don’t really want my sister involved in like the conversations around treatment or school. She is around but doesn’t need to make my decisions for me. She can take control easily and I don’t want her to do that again for this.”

Jamie is working on independence with Ben and is hoping to limit how much involvement his mother and sister have on his decision making, specifically around classes and his interests.

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Is it important to you whether your work supervisor is male or female?

No. Ben stated that he doesn’t have a preference for school either. He did say that he would like to work with a male advisor if at all possible but it was ok if it wasn’t.

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Have you ever felt discriminated against or treated unfairly when you were looking for work or on the job? Could you tell me about that?

“No. I did feel weird at school when teachers knew that my dad was in prison or they knew anything from my past.”

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## **Mental Health**

Has anyone ever told you that you have a mental illness? If so, what did they say?

Yes,

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How does your mental illness affect you?

“I get really anxious around large groups of people. I rely on others to make my decisions for me and sometimes I get so depressed and worried that I need to go to the hospital. It’s been a couple months.”

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What are the first signs that you may be experiencing a symptom flare-up?

I get hypervigilant

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How do you cope with your symptoms?

“I try to use my DBT skills. It will be different in a classroom setting. I used to just leave class for a while if I go upset. I want to try to stay in class but if I am really stressing, I will just walk around campus for a while. Sometimes I draw and that makes me feel better.”

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What medicines do you take and when do you take them?

I don't have any medications right now. I used to have some but now I don't. Jamie and I have been talking about me seeing the psychiatrist about a prescription for in the moment panic attacks. I might bring it up again now that I am getting ready to go to school.”

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How do the medicines work for you?

Ben stated that in the past he felt like he was in a fog. He took medication when he was in the 8<sup>th</sup> grade but he thinks it might have just been the wrong dose.

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## Physical Health

How is your physical health? Do you have any health problems?

Ben said that his physical health is good. Currently no issues. He did say that he has asthma but has an inhaler that he carries with him at all times.

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Do you have any problems with the following:

Standing for long periods

No

Yes

Can you stand for more than an hour?

No

Yes

Sitting

No

Yes

How long can you sit?

“However long I need. It's just not an issue”

Climbing stairs?

No

Yes

How many flights? How often?

“I mean, I'm not in shape but I can walk stairs.”

Lifting

No

Yes

How much can you lift?

“I don't know. Some like 50 lbs.”

Endurance

No

Yes

How many hours could you work each day?

[Click here to enter text.](#)

Each week?

“If I do get a job sometime. I think I want it to be part time. For school too.”

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What is the best time of day for you?

“During the day. Not too early maybe like 11 to about 11pm.”

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## Cognitive Health

Do you have problems with memory?

Ben discussed that he doesn't think he has problems with his memory, just that he sometimes will "zone out" or not be fully present in the moment. He can recall a lot of things that he learned in high school and before.

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Concentrating?

Similarly to memory, it's more about what is going on with this mental health. He stated that he does the best when he is in a very quiet space with no other people.

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Doing things fast (psychomotor speed)?

"I'm ok with fast for something's. When I was a kid, I had to get extensions on assignments but really it was mostly because I would zone out in class and then not know what to do. That is why I want to get a recorder or something. Also, in art I think I'm pretty fast or like normal."

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If so, what things have helped with these issues in the past?

See above answer

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## Getting Ready for a Job

Do you have the clothes you will need for a job? For interviews?

Ben expressed that he has clothes for school.

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Do you have an alarm clock or way to wake up for work?

Ben stated that he had a cell phone which has an alarm clock for school.

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Do you have two forms of identification? Picture ID, social security card...?

Yes. An ID card and a SS card.

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How will you get to work?

[Click here to enter text.](#)

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## Interpersonal Skills

Would you like a job that involved working with the public?

"No. Not really. If I owned my own gallery, maybe then it would be okay."

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Where do you live and with whom do you live?

"I live at my mom's house with my sister and my mom."

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Who do you spend time with? How often do you see or talk to them?

“Mostly my mom and sister. I see them about daily, my sister less. I have some online friends and do RPG’s (role-play games like world of Warcraft) and stuff like that. It’s really how I spend my time.”

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Who can help us think about jobs you would enjoy?

I think my mom is a good person to talk to about school interests. But actually, I think Jamie is better.

Appointment made with this person to discuss jobs.

If not, why? Discussed education with Ben’s mother on 12/16/16.

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Once you are employed, who would be a good person to support you?

[Click here to enter text.](#)

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Anyone else?

[Click here to enter text.](#)

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### Benefits

Do you receive any of the following benefits?

- SSI       SSDI       Housing Subsidy       Food Stamps       TANF
  - Retirement from previous job       VA benefits (combat related?  Yes)
  - Spouse or dependent child receives benefits
  - Medicaid       Medicare       Other benefits: OHP
  - Unsure which benefits s/he receives
  - No benefits
- 

Do you manage your own money?

“Well my mom does it really. I got SSDI when I was younger and now I have it so she really makes sure it’s all working.”

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Referral made to benefits planner.

If no referral, why not: We will discuss his current benefits with the school financial aid advisor. If anything will change, EdS will discuss this with Ben and Angela and assist in connecting them to a benefits planner if needed.

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### Disclosure – Work Setting

(or use “Plan for Approaching Employers” Worksheet)

Please explain that each person using supported employment services can decide whether or not their specialist will contact employers on their behalf.

What could be some of the advantages of having an employment specialist contact employers on your behalf?

[Click here to enter text.](#)

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What could be some of the disadvantages?

[Click here to enter text.](#)

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Are there any things that you would **not** want your employment specialist to share with an employer?

[Click here to enter text.](#)

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Do you know whether or not you would like your specialist to go ahead and contact employers on your behalf? (It is okay to change your mind at any time):

[Click here to enter text.](#)

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If you decided that the specialist should not contact employers, what things would you like him or her to do in order to help you find a job?

- Help with job leads
  - Help filling out applications
  - Help writing a resume
  - Rides to job interviews
  - Practicing job interview questions and answers
  - Help following up on applications
  - Other: [Click here to enter text.](#)
- 

## Disclosure – Educational Setting

Please explain that each person using supported education services can decide whether or not to disclose their disability to the educational institution. Choosing to disclose to the appropriate disability office may increase risk for feeling stigma but may also open opportunities for educational support and accommodations. Choosing not to disclose to the disabilities office may reduce the risk of feeling stigma but may limit the types of assistance the student could receive.

What could be some of the advantages of disclosing your disability to the institution?

“People would know and would be able to help me if I needed it. I like the idea of having someone to talk to on campus if that is needed and if I don’t have to explain everything that would just make it easier.”

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What could be some of the disadvantages?

“People could see me differently than other students. I think that is what happened in Middle School. All the teachers knew and so it just got weird.”

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If you did choose to disclose your disability to an accommodations office, are there any details related to the disability that you would **not** want to disclose?

No, I want them to know everything at the disability services office.” Ben explained that he doesn’t want to disclose to teachers or other students. He would like to disclose to at least one academic advisor and possibly others in the student support section of the college. He would like to discuss disclosing to student support each time. He doesn’t want to disclose anything related to his fathers criminal past.

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Please explain that disclosing to the disabilities office does not mean they have to disclose to the student’s instructor. The instructor has the right to ask the disabilities office whether or not the student in their class legally meets the requirements for receiving an accommodation but the instructor does not have a right to more detailed information.

Do you know whether or not you want to disclose your disability to the institutions disability office?

“Yes, I want to disclose to the disability services department.”

---

Please explain that some people choose to disclose to others at the educational institution in addition to the disability office. Some choose to disclose to campus counselors, academic advisors, peers, instructors, dorm-mates, or ombudsman representatives. There are positives and negatives for disclosing to each of these individuals and/or groups. (If the client would like to discuss in more detail the pros and cons of disclosing to these other people you may want to help them walk through a more in-depth disclosure decision making process).

---

## Substance Use

How much alcohol do you drink?

None. Never tired it.

How often?

[Click here to enter text.](#)

Is there a particular time of day?

[Click here to enter text.](#)

---

What drugs do you, or have you, used?

None.

How often?

[Click here to enter text.](#)

---

## Legal History

Have you ever been arrested?

“No.”

---

Have you ever been convicted of a crime?

“No”

---

Conviction 1:

Year:

[Click here to enter text.](#)

[Click here to enter text.](#)

Sentence:

[Click here to enter text.](#)

---

Conviction 2:

Year:

[Click here to enter text.](#)

[Click here to enter text.](#)

Sentence:

[Click here to enter text.](#)

---

Conviction 3:

Year:

[Click here to enter text.](#)

[Click here to enter text.](#)

Sentence:

[Click here to enter text.](#)

---

Conviction 4:

Year:

[Click here to enter text.](#)

[Click here to enter text.](#)

Sentence:

[Click here to enter text.](#)

---

Conviction 5:

Year:

[Click here to enter text.](#)

[Click here to enter text.](#)

Sentence:

[Click here to enter text.](#)

---

Conviction 6:

Year:

[Click here to enter text.](#)

[Click here to enter text.](#)

Sentence:

[Click here to enter text.](#)

---

What problems, if any, were you having in your life at the time of the offenses?

[Click here to enter text.](#)

Do you have any pending legal charges? If so, what charge?

[Click here to enter text.](#)

Parole Officer name: [Click here to enter text.](#)

PO phone number: [Click here to enter text.](#)

Do you have a copy of your rap sheet?  No  Yes  
Do you want to get a copy of it?  No  Yes

---

### Daily Activity

What is a typical day like for you from the time you get up until you go to bed?  
Well I get up around 9-11 and then take a shower. I'll make some cereal. I watch TV or go on the computer. Sometimes I'll read or draw. When I have DBT classes or therapy, I make sure I coordinate that with my mom so I have a ride. Later in the evening, we (Angela and Ben) usually eat dinner together. Watch more TV or something and then I go to bed."

---

Are there places in your neighborhood that you like to go to?  
"Sometimes I'll go to the park or I'll walk to the corner market to get a soda."

---

Do you belong to clubs, groups, a church, etc.?  
"No. We used to go to church but my mom burned that bridge. I miss it sometimes. I think I'd like to get out of the house more."

---

What hobbies or interests do you have?  
Reading Sci-Fi books, computer games, Xbox games, art (drawing, if Ben has the supplies he likes to paint or do other kinds of artwork.)

---

What are your typical sleep hours?  
11ish-9ish. Depends if I am into a game or something.

---

### Networking Contacts (Family, friends, previous employers, other)

#### Information from Family, Previous Employers or Others

**Angela- Ben's Mother:** Angela discussed that she is happy that Ben is going to go to school. She would like him to get out of the house more and "do something" with his day. She is supportive of him taking classes although she made it clear that she will not be able to take him to or from school or help him financially with any supplies or cost of classes. She thinks that Ben is a great artist, although she did express that she would like him to review other career goals where he, "might be able to make some money and one day move out on his own."

**Jamie- Ben's Therapist:** Jamie is supportive of Ben going to college. He would like to see Ben try to areas of interest and is hopeful that Ben can start to feel comfortable on the college campus. Over time, Jamie would like to support Ben in finding clubs or groups to belong in. Jamie suggested that Ben list out a few DBT techniques or wellness tools that Ben would use while he is on campus. Jamie is also working on providing documentation that is needed for Disability services.

\_\_\_\_\_  
Staff signature

Date: \_\_\_\_\_

\_\_\_\_\_  
Client signature

Date: \_\_\_\_\_



## **Education Resource Development**

### **Getting to know the Education Resource**

*Reintroduce yourself and purpose of visit; comment on information gained from research on program, use open ended questions and active listening to encourage the interviewee to do most of the talking. Think of unique and personal questions for each department you might visit. Below are examples of some questions you might use when talking with educational departments. (Note: the student may be with you during this visit.)*

#### **Example Questions**

1. Please tell me a little about your program? What is unique about it?
2. Who do you serve and how does someone apply?
3. What is the enrollment process into this program? How often, when in the year, timeline?
4. What are some of the policies or expectations that a student might need to know?
5. How often do you hold informational sessions or have office hours?
6. What are the pre-requisites to get into this program?
7. What are the entrance requirements to getting into this program? Maintaining?
8. Is this program financial aid eligible?
9. Is your program in a cohort model? What does this look like? (credit load per term, etc.)
10. What are your policies for a student that might need to medically withdraw from a term?
11. What does a typical course or degree plan look like for this program/degree?
12. What types of jobs do students get after participating in this program?
13. Can you explain when & how it's best for students to seek out your services?
14. What is your favorite thing about this program or department?
15. How can we coordinate in the future?

#### **Your questions:**

- 1.
- 2.
- 3.
- 4.
- 5.

## Individualized Educational Follow-Along Support Plan

**Name:** Click here to enter text.

**Date:** Click here to enter text.

<p><b>Long Term Goal:</b> Click here to enter text.</p> <p><b>Education Goal (in person's own words):</b> Click here to enter text.</p> <p><b>Level of Disclosure:</b> Click here to enter text.</p>			
Objective	Activities (include frequency)	Person(s) Responsible	Date started/completed
Click here to enter text.	Click here to enter text.	Click here to enter text.	Click here to enter text.
Click here to enter text.	Click here to enter text.	Click here to enter text.	Click here to enter text.
Click here to enter text.	Click here to enter text.	Click here to enter text.	Click here to enter text.
Click here to enter text.	Click here to enter text.	Click here to enter text.	Click here to enter text.

### Follow-Along Support Menu of Possibilities

Daily Supports	Transportation	Financial Aid
<p>Keeping track of class schedule/calendar Tracking homework assignments and deadlines Waking up on time alarm clock/phone call Meals/snacks /medications Health/Grooming Personal Support and Coaching</p>	<p>Rides to and from school Auto repairs Purchasing vehicle Plan to approach other students for rides Bus pass/ travel training Help with Bicycle or Gas Voucher Obtaining Driver’s license</p>	<p>Searching for new financial aid opportunities Review student loans, scholarships, eligibility programs, work study, grants, pell grants, while covering benefits and responsibilities of options. Resubmitting FAFSA as needed.</p>
Instructor and Student Relationship	Staying Sober	Managing symptoms
<p>Strategy to disclose/not disclose Strategies for managing in-class dynamics and interactions Managing anxiety – negative self talk. Plans to get performance feedback from instructors Plans for interpreting and dealing with lower grades or scores and feedback Plans for talking with instructors and peers. How to ask for and receive help</p>	<p>Plan to include sponsor/mentor in education issues Address potential substance use at school Address students offer to use Plan for support on paydays Meet with A&amp;D team to plan supports</p>	<p>Plan for managing stress, anxiety- self care How to recognize symptoms Plan for what to do if symptoms arise at school How to call in sick if necessary Ask for medication adjustment</p>
Disclosure Support	Managing Classes	In-Person Supports
<p>Discussing pros and cons for disclosing to the university student services and others. Choosing: Whether to tell What to tell Who to tell When to tell How to tell How I will benefit Identify potential problems</p>	<p>Setting alarms Helping with time management Setting up study times Accessing tutor resources as needed Support with connecting with academic advisors Revisiting accommodation needs and access – (Changing seating, using headphones, recorders, books on tape, testing timeframes, changing formats, using cubicles/individual rooms, note taker, proctoring etc)</p>	<p>Learning to navigate and use library resources Finding admissions/registrations/financial aid/student services offices Help with purchasing books and supplies Finding restrooms, classrooms, study areas, computer center, learning/career centers, health center, quite safe places. In-person coaching, wellness support Ask for accommodation</p>
Next steps- Career	Support Network	
<p>Linking current course work to concurrent/future job search. Learning from and reframing current setbacks to inform future success in education and work. Looking for the next educational/work goals</p>	<p>Involve family and friends Facilitate meetings with VR Counselor Talk to treatment team about supports Involve Peer Supports Connect with campus support groups Connect with social supports/clubs on campus</p>	

## Individualized Pre-Enrollment Plan

**Name:** Click here to enter text.

**Date:** Click here to enter text.

<p><b>Long Term Goal:</b> Click here to enter text.</p> <p><b>Education Goal (in person's own words):</b> Click here to enter text.</p> <p><b>Level of Disclosure:</b> Click here to enter text.</p>			
Objective	Activities (include frequency)	Person(s) Responsible	Date started/completed
Click here to enter text.	Click here to enter text.	Click here to enter text.	Click here to enter text.
Click here to enter text.	Click here to enter text.	Click here to enter text.	Click here to enter text.
Click here to enter text.	Click here to enter text.	Click here to enter text.	Click here to enter text.
Click here to enter text.	Click here to enter text.	Click here to enter text.	Click here to enter text.



## Pre-Enrollment - Menu of Possibilities

Getting Established	Educational Resource Development and Exploration	Application
<p>Determine educational goal(s)            Fill out the career profile and discuss in depth each section            Explore concerns/ ambivalence about education            Discuss past experiences with education            Establish rapport and trust</p>	<p>Explore potential educational institutions and programs that may meet the educational goal (colleges, universities, online programs, certificate programs, apprenticeships, work study programs etc.)            Accompany the client while exploring different institutions            Determine the programs that best meet the educational goal(s)            Discover and gather what materials and information is needed to apply to the program.            Find references and contact info            Have identification needed</p>	<p>Turn in all relevant applications/resumes and associated materials (transcripts, letters of recommendation, personal essays, etc.)            Turn in FAFSA if appropriate            Discuss and plan for disclosure or non-disclosure            Reading appropriate policies and procedures</p>
Enrollment	Plan for Transportation	Support System/ Community Partners
<p>Financial planning            Registering with student services            Taking placement tests            Navigating school website and technology            Choosing classes            Familiarizing with college environment and resources            Purchasing books and supplies            Academic advising            Getting a student ID</p>	<p>Planning for transportation to classes.            Planning for transportation to other educational events (orientations, social events, clubs etc.)            Consider temporary transportation solutions to begin courses and for emergencies            Consider long term stable solutions that will last the length of course enrollment</p>	<p>Refer to Vocational Rehabilitation            Include peer community            Meet and include family and friends            Discuss plan with treatment team            Partner with Parole/Probation, Therapist/Counselor, and/or Mental Health Court etc. as appropriate</p>
Financial Aid/ Benefit Counseling	Barriers to Learning & Accommodations	Other Logistics
<p>Discuss options for paying for education (scholarships, grants, loans, work study, etc.)            Discuss pros and cons of going into debt            Discuss past loan defaults and deferment.            Discuss how benefits could be affected            Meet with family or rep payee</p>	<p>Determine an initial plan for addressing barriers to learning such as:            Addressing psychiatric symptoms            Coping with and accommodating learning/physical disabilities            Exploring strengths and resources that can be used to address barriers to learning.            Planning for anticipated needs - such as getting a tutor.            Finding a place to study</p>	<p>Obtaining child/elder care if needed            Lunch meals            Housing            Managing meds at school            Navigating class schedule</p>



# Individualized Pre-Enrollment Plan

**Name:** Ben FakeClient

**Date:** 1/5/2017

**Long Term Goal:** “Find and complete a degree allowing me to have a job in art.” Ben would like to learn more about careers and degrees in artistic fields that include some level of drawing or hands on aspect.

**Education Goal (in person’s own words):** “I want to try school, at the community college. I’d like to start in the spring and take an art class. I want to make it through classes and not leave when I am anxious like I did before I was home schooled.”

**Level of Disclosure:** Ben has signed a FERPA release and discussed pro’s and con’s of disclosure. He doesn’t want teachers, support staff, or other students to know his diagnosis. He did sign a ROI on 1/20/17 for disability services and he would like them to have access to all information. He is comfortable with staff and students knowing that he is a part of the SED program through the Mental Health agency. He doesn’t want to release to anyone that his father was in prison. We will continue to discuss Disclosure as we work with other departments.

Objective	Activities (include frequency)	Person(s) Responsible	Date started/completed
To explore the community college campus. Learn where support services are located.	<ul style="list-style-type: none"> <li>• Ben and EdS will walk around campus at least once to identify support services without being in a tour group.</li> <li>• Ben will attend a scheduled tour with a group.</li> </ul>	<p>EdS &amp; Ben</p> <p>EdS will assist Ben in scheduling a tour and go if Ben would like.</p>	<p>1/13/17- completed 1/16/17</p> <p>1/20/17- completed 1/20/17</p>
Learn about enrollment process	<ul style="list-style-type: none"> <li>• EdS will review steps for enrollment at the Community College</li> <li>• Ben will complete the admission application online</li> <li>• Ben and EdS will schedule an appointment to meet with an academic advisor to discuss options for possible classes and discuss placement testing.</li> </ul>	<p>EdS &amp; Ben</p> <p>Ben (EdS will assist if desired)</p> <p>Ben, EdS Academic advisor</p>	<p>1/26/17- First discussion on 1/26/17- will continue to discuss.</p> <p>1/26/17 Completed 1/26/17</p> <p>Called on 1/26/17 Apt on 2/9/17</p>
Assist with FAFSA and Financial aid process	<ul style="list-style-type: none"> <li>• Ben and EdS will make an appointment to meet with a TRIO advisor to review the FAFSA and needed documents.</li> <li>• Ben will connect with his mother regarding any information he may need to complete the FAFSA process.</li> </ul>	<p>EdS (will make the appointment and attend this meeting), Ben, TRIO advisor</p> <p>Ben &amp; his mother- Angela</p>	<p>Called on 1/12/17 Apt on 2/13/17</p> <p>After apt. information needed by 2/24/17</p>
Transportation	<ul style="list-style-type: none"> <li>• EdS and Ben will review bus schedules and routes to the community college.</li> <li>• Ben will try to ride the bus to meet EdS on campus once in the next month.</li> </ul>	<p>EdS &amp; Ben</p> <p>Ben</p>	<p>1/31/2017</p> <p>3/1/2017</p>

## Pre-Enrollment - Menu of Possibilities

Getting Established	Educational Resource Development and Exploration	Application
<p>Determine educational goal(s)            Fill out the career profile and discuss in depth each section            Explore concerns/ ambivalence about education            Discuss past experiences with education            Establish rapport and trust</p>	<p>Explore potential educational institutions and programs that may meet the educational goal (colleges, universities, online programs, certificate programs, apprenticeships, work study programs etc.)            Accompany the client while exploring different institutions            Determine the programs that best meet the educational goal(s)            Discover and gather what materials and information is needed to apply to the program.            Find references and contact info            Have identification needed</p>	<p>Turn in all relevant applications/resumes and associated materials (transcripts, letters of recommendation, personal essays, etc.)            Turn in FAFSA if appropriate            Discuss and plan for disclosure or non-disclosure            Reading appropriate policies and procedures</p>
Enrollment	Plan for Transportation	Support System/ Community Partners
<p>Financial planning            Registering with student services            Taking placement tests            Navigating school website and technology            Choosing classes            Familiarizing with college environment and resources            Purchasing books and supplies            Academic advising            Getting a student ID</p>	<p>Planning for transportation to classes.            Planning for transportation to other educational events (orientations, social events, clubs etc.)            Consider temporary transportation solutions to begin courses and for emergencies            Consider long term stable solutions that will last the length of course enrollment</p>	<p>Refer to Vocational Rehabilitation            Include peer community            Meet and include family and friends            Discuss plan with treatment team            Partner with Parole/Probation, Therapist/Counselor, and/or Mental Health Court etc. as appropriate</p>
Financial Aid/ Benefit Counseling	Barriers to Learning & Accommodations	Other Logistics
<p>Discuss options for paying for education (scholarships, grants, loans, work study, etc.)            Discuss pros and cons of going into debt            Discuss past loan defaults and deferment.            Discuss how benefits could be affected            Meet with family or rep payee</p>	<p>Determine an initial plan for addressing barriers to learning such as:            Addressing psychiatric symptoms            Coping with and accommodating learning/physical disabilities            Exploring strengths and resources that can be used to address barriers to learning.            Planning for anticipated needs - such as getting a tutor.            Finding a place to study</p>	<p>Obtaining child/elder care if needed            Lunch meals            Housing            Managing meds at school            Navigating class schedule</p>

## Scenario for SEd Tools - 2017 OSECE Conference

### **Intake/Setup:**

You recently received a Supported Education referral from a therapist, Jamie Imatherapist, for a client named Ben FakeClient. You have met with Ben three times and during these meetings you have been working on getting to know him as well as completing the Educational Assessment. Here are a few things to note about Ben and his interest in going back to school. For more details, refer to her Educational Assessment.

### **Pre-Enrollment Planning:**

Ben is interested in going to community college. Two years ago he graduated from high school from a home school setting. Ben described some negative experiences in public school and stated that his anxiety in the past has kept him from attending traditional school settings. Ben heard from his sister, who is in college now, that college is a very different environment than high school. Ben is interested in seeing the school, registering for a few classes, specifically an art class, and receiving support around navigating the enrollment process. Ben knows that he will need to complete a FAFSA and is anxious about this process as he doesn't know what paperwork he might need. Ben mentioned that his mother currently drives him to all of his appointments but he knows that he will need to learn how to ride the bus for school.

#### *Ask participants:*

- *Discuss disclosure.*
- *Show example of pre-enrollment plan.*
- *Who are some of the Educational Resources you might contact at the school?*
  - *Develop a few questions that you would ask that relate to the area of the Educational Resources expertize:*

### **Pre-Enrollment Planning Continued:**

You and Ben have now taken a tour of the campus and he is interested in attending next term. He has completed his FAFSA and will receive the full Pell Grant amount. Ben has been told that he will need to complete a placement test. He feels anxious about this since in the past he has needed a completely quiet space to take the test. Ben is interested to know what classes he might be able to take that first term. He would also like to explore different degrees, specifically those related to art. Ben has taken the bus once to meet you at the school but is worried about the timing of getting to classes. He currently doesn't have a bus pass or money to be able to ride the bus consistently.

#### *Ask participants:*

- *What would you add to the pre-enrollment plan?*
- *Who are some of the Educational Resources you might contact at the school?*
  - *Develop a few questions that you would ask that relate to the area of the Educational Resources expertize:*

### **Follow-Along Planning:**

It is spring term and Ben is now enrolled at the community college. You met with Ben the day after classes started and he said things were going well. You met him again at the library the next week and he still said things were going well. He is taking a free class that reviews how to navigate the college system and helps students narrow down career/educational goals. He is also taking writing 121 and an entry level art class. His classes go from 11am to 5pm on Mondays and Wednesdays. Now Ben is on his

second week of classes and explained that he is having difficulty with the commute because he doesn't have a place to put all his art supplies and lunch. He has shared that this week he is starting to fall behind in his writing class and might need extra time to finish his assignments. Ben stated that he skipped a writing class last week because he felt too anxious because he didn't complete his work. He said that he walked around the campus instead. He doesn't have another appointment with his therapist for three weeks and he is concerned that his anxiety will get worse. Ben said that his art teacher seems to favor those who have taken the class before or those who are art majors. He feels like he didn't receive great feedback around why he didn't get full credit on his last assignment in art.

*Ask participants:*

- *Start the Educational Experience Form.*
- *Develop a Follow-Along Support Plan for Ben.*

### **Transition Planning #1:**

Ben has now been in classes for a year and a term at the community college. He is working on an Associate of Arts Oregon Transfer (AAOT) degree in visual arts. At the pace Ben is comfortable in taking classes it will take him about another year to a year and half to complete. Last term you and Ben meet monthly to chat about school and how to navigate the system. Ben is doing really well in classes and has a 3.5 GPA. Over the last two terms he has joined a few groups/clubs on campus. Before this term he met with an academic advisor and financial aid before your appointment. He says that he feels like he knows who and when to contact someone on campus if he is having difficulty. He also joined TRIO and has a tutor for writing and an advisor to help him when he plans to transfer. You have discussed Ben's progress with his therapist, Jamie, who is now only seeing Ben monthly to keep him in SEd services. Jamie thinks it might be a good time to transition off Supported Education services.

*Ask participants:*

- *Have a conversation with Ben and complete the SEd Service Transition form.*
- *Complete the Educational Experience Form.*

### **Transition Planning #2:**

It is seven weeks into Ben's first term of school. He has just been released from being at the hospital for a week. Jamie and you coordinate a meeting during Ben and Jamie's sessions to discuss school. Ben would like to withdraw from his classes for this term. He feels overwhelmed with school and his home life. He would like to take a break from school and maybe try it again in a couple terms. He is willing to be involved in the withdraw process but is also nervous around explaining to school staff why he plans to withdraw. Jamie is supportive of Ben's decision but would like to encourage him to try school again in the near future.

*Ask participants:*

- *What are some next steps to make sure Ben can easily return to school in the future?*
  - *Would you discuss disclosure again? What questions might you ask Ben?*
  - *Who are the educational resources you might contact?*
    - *What are some of questions you might ask?*
- *Complete the Educational Experience Form.*
- *Have a conversation with Ben and complete the SEd Service Transition form.*

**Transition Planning #3:**

After a hard first term, Ben reviewed different degrees and short-term programs offered at the college. He decided to complete a one-year certificate in welding. Ben just graduated and is very excited about the artistic and practical side to this profession. He loves being able to use his hands to make something. Ben would like to find a job in a welding shop locally and then continue to do welding art on his free time. After you discussed the Supported Employment program, Ben is interested in working with a Supported Employment Specialist to help him find the right job. Jamie thinks this is a great idea and will keep working with Ben as he makes the transition from school to work.

*Ask participants:*

- *Complete the Educational Experience Form.*
- *Have a conversation with Ben and complete the SEd Service Transition form.*
- *How can you best coordinate services with Supported Employment?*

## Supported Education Services Transition Plan

You have decided to discontinue Supported Education (SEd) services. But remember that you are welcome to return to SEd if you think you would benefit from educational supports or career development in the future. This guide is meant to support your decision and help you to plan ongoing supports.

**What are your future plans? What is your short-term goal? What is your long-term goal?**

**If you had to make a big decision today, who would you call? Who have you called in the past?**

**Who can help with your educational goals?**

	Y or N	Name of Support(s) Preferred	Contact Information
My case manager			
My therapist			
My family			
My friend			
My significant other			
Clergy			
School Support Staff			
Financial aid advisor			
Teacher			
Other			

**Should we schedule a meeting with any of your supports to discuss the transition?**

**If you are in school, how often do you want someone to check in with you about your educational plan? Who should check in with you?**

**If you are leaving SEd unenrolled, when would be a good time to ask you about returning to SEd for help with education? Who should contact you?**



**How would you like to be contacted?**

- In-person (community)       In-person (job site)       In-person (agency)  
 Phone call       Text       Email

**What are some tools/coping strategies you use or have used in the past in the classroom to manage stress?**

**How would you know if you started to feel dissatisfied with your classes/major or that you were having other problems?**

**What are some reasons to re-connect to SEd in the future?\_(Help withdrawing from a class, help finding a new major, help advocating within the classroom, assistance with career development, financial planning, etc.)**

*Remember, that withdrawing or not attending classes can have an affect on your financial aid or loans. If you are unsure how this will affect you, contact a financial aid advisor to learn more.*

**Financial Aid contact information:** \_\_\_\_\_

Your signature/date: \_\_\_\_\_

SEd specialist signature/date: \_\_\_\_\_ Other signature/date: \_\_\_\_\_

# Supported Education Disclosure Form



Client Name: \_\_\_\_\_

Education Specialist: \_\_\_\_\_

Some people who use Supported Education services ask their Education Specialist (EdS) to talk to educational institutions on their behalf. The purpose of this form is to guide a discussion and client decision about whether or not, and to what degree, the Education Specialist can share individual information relevant to education with potential educational supports on campus.

Education Specialists often interact with school personnel and it is often known that Education Specialists work for an educational program at a mental health center. Sometimes this strategy helps people navigate the complex education system quicker. Further, if a person gets enrolled in school, the Education Specialist can be available to provide supports on campus.

Other people who use Supported Education services do not give the Education Specialist permission to talk to education institutions on their behalf. Instead, they may ask for help with find resources on campus, filling out school applications, discussing educational programs and careers, or other tasks that can help them find an educational program. People use this strategy when they don't want the educational system to know they are working with a Supported Education program.

Some people prefer to disclose to specific departments or people on campus with specific information. For example, someone might disclose their diagnosis to the Disability Services office and only disclose their enrollment in the Supported Education program with the Student Support office. Others might choose not to disclose to teachers or students but disclose limited information to TRIO or the Financial Aid Department.

Any option is fine. You should pick the strategy that feels most comfortable to you. It's also okay to change your mind at any time during pre-enrollment or after you have started school.

## **Discuss and note the pros (positive reasons to disclose) and cons (negative reasons, why you may wish not to disclose).**

Positive examples: EdS has a relationship with the school and can help navigate the school system; EdS can help me talk about mental health; EdS can help ask for what I need; provide support on campus, etc...

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Negative examples: Educators or other students may have stigma/prejudice against mental health; educators might think I am not capable; other students will look at me differently; special treatment in the classroom, etc...

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**Choose one:**

- Yes, I give my Education Specialist permission to share information relevant to my education to any department or staff.
  
- I want to discuss disclosing on a department or staff basis.
  
- No, I don't give my Education Specialist permission to disclose my information. However, I still want to hear about educational opportunities and navigation tips that might match my educational/career goals.

**Discuss and identify what information can be shared with specific departments or individuals:**

- **Examples of departments & individuals:** Accommodations/Disability Services Office, Student Support Services, Financial Aid, Teachers, Students, Academic Advisor, TRIO Advisor, etc.
- **Examples of Information:** Diagnosis, housing, criminal background, enrollment in SEd program, use of Mental Health services, etc.

Department or individual: \_\_\_\_\_  
Information to be shared: \_\_\_\_\_

---

Department or individual: \_\_\_\_\_  
Information to be shared: \_\_\_\_\_

---

Department or individual: \_\_\_\_\_  
Information to be shared: \_\_\_\_\_

---

Department or individual: \_\_\_\_\_

Information to be shared: \_\_\_\_\_  
\_\_\_\_\_

**Discuss and identify what information can not be shared with specific departments or individuals:**

- **Examples of departments & individuals:** Accommodations/Disability Services Office, Student Support Services, Financial Aid, Teachers, Students, Academic Advisor, TRIO Advisor, etc.
- **Examples of Information:** Diagnosis, housing, criminal background, enrollment in SEd program, use of Mental Health services, etc.

Department or individual: \_\_\_\_\_  
Information to be shared: \_\_\_\_\_  
\_\_\_\_\_

Department or individual: \_\_\_\_\_  
Information to be shared: \_\_\_\_\_  
\_\_\_\_\_

Department or individual: \_\_\_\_\_  
Information to be shared: \_\_\_\_\_  
\_\_\_\_\_

Department or individual: \_\_\_\_\_  
Information to be shared: \_\_\_\_\_  
\_\_\_\_\_

**FERPA:** Educational institutions have their own release of information called the Family Education Rights and Privacy Act (FERPA) and often the Disability Service Office will also have a separate release form. Please discuss the information that the educational institution will release to an Education Specialist if these other forms are signed.

Notes or information about the FERPA Release: \_\_\_\_\_

**SEd Participant Signature:** \_\_\_\_\_ **Date:** \_\_\_\_\_

**EdS Signature:** \_\_\_\_\_ **Date:** \_\_\_\_\_