

Supported Education Training Manual Draft

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Supported Education Training Manual

When consumers are polled about their preferences for mental health services, a majority request education services. Education conjures up opportunity, advancement, and reentry into the highly valued role of student. A degree or certificate is a ticket to a career that can lead to a promising future free from a lifetime of involvement in the mental health system.

The practice of Supported Education has been growing and developing over the past decades and is now designated as a promising practice by the federal government. Dr. Bruce Cuthbert, the Acting Director of the National Institute for Mental Health, has stated that both Supported Employment and Supported Education must become a priority for the federal government to support and fund. Recently, a comprehensive feasibility study was conducted to determine if a long-term multi-site research project will be funded, similar to the process that gained Supported Employment its evidence-based practice status.

New research regarding adolescents has found that when Supported Education services are provided early, they can prevent the debilitating symptoms and effects of a mental illness diagnosis. The value of Supported Education is being widely recognized through both anecdotal evidence and scientific studies and its practice is spreading.

Although Supported Education practice has lagged behind the development of Supported Employment, it has been a process whereby many participants have been able to improve their employment status and move beyond entry level and part-time jobs. Oregon has been proactive in developing Supported Education services with three programs established in 2008, and a fourth in 2013. Other Supported Education services have been integrated into the Individual Placement and Support (IPS) model of Supported Employment (SE). However, a reliable and consistent funding source has limited the development of Supported Education programs throughout the state.

Recent revisions in the Medicaid code had opened the door for expansion. A modifier is now available to use with Medicaid Supported Employment to denote Supported Education service provision. With these new resources available, Oregon is ready to move forward to expand and grow Supported Education programs and services by integrating them into the Individual Placement and Support model along with Supported Employment.

The definition of Supported Education is:

Helping people with mental illness participate in an education program so they may receive the education and training they need to achieve their learning and recovery goals and become gainfully employed in the job or career of their choice.

The definition guides all aspects of practice. It defines to whom the service will be provided, what the service is, why the service is being provided and what the expected outcomes will be. If the population or the activities do not fall within the mission statement, they may not be appropriate for the program.

The Principles of Supported Education

The principles of Supported Education are similar to the principles of IPS and provide guidelines for implementation and integration of the two services, along with Supported Employment.

The similarities are:

Supported Education Principles	IPS Supported Employment Principles
Eligibility is based on client choice	Every person who wants to work is eligible
Services are community-based	Competitive jobs are the goal
Supported Education is integrated with mental health treatment	IPS SE is integrated with mental health treatment
Supported Education starts soon after person expresses interest	Personalized benefits counseling is provided
Individualized follow-along supports are ongoing	Rapid job search
Individual preferences guide services	Systematic job development
Supported Education is strengths focused and promotes hope, and recovery	Individualized follow-along supports are time-unlimited
	Individual preferences are honored

The first principle of IPS SE not reflected in the Supported Education principles above is: “Competitive jobs are the goal.” That principle is reflected in the definition of Supported Education. Another principle of IPS SE, “Personalized benefits counseling is provided,” is also not reflected in the Supported Education principles. However, its equivalent, financial aid planning, is an integral part of Supported Education services.

An additional principle of Supported Education, “Supported Education is strengths focused and promotes hope and recovery,” reflects the emphasis of education on achievable goals and recovery.

The Supported Education principles are explained below:

1. Eligibility is based on client choice.

All clients interested in education have access to Supported Education services regardless of educational readiness factors, substance abuse, symptoms, and history of violent behavior, cognition impairments, treatment non-adherence and personal presentation.

2. Services begin soon after the person expresses interest.

The first meaningful education activities occur within 30 days of enrollment into the Supported Education program. Meaningful education activities could include a tour of the campus, applying for financial aid, or meeting a department leader (among others).

3. Supported Education is integrated with services.

To ensure the integration of Supported Education with both Supported Employment services and mental health treatment, Supported Education Specialists are part of an integrated treatment team. Both Supported Education and mental health treatment are documented in a single chart, and the Education Specialist regularly attends team meetings, as well as communicates with the treatment team.

4. Individual preferences guide services.

The role of a Supported Education Specialist is to assist the client to discover and articulate their education and career preferences and then to provide the services that will help them realize those education goals.

5. Individualized follow-along supports are ongoing.

Follow-along supports are available as long as the client is actively pursuing their education goals. The level of support is geared to the client's needs and may decline over time as they reach their education goal. Supports are intended to continue if a client's educational goals change.

6. Services are community-based.

Education services are provided in a natural community setting, such as the college campus, the majority of the time.

7. Supported Education is strengths focused and promotes hope and recovery.

Supported Education concentrates on clients' strengths and building for the future. Inherent in this principle is the idea that recovery and hope for the future is pragmatic and achievable. For integrated SE/SED programs, education goals should be linked to employment outcomes.

Supported Education Program Supervision and Staffing

Supported Education is a service provision that requires special skills and orientation. Although recruitment, intake, engagement, goal setting and follow-along supports are skills needed by all practitioners, the emphasis on education requires a special interest and orientation and a firm belief that clients can learn and be successful in an education environment. A thorough knowledge of the education system, including financial aid, the procurement of accommodations and the rights and responsibilities of the student is necessary. The Education Specialist must be an advocate for the client both within the mental health system and the postsecondary institution with the goal of helping the student reach their personal education goal.

In rural communities with small client populations, it may not be possible to have both an Employment Specialist and an Education Specialist, so the position may be combined. However, a dedicated position or positions in a stand-alone program is recommended due to the specialized knowledge required for education interventions. For communities with large client populations, the number of Supported Education Specialists should reflect the client population. If that is not currently possible, developing

greater capacity for providing Supported Education services and a Supported Education unit should be the goal.

Supported Education Supervisor

The duties of the Supported Education Supervisor are to assure that all services related to Supported Education are delivered in a manner that reflects the principles of Supported Education within the guidelines provided by the agency. The supervisor provides individual and group supervision to the Education Specialist and facilitates the integration of Supported Education services with the IPS SE model. If Supported Education is integrated with Supported Employment, the supervision may be combined. The purpose of the supervision is to develop and improve the staffs' skills.

The duties of the supervisor include:

- Weekly Supported Education/Supported Employment supervision designed to review client situations and identify new strategies and ideas to help clients meet their education/employment goals.
- Communicate with mental health services supervisors to ensure that services are integrated, to resolve programmatic issues (such as referral process or transfer of follow-along to mental health workers) and to be a champion for the values of work/education.
- Accompany Supported Education Specialist/s who are new or having difficulty with their skills into the field monthly to improve skills by observing, modeling, and giving feedback on skills. (For example, accompany student to the student services office to discuss accommodations).
- Reviews current client outcomes with Education Specialist/s and sets goals to improve program performance at least quarterly.
- Track education outcomes measures (number of students enrolled, classes taken and completed, class grades, etc.) and goal achievement at least quarterly as indicated by school schedules.

Integration with the Treatment Team

To ensure integration of Supported Education with both Supported Employment services and mental health treatment, Supported Education Specialists will be part of an integrated treatment team.

Being a part of the treatment team will facilitate referrals between Supported Education and Supported Employment based on the client's preference and readiness. Treatment goals can be coordinated with Supported Education services throughout the process as the client works to reach their education and employment goals.

If a treatment team member, case manager, Employment Specialist or other provider makes a referral to the Supported Education Specialist, the referring person will meet with both the client and the Supported Education Specialist. The purpose of the team meeting with the client present is to help the Education Specialist develop a rapport with the client, to develop a sense of a team, and for the referring clinician to provide any additional information that might be helpful regarding the educational goal.

To facilitate frequent team member contact Supported Education Specialists:

- Will participate in weekly mental health treatment team meeting, that discussed individual client education goals with shared decision making,
- Be located in close proximity to or share office space with their mental health treatment team members,
- Document mental health treatment and education services in a single client chart,
- Encourage referrals for clients who have not yet been referred to Supported Education.

The Supported Education Specialist

The key to the success of a Supported Education program is the support given to the student as they navigate the education system and prepare themselves to take on the role of student. Although clients often express an interest in returning to school, it can be daunting to go it alone. Beginning with intake, through engagement and recruitment, education should be a continuous topic for discussion with the clients. By exploring the client's dreams and preferences, they can begin to see a new role for themselves beyond that of a mental health client.

Once the student has decided to return to school, choosing an education goal, enrollment and completing classes are the next steps. The Education Specialist provides support and encouragement throughout the whole process, acting as coach and cheerleader as well as facilitator. Support continues until the student has completed their education goals, or moved on to other activities or experiences.

Skills needed by the Education Specialist include motivational interviewing combined with good interpersonal skills to work with and advocate for the clients, and to work collaboratively with the treatment teams of the agency. A thorough knowledge of the mental health system, the community, and education resources that will support the student as they attend school is also required. Finally, the Education Specialist must be able to understand the systems within the education institution and to be able to develop and maintain relationships with key personnel such as the student services staff, the financial aid office and the Career Resource Center.

A detailed job description for the Supported Education Specialist might include the following:

- Develop marketing, recruitment and referral strategies.
- Assist clients with registration, financial aid and other education institution requirements as needed.
- Establish education goals with clients.
- Assess client's strengths, and learning and resource needs, to meet education goals.
- Develop implementation plans for clients including support and accommodation requirements.
- Monitor progress of clients and modify plans as needed.
- Provide support and assistance to clients.
- Advocate and negotiate for clients in both education and mental health settings.
- Develop peer support services.
- Participate in weekly treatment team meetings.
- Participate in evaluation and fidelity procedures.
- Participate in education and training seminars and conferences for disseminating Supported Education practices.

Specialized services requiring unique knowledge and skills such as tutoring and benefits counseling may be provided by other providers within the agency, at the college, or by an outside provider. If a peer has the position of Supported Education Specialist, it is recommended that the peer have appropriate training and demonstrate some level of employment and education achievement.

Recruitment/Intake/Engagement

Many clients express an interest in education but unless they become actively engaged in a process they may never act on their desire. The recruitment, intake and engagement processes are designed to bring potential students into the Supported Education program so they can actively pursue their education and improve their employment prospects.

Recruitment

Agency staff and Supported Education Specialist regularly and frequently talk with all clients about education. Include the following:

- Ask if the client has ever thought of education as an option for themselves
- Discuss how it might be a possibility for them
- Discuss pros and cons of returning to school
- Discuss possible education goals
- Discuss the student role as a normalizing and meaningful experience
- Tie education to employment opportunities
- Explore how peers might share information about supported education

To bring clients into the education program, the agency promotes education through multiple strategies. In addition to including questions about the client's interest in education at intake, the agency will also:

- Include questions about interest in education on all annual (or semi-annual) assessment of treatment plan reviews.
- Display posters, brochures and bulletin boards promoting Supported Education and Supported Education services in the agency lobby and other waiting areas.
- Supports ways for clients to share education stories with other clients and staff (e.g. agency-wide education events, in-service training, peer support groups, agency newsletter articles, invited speakers at treatment groups etc.) at least twice a year.
- Share education outcome information with agency leadership and staff to demonstrate program success.

All staff training about the Supported Education program is helpful to encourage referrals to the Supported Education Specialist, either by individual practitioners or through treatment teams. Self-referrals by clients to the Supported Education Specialist directly or by referral through their case manager are encouraged and supported.

Intake

The intake process is similar for potential Supported Education participants as it would be for any other person beginning any service provided by the agency. The intake process, with the inclusion of questions about the clients' interest in education, is written into the intake forms and into the policies and procedures of the agency.

Engagement

Assertive engagement and outreach with new referrals will include phone, text, email, mail and/or community visits. Ideally, a first meeting with the client will occur with the referring clinician and the Education Specialist. Individuals seeking Supported Education services receive their first contact by the Supported Education Specialist within one week of referral and have one concrete activity completed within one month of referral.

Zero exclusion criteria

All clients interested in education will have access to Supported Education services regardless of readiness factors, substance abuse, symptoms, history of violent behavior, cognition impairments, treatment non-adherence and personal presentation. Clients are not screened out formally or informally.

Choosing an Education Goal and Program

Choosing an education goal is an evolving process that may occur over an extended period of time. As the new student gains experience, the goal to complete an education and move into employment that reflects their new knowledge and skills will become clearer. However, it is important to have a starting point and a tentative roadmap.

The Educational Assessment

The initial education assessment is designed to give a clear picture of where the client is now. It occurs over 2 – 3 sessions soon after the student expresses interest in returning to school. It reviews past education attainment and experiences including the successes and problems. It identifies current interests and preferences and discusses available resources and resources needs.

The education assessment and initial interviews provide information from which to determine the kind of education program most appropriate (adult education, GED, postsecondary, training, apprenticeship programs etc.) for the client and to begin the development of an Individual Education Service Plan. The education assessment might include, but not be limited to, the following:

Education Assessment

- Educational background/history
- Employment history
- Education interests
- Strengths/skills/talents related to pursuing an education goal
- Resources/sources of support for returning to school
- Need for accommodations
- Education financing
- Transportation and other resource needs
- Barriers to learning
- Other barriers to completing education
- Other factors that might affect success
- Disability related information such as diagnosis, medical problems, medications, and symptoms

(Note: Supplemental Tools Section A includes an adapted Career Profile which includes essential educational assessment information as well as the traditional information gathered on the Vocational Profile. The Career Profile can be used in place of the Vocational Profile and can also serve as an Educational Assessment.)

With each new educational experience, an education assessment will be updated to include preferences, education experiences, barriers to learning, skills and resources needs, natural support, etc. as indicated above.

Choosing an Education Goal

In addition to personal exploration with the Supported Education Specialist, there are resources available on campus including career development classes and career seminars and fairs. Many campuses have Career Development Centers that are available to all students. Additional resources may be available through the agency's Supported Employment program.

An education goal may include some of the following:

- Exploratory class
- Activities courses
- Upgrade basic skills
- Upgrade job related skills
- GED
- Associates degree
- Four-year degree
- Masters/Doctors degree
- Vocational/technical certificate
- AA/AS Vocational Tech major
- Maintain certificate/license
- Transfer to another college

The Supported Education goal statement should:

- reflect the client's preferences
- include a long-term goal with a target completion date
- include short-term goals and timelines

Here is an example of a student's goal for becoming a career counselor:

I will graduate with a B.A. Degree in career counseling in six years. By next year I will have completed the first year basic math and English requirements. In three years I will have my AA Degree in Liberal Arts. During that year, I will begin the process of transferring to a four-year college where I will complete my B.A. Degree.

There are practical implications that must be considered in setting an education goal. A final step in the goal setting process is to continue to evaluate the feasibility of the goal. Here are some questions to consider:

Practical Considerations for the Education Goal

- How much training or education is required?
- Can I meet the program admission requirements?
- How long will it take to get the degree or certificate I want?
- Is there flexibility in the program and/or timelines for completion?
- How much will it cost?
- Am I willing to go into debt?
- Do I have the support of friends, family and professionals?
- Will I be able to work in the job given the particular disabilities I have and/or the accommodations I need?
- Do I have the stamina and determination required?
- Are there job opportunities in my geographical area for this work?

Individualized Pre-Enrollment Planning

Individualized Pre-Enrollment Planning will include an education goal and describe a process for pre-enrollment educational activities. Examples of these activities include: campus orientation, taking placement tests, applying for financial aid, applying for accommodations, enrolling in class, purchasing books and supplies, arranging for transportation and maintaining an acceptable grade point average. Each of these may have sub goals and timelines. The Individualized Pre-Enrollment plan should be updated as activities are completed.

(Note: An example form to document Individualized Pre-Enrollment Planning is included in Supplemental Tools Section C. The example includes a narrative educational goal plan form and a general educational goal attainment form.)

Education Resource Development

To fulfill the education goals of the clients, the Education Specialist will be familiar with the education institutions and programs within the community. Supported Education Specialists will initiate and/or will have developed working relationships and have frequent contact with student services staff, financial aid staff, academic advisors, counselors, scholarship programs and other appropriate education personnel.

In addition to colleges and universities, certificate programs, training programs, apprenticeships and work study programs should be explored, giving the client the widest possible choice for meeting their goal. The Education Specialist will also meet with Vocational Rehabilitation Counselors as appropriate.

The Education Specialist will be aware of changing administrative requirements, financial aid requirements, enrollment procedures and any other details that affect the students participation in the education program. To do so, they will continue to meet with personnel within the education program to keep current on policy and procedure changes.

Education Specialists will have scheduled face-to-face meetings with education institutions and/or program staff and/or Vocational Rehabilitation Counselors at least monthly and have client related contacts (phone, e-mail, in-person) weekly to discuss shared clients and referrals. Each Education

Specialist makes at least 6 face-to-face educational resource contacts per month, on behalf of clients seeking to participate in education programs.

(Note: An example visit planning guide for reaching out to educational programs and resources is included in Supplemental Tools Section G. Additionally, a guide for developing a Memorandum of Understanding between an agency and educational institution is included in Supplemental Tools Section H.)

Education and Community Resource Referral

In addition to knowing education and community resources, the Supported Education Specialist should not simply refer students to those resources, but accompany them as needed. Students may be overwhelmed with information and leave an office confused and frustrated about what to do next. One of the primary functions of the Supported Education Specialists is to accompany the student to the resource, help them gather the needed information, and then go through the information with them to help them understand the information and what they need to do next. Teaching and coaching builds the relationship with the client, as well as develops the client's skills and confidence.

Community-based Natural Services

Education Specialists will assist clients to participate in programs that are open to the entire community and are not limited to people with disabilities or people with severe mental illness. Education services such as engagement, linkage to educational settings and follow-along supports are provided in natural community settings by Education Specialists. Ideally, 60 percent of the Education Specialist's scheduled work hours, dedicated to education, are spent in the community.

Enrollment in a Supported Education Program

Enrollment in a Supported Education program includes the following:

- Completing an application for admittance
- Financial planning
- Registering with the student services office
- Taking placement tests
- Choosing classes
- Becoming familiar with the college environment and resources
- Purchasing books and supplies
- Planning transportation and other resource needs

(Note: Supported Employment Specialists often track new job attainment and job terminations through use of the Job Start and Job End forms. For Supported Education clients, an alternative to these forms is included in Supplemental Tools Section D labeled the 'Educational Experience Report' form. The Educational Experience form tracks initial enrollment, dropout, withdrawal, and graduation status as well as lessons learned.)

Application for Admittance

Application processes vary according to the education program. For a community college or an apprenticeship or a training program, the application may be fairly simple. For a university, the application process may be complex requiring transcripts, letters of recommendations, and a personal essay. Consult the college catalogue or the admissions office for details.

(Note: Checklists for the Application Process, College Registrations, Disability Services, Orientation Materials, and Reviewing Educational Policies and Procedures are included in Supplement Tools Section I.)

Financial Planning

All clients are offered assistance in obtaining comprehensive, individualized, education planning before beginning an education program. All forms of financial aid will be explored including assistance with applying for the Free Application for Federal Student Aid (FAFSA), federal grants, work/study programs, scholarships and loans. Assistance will also be provided to clients who may have defaulted on student loans or be in need of assistance in repaying a loan.

(Note: See Attachment B for additional information on loan, deferments and loan forgiveness.)

Additional financial planning may include the effect of SSA benefits, medical benefits, medication subsidies, housing subsidies, food stamps, spouse and dependent children benefits, and any other source of income on educational financial planning. For those clients who both go to school and work, assistance will be given in making decisions about work hours and pay. They will be assisted in provided information and reporting earnings to SSA, housing programs, VA programs, etc., depending on the person's benefits.

Financial aid is available for students whose resources are inadequate to meet their educational expenses. Aid is based on a partnership between the student, the postsecondary educational institution, the states and federal government, and available private resources. The need for aid is determined by the difference between the costs of education (such as tuition, books, living expenses, etc.) and the amount of money the student has. The larger the difference between these two, the more financial aid may be available.

Although funds for consumers to attend adult basic education classes or to study for the GED may be available through community resources that are unique to each locale, the emphasis of this section is on obtaining financial aid for postsecondary education. Financial aid includes the following:

- Grants
- Work study programs
- Loans
- Scholarships

While these funding sources are the same as those available for all students, some resources are earmarked for students with exceptional need. For example, students with mental illnesses may apply for resources through the Social Security Administration and the Division of Vocational Rehabilitation.

(Note: A Checklist for Financial Aid Application is included in Supplemental Tools Section I.)

Free Application for Federal Student Aid (FAFSA)

Most students applying to a postsecondary education program will apply for financial aid. Almost without exception this will require completing the Free Application for Federal Student Aid (FAFSA). Applying for aid through the FAFSA doesn't cost students anything. It is critical that students apply for

financial aid as soon as they decide to return to school. Awards are often based on availability and students who apply later run the risk of decreased funding.

As part of the FAFSA application students must provide documentation to verify their disability. Depending on the institution, documentation may be a written statement from a qualified professional such as a psychiatrist or Vocational Rehabilitation Counselor. To be certain what is required, students should check with the financial aid office.

Disability related expenses which are covered by other assisting agencies cannot also be covered by financial aid from schools. For example, if students receive Vocational Rehabilitation services and the agency funds the costs of tuition and books, schools will not consider those expenses in determining financial aid.

To use the FAFSA website, a student must first apply for a personal identification number (PIN). The students' personal financial aid information will be only be accessible using the PIN or a 4-digit number in combination with the students' Social Security number, name, and date of birth. This information identifies the user who has the right to access personal information. The security of the PIN is important because it can be used to do the following:

- Electronically sign federal student aid documents;
- Access the personal records; and
- Make binding legal obligations.

After completing a FAFSA application online, students and parents (if students are classified as dependent students) must sign it. The FAFSA cannot be processed until it is signed. Using a PIN to sign the FAFSA electronically is the fastest and most reliable way. However, you can also print the form, sign it on the signature page, and mail it, or you can provide a signature on the paper Student Aid Report (SAR). See the Federal Student Aid PIN website at <http://www.pin.ed.gov> to apply for the PIN.

Students must reapply for financial aid each year through the Renewal FAFSA. This form may include preprinted information from the initial application, spaces to correct that information, and other specific questions that must be answered each year. Federal grants are the primary source of funding available for disabled or disadvantaged students. They include Pell Grants and Federal Supplemental Educational Opportunity Grants.

Pell Grants

Pell grants are awarded to undergraduates who have not earned a bachelor's or professional degree. They do not have to be repaid.

To qualify, students must complete a financial aid application (FAFSA) and demonstrate that the cost of the education exceeds their ability to pay. The amount received will depend on the cost of going to school, students' resources, whether they are full-time or part-time students, and whether they attend school for a full academic year.

The maximum award varies from year to year. The maximum Pell Grant for the 2017–18 award year (July 1, 2017, to June 30, 2018), the maximum award will be \$5,920, but it varies per year. The amount depends on the student's financial need, costs to attend school, status as a full-time or part-time

student, and plans to attend school for a full academic year or less. Contact the Financial Aid Office to determine the amount available to individual students.

Students may not receive Federal Pell Grant funds from more than one school at a time. Financial need is determined by the U.S. Department of Education using a standard formula, established by Congress, to evaluate the financial information reported on the FAFSA and to determine the expected family contribution (EFC).

The fundamental elements in this standard formula are the student's income (and assets if the student is independent), the parents' income and assets (if the student is dependent), the family's household size, and the number of family members (excluding parents) attending postsecondary institutions. The student's award is the sum of:

- (1) a percentage of net income (remaining income after subtracting allowances for basic living expenses and taxes)
- (2) a percentage of net assets (assets remaining after subtracting an asset protection allowance).

Different assessment rates and allowances are used for dependent students, independent students without dependents, and independent students with dependents. After filing a FAFSA, the student receives a Student Aid Report (SAR), or the institution receives an *Institutional Student Information Record* (ISIR), which notifies the student if he or she is eligible for a Federal Pell Grant.

Federal Pell Grants are direct grants awarded through participating institutions. Participating institutions either credit the Federal Pell Grant funds to the student's school account, pay the student directly (usually by check) or combine these methods. Students must be paid at least once per term (semester, trimester, or quarter); schools that do not use formally defined terms must pay the student at least twice per academic year.

Federal Supplemental Education Opportunity Grants (FSEOG)

FSEOG are another federal gift-aid program for undergraduates with exceptional financial need. Pell Grant recipients with the lowest Expected Family Contribution will be the first students to get FSEOG.

A student may receive from \$100 to \$4,000 a year. Amounts may vary by year depending on when they apply, their financial need, and the funding level of the school. Money from a FSEOG is dispersed in the same manner as Pell Grants and also does not need to be repaid.

Students should know that if they leave school during the term or drop one or more classes, they might have to repay the grant money in part or in full.

Sometimes part-time students have been denied financial aid because they do not carry the requisite number of classes. According to a ruling by the U.S. Department of Education, Southwest ADA Office of Civil Rights, Complaint #04-95-2114, regarding the State University System of Florida (1997), the University System may not, on the basis of disability, provide less assistance to people with disabilities than is provided to those without disabilities. Therefore, the University System had to award grant assistance to students who are carrying fewer than 12 credit hours as an accommodation for a disability and who otherwise met the eligibility criteria for the grant, regardless of whether the students are enrolled as full-time or part-time.

The Federal Work Study Program (FWS)

The FWS provides part-time jobs for undergraduate and graduate students with financial need, so they may earn money to help pay educational expenses. The program encourages on-campus or community service work and work related to students' course of study.

FWS students are paid by the hour. Their wages must be at least the current federal minimum wage, but may be higher depending on the type of work done and the skills required. When assigning work hours, employers or financial aid administrators will consider students' total award amount, their class schedule, and their academic progress.

If students work on campus, they will usually work for the school. If they work off campus, employers may be private, nonprofit organizations, or public agencies. The work performed must be in the public interest.

Scholarships

Scholarships are part of the financial aid package that may be offered to undergraduate students through the FAFSA application process. Most postsecondary institutions have their own scholarship programs in addition to those available through state and federal funding. Some states may also grant tuition waivers for students who qualify as low-income students.

Libraries often have resource books with detailed information about scholarships. You can find additional sources of scholarships through Scholarship Search Services on the Internet. Three are Fastweb, GoCollege, and FastAid. Consult <http://www.heath.gwu.edu> (HEATH at George Washington University) for disability related scholarships.

The National Alliance on Mental Illness (NAMI) website also lists scholarships specifically for people with psychiatric disabilities. Look on the homepage <http://www.nami.org> for *NAMI on Campus*.

Eli Lilly and Company offers scholarships to help people diagnosed with "schizophrenia, related schizophrenia-spectrum disorders or bipolar disorders to acquire educational and vocational skills necessary to reintegrate into society, secure jobs, regain their lives, and realize their full potential." You can download applications on The Center for Reintegration website: <http://www.reintegration.com>

Eligibility Programs

Eligibility programs are programs that people must qualify for based on need. Two sources for eligibility

programs that are available to consumers are the Division of Vocational Rehabilitation and the Social Security Administration. To receive services, students must meet eligibility requirements that include verifying disability and need. Each agency has different requirements.

Consumers who are qualified to receive Vocational Rehabilitation (VR) services must prepare an Individualized Employment Plan (IEP) with the VR Counselor. The IEP includes developing an employment goal, identifying the services and resources needed to meet the goal, and identifying the service providers. If it is determined in the goal-setting process that returning to school is a necessary step to reaching the employment goal, VR may assist consumers with their education by providing assistance for tuition, transportation, books, or other aids that have been included in the IEP. Services may differ from state to state.

Postsecondary educational institutions' Office of Financial Aid and VR work closely together to determine the aid that will be available to individual students. Because both VR and the colleges receive federal money, service dollars cannot overlap. Contact the VR office in the local area for more information.

The Social Security Administration (SSA) provides benefits to people if they have a verifiable disability. Those who qualify receive cash benefits, Supplemental Security Income (SSI) or Social Security Disability Insurance (SSDI), and federal health insurance (Medicare/Medicaid).

While Social Security benefits are typically reduced by other income, the Plan for Achieving Self-Support (PASS) allows consumers who are eligible for SSI and, in some cases SSDI, to set aside money from work or savings to help them achieve a work goal.

If consumers want to return to school, they may use the plan to pay for tuition, fees, books, and supplies that are needed for school or training. The money set-aside will not reduce the SSI benefit and does not count against the resource limit.

The PASS program is designed to help students acquire the items, skills, or services needed to compete in a professional, business, or trade environment. Therefore, the goal of the PASS program must be to have a job that will produce sufficient earning to reduce dependency on SSI payments. Contact the Social Security office in the local area for more information or go to:

<http://www.ssa.gov/disabilityresearch/wi/pass.htm>

Students who are Veterans, or are the spouse or dependent of Veterans, may be eligible for educational benefits. For details, go to: **<http://www.gibill.va.gov>**

Although the federal government is the largest source of student financial aid, other sources are available. The higher education agency of each state has information about state aid, including aid from the State Student Incentive Grant (SSIG). It is jointly funded by individual states and the U.S. Department of Education. Contact the college Financial Aid Office for information.

The AmeriCorps program provides full-time educational grants in return for work in community service. Students can work before, during, or after they complete their education. Students can use the funds to either pay current educational expenses or repay federal student loans. Go to:

<http://www.americorps.org>

Student Loans

Unless students are in the last semesters of completing their degree or certificate and are confident of getting a job in their chosen field, student loans may be a problem. Repaying them can be difficult and many students desiring to return to school may not be able to receive financial aid because of a loan default. Although there are avenues for loan forgiveness or adjusting repayment plans, they are extremely difficult to acquire. Collection agencies are persistent and thrive on student loan collections, even from their most vulnerable clients.

Accommodations and Disclosure

Clients who are returning to school may experience problems with anxiety, concentration, memory, or other functional limitations caused by their illness. To level the playing field with their peers without disabilities, some accommodations are available to help consumers perform more effectively. Supported Education Specialists provide clients with accurate information and assist them in evaluating their choices to make an informed decision about disclosing their disability in order to receive accommodations. Accurate information regarding student rights includes the following:

- Legal rights to accommodations
- Eligibility for accommodations
- Types of accommodations
- Documenting the psychiatric disability
- Disclosure

Legal Rights to Accommodations

Accommodations are changes in educational tasks, requirements, or environmental access, which allow people with disabilities to have the same chance of success as people without disabilities. Accommodations must be made available to those who qualify for them because of the Americans with Disabilities Act (ADA) states that those who can verify a disability that limits their functioning are entitled to reasonable accommodations.

A student must meet both the *academic* and *technical* standards of an institution for admission. Technical standards are “all nonacademic admission criteria that are essential to participation in the program in question.” Depending on the program, these standards might include physical or mental health requirements. Although students may meet the academic standards, Title II and III of the ADA refer to the rights of an institution to exclude an individual from participation in its program of activities for health and safety reasons.

However, the law states: All campuses, by law, must have an office or designated person who is responsible for the ADA. This individual or office, usually called the Student Services Office, Office of Services for Students with Disabilities or “Disability Services” has the ongoing responsibility for ensuring that policies and procedures developed and employed by the academic institution do not discriminate against students with disabilities.

A grievance procedure must also be in place for resolving complaints. If a student believes that they have been unlawfully discriminated against, they should contact this office for information about the institution’s grievance procedures. They may also file a complaint with the regional Office of Civil Rights.

Information about these and other services should be readily available in the student handbook.

Eligibility for Accommodations

A student must establish eligibility before accommodations can be received. Contact Student Services before enrolling to determine the kinds of services available. If students choose to disclose their psychiatric disability and register with Student Services, the staff will determine their eligibility for accommodations. Registering early facilitates the process so the student's needs are addressed before classes begin. The legal definition of a disability is defined below.

The definition of a disability is (1) a physical or mental impairment that substantially limits one or more of the major life activities of an individual, (2) has a record of such an impairment or (3) is regarded as having such an impairment.

To be defined as a disability, the impairment must result in a substantial limitation of one or more life activities such as caring for one's self, performing manual tasks, walking, seeing, hearing, speaking, breathing, learning, and working. The ADA defines mental impairment as "a physiological disorder or condition... affecting one or more of the following body systems neurological, musculoskeletal, and/ or...special sense organs."

Types of Accommodations

Accommodations are made based on students' *functional limitations*, which is a legal term for issues related to performance. For example, if consumers have difficulty concentrating, (the functional limitation), the accommodation might be to use a tape recorder in class. Such an accommodation would allow clients to review the class lectures and take notes at their own pace. However, accommodations cannot be given to consumers unless they disclose and verify their disability.

Following are some common examples of accommodations for students with mental illnesses:

- Using digital recorders in the classroom
- Using books on tape, audio downloads, or other technology
- Modifying testing formats or time parameters
- Changing the test site
- Changing timelines for assignments or tests
- Changing format or methods of completing assignments
- Using cubicles, headphones, or individual rooms during tests
- Taking beverages to class
- Changing seating
- Issuing special parking permits

Following are some examples of accommodations to address a specific problem:

Problem	Accommodation
Concentration	Digital recorder
Note taking	Digital recorder, note taker
Test anxiety	Individually proctored test in quiet place
	Extra time to complete test
Unable to take essay test	Change test format (multiple choice, record thoughts)
Easily distracted	Digitally record class, audio files
Performance anxiety	Written assignments rather than spoken
Anniversary dates that cause problems	Flexible times for assignments
	Assignments given in advance
Short attention span	Digital recorder, books on tape, audio files
Extreme restlessness	Leaving class for breaks
Anxiety about parking	Special parking permits
Dry mouth	Having beverages in class

Changes in Program Requirements or Policy

Some students with disabilities require changes in program requirements so they can complete their course of study and graduate. Examples of a modified program requirement might include a course substitution such as logic for math or a sociology or anthropology class for language.

To receive this type of accommodation, students must verify a functional limitation that warrants the program change. The change cannot substantially lower the standards for or fundamentally change the program or curriculum. There is no guarantee that institutions will agree with student's need and grant the substitution. A program administrator may believe the program requirements are necessary to maintain the academic standards of the college.

Other students might require accommodations related to policy. These changes might include granting students part-time status and extending that status as necessary or allowing incomplete rather than failing grades if students require a medical withdrawal due to hospitalization.

Accommodations are made and services given on an individual basis. Each student's needs are unique and what might solve a problem for one student may not suffice for another. Because one consumer gets a certain accommodation does not necessarily mean that others will get that same accommodation. Work collaboratively with the Student Services Counselor to assess and determine consumers' needs.

Documenting Psychiatric Disability

A disability must be documented for consumers to receive accommodations or other disability services. Documentation can be obtained from a licensed medical or mental health worker or a previous record from a Vocational Rehabilitation Office or a high school. Documenting disability for the purpose of providing accommodations must both establish disability and provide adequate information about the functional limitations of the disability so that effective accommodations can be identified.

Documentation should give the Student Services staff a basic understanding of a client's disability and enough information to anticipate how the current impact of the disability is expected to interact with the institution's structure of courses, testing methods, program requirements, etc. It is helpful to suggest the needed accommodation if the student services staff is not familiar with the functional limitations of a student with a psychiatric disability.

Disclosure

For clients to receive accommodations, they must be willing to disclose their mental illness to the Student Services staff. Some consumers are reluctant to tell anyone on campus that they have a disability. Even though they may have trouble in their classes, they are afraid they will experience discrimination if they disclose the diagnosis. Such fears are based in reality. While some campuses and campus personnel are open and welcoming to students with psychiatric disabilities, others still have reservations about them.

Some Student Services staff request students to sign a Release of Information (ROI) form so they can obtain treatment records. In most cases, this information is unnecessary. Advise clients to use discretion and care in signing papers to release information. If needed, advocate on students' behalf. Students who have had a brain injury or who are visually impaired are not required to disclose their treatment. Neither are students with psychiatric disabilities.

In addition to disclosing to Student Services staff, Education Specialists and consumers should discuss and weigh the advantages and disadvantages of disclosing to individual instructors or classmates, as needed. While decisions about disclosure are a personal choice, Education Specialists should provide consumers with a safe environment to explore their options and make their own decisions.

The Family Educational Rights and Privacy Act of 1974 (Buckley Amendment) provides faculty members with the right to see educational information in institutional files for students with whom they work, but exempts disability records.

The ADA states that documentation required for receiving accommodations "must be reasonable and must be limited to the need for the modification or aid requested." It should not go beyond what is needed to establish the existence of a disability. The request for extensive case files is a violation of confidentiality.

The Family Educational Rights and Privacy Act of 1974 (Buckley Amendment) provides faculty members with the right to see educational information in institutional files for students with whom they work, but exempts disability records.

When weighing the options, inform consumers that if they choose to disclose a disability to student services, the law guarantees that the information will be kept confidential. All information related to disabilities must be kept in a locked file and only be accessible to Student Services staff. Although some instructors may request information about a particular student in their class, they do not have a right to the information. The only information that can be disclosed is that a student has a verifiable disability and is entitled to the specified accommodation. There are federal laws that protect privacy:

The Family Educational Rights and Privacy Act of 1974 (Buckley Amendment) provides faculty members with the right to see educational information in institutional files for students with whom they work, but exempts disability records.

The ADA states that documentation required for receiving accommodations “must be reasonable and must be limited to the need for the modification or aid requested.” It should not go beyond what is needed to establish the existence of a disability. The request for extensive case files is a violation of confidentiality.

Students who choose to disclose report that the accommodations and services that become available make a big difference in their comfort and success on campus. Many campuses, particularly community colleges, see their mission as providing educational opportunities to the whole community. They welcome diversity.

Students are not required to disclose to receive Supported Education services.

(Note: See Attachment C for additional resources on accommodations and disclosures.)

Accommodations for General Educational Development (GED) Testing

The process for receiving accommodations for the GED is similar to those for receiving accommodations at the postsecondary level. An application “Request for Testing Accommodations (Emotional/Mental Health)” must be completed and approved before accommodations will be granted. The application has three parts: Section 1: to be completed by GED candidate; Section 2: to be completed by the GED Chief Examiner; and Section 3: to be completed by Professional Diagnostician or Advocate.

Section 3 contains three subsections that include a verification of the emotional/mental health impairment, the requested accommodations and other information and supporting documents. This section requires the professional diagnostician to provide a clear diagnosis and information on current functional limitations that might affect the student’s ability to take the tests under standard conditions, so that the rationale for the requested accommodations might be properly evaluated. The documentation is considered current if it has been completed in the last 6 months.

The Chief Examiner must sign off on the application and send it to the GED administrator before a request will be granted. Most frequent accommodations received are:

- extended time
- use of a calculator
- use of a scribe
- large print edition
- supervised frequent breaks
- use of a private room for testing

If other accommodations are required, the GED administrator must be contacted.

The information provided to the GED testing service will be treated as confidential and will be used solely to determine eligibility for accommodations. Details about testing accommodations will be shared only with the testing staff and will not be released to anyone else. For further information, contact the American Counsel on Education, National GED Testing Services at <http://www.gedtestingservice.com>

Disclosure Summary

The Supported Education Specialists' tasks are to provide clients with accurate information and assist with evaluating their choices to make a decision about disclosing to Student Services, educational staff and peers. The pros and cons, or the cost and benefits, should be discussed prior to enrollment in the education environment and each semester thereafter. It should be emphasized that disclosure is a prerequisite to receiving accommodations but not for receiving Supported Education services from the Supported Educations Specialists. Education Specialists and students in the program should also discuss specific information that they wish to disclose, and what they do not want to disclose. The topic of disclosure should be discussed on multiple occasions.

Although accommodations can be granted if disclosure occurs mid-semester when the student may desire or require assistance, it is recommended students contact the Student Services before problems emerge. Discussions regarding accommodations should be ongoing, particularly if the client is experiencing difficulty with their student role. The Supported Education Specialist can be a spokesperson and an advocate for the client throughout the semester. It is important for the Supported Education Specialist to build a relationship with the Student Services staff, describe their collaborative role and explain how they can assist the student to be successful.

Students are not expected to contact their instructors to receive accommodations. To respect confidentiality, all accommodations should go through the Student Services Office. The instructor does not have access to information about a student's particular disability nor the functional limitation that requires the accommodation. They are required to provide the accommodation based on the information provided by Student Services. This process is designed to eliminate any stigma or discrimination that might occur and to provide accountability.

Supported Education Specialists should also discuss the pro and cons of disclosure by the client to other students or staff. If a client does choose to disclose, the specific information to be disclosed should be considered, including receiving mental health treatment, the presence of a psychiatric disability, or difficulty with anxiety. A brief checklist to use for disclosure to others on campus includes the following questions:

- Whether to tell?
- What to tell?
- Who to tell?
- When to tell?
- How to tell?
- How will I benefit?
- Identify potential problems.

(Note: The Career Profile in Supplemental Tools Section A includes a work disclosure section and a corresponding educational disclosure section. The educational disclosure section can be used to initiate conversation about the pros and cons of disclosing to Student Services and others. An additional disclosure form has been added in Supplemental Tools Section B.)

Taking Placement Tests

Students attending community colleges for the first time are required to take placement tests to determine the level of math and English courses for which they are qualified. If they need remediation in either of these subjects they may be required to take not-for-credit courses.

Enrolling in Classes

Students may enroll in classes either in person or online. Academic requirements for required classes are found in the student handbook. The role of an academic advisor is to help the student select the appropriate required classes and in the necessary sequence. Academic advisory may also be helpful selecting instructors who are flexible and supportive.

Purchasing Books and Supplies

One of the functions of financial aid is to provide money to purchase books and supplies. Textbooks can be a major expense at the college bookstore. Used books are often an option as are online textbook bookstores such as <http://www.booksprice.com> and others. Education Specialists should plan to assist students in obtaining the books and materials needed each term.

Finding Classrooms and Campus Resources

Many students may benefit from a tour of the campus before enrolling in classes, identifying the Admissions/Registration Office, Financial Aid Office, and the Student Services Office. After enrollment the Education Specialist may help the student locate their classrooms, restrooms, instructor offices, student union/cafeteria, library, computer center, learning or career center, and student health center. It may also be helpful to identify a quiet place on campus where the student can withdraw to rest.

Academic Assistance

A student's academic advisory will assist with class selection and some schools may provide tutoring. Some education programs provide "introduction to college" or similar classes that would address study skill, time management, how to use the library and other information necessary for student success. The Education Specialist should be aware of and refer students to these resources as appropriate.

Personal Resource Needs

Students may need assistance with transportation, childcare, and a place to study, managing their symptoms, and managing their financial aid. The initial education assessment will identify these needs and will be reexamined and updated each semester.

Individualized, Unlimited Follow-along Supports**Follow-along Supports**

Clients will receive individualized, unlimited follow-along supports for as long as they are needed based on client choice. Each client will help to plan for and receive individual and different supports for engaging in educational experiences that are based on the educational goal, client preferences, educational history, needs, etc. The Education Specialist provides most services but supports may also come from a variety of people, including treatment team members, family, friends and peers. Education Specialists also provide support to those working in educational settings, such as the Student Services staff, at the client's request.

The Education Specialists and the student have face-to-face contact within 1 week before starting an educational experience, within 3 days after starting an educational experience, weekly for the first month, and contact will continue to occur at least monthly for a year or more, on average, after continuous involvement in educational experiences, as desired by clients. The Education Specialist also offers to help with career development by continued career exploration, review of education goal and referral to Supported Employment services. If the current education program is inappropriate or the client is dissatisfied, the Supported Education Specialist offers to help the client find a more desirable educational experience or program. If an education goal is disrupted or not completed, regardless of the ending, the Education Specialist will offer to help with another education goal.

Personal Support and Coaching

Students report a significant factor in their success is their relationship with the Education Specialist. The Education Specialist provides personal support and functions as a coach and cheerleader. They are available when and where the student needs them. They do not function as a therapist, but rather as a facilitator. Three basic questions identify a student issue and what might be done:

1. What is going on? Helping students/clients to clarify and identify key issues calling for change.
2. Which solutions make sense for me? Helping students/clients see various possible outcomes from which to choose.
3. What do I have to do to get what I want? Helping students/clients develop strategies for accomplishing goals.

Follow- Along Support Plans: Revisions and Updates

Each semester or term the Follow-Along Support Plan will be revised and updated as needed. Based on the student's progress and academic achievement the grades and course completion will be discussed and plans made for the next terms classes. Skill and resource needs will be revisited as well as the level of support needed. Accommodations and disclosure requirements will be reviewed. Achievements and completions will be acknowledged and celebrated.

(Note: The Individualized Follow-Along Support Plan is included in the Supplemental Tools Section E.)

Standards for Student Academic Achievement

Most education programs have standards for student academic progress, particularly for degree, certificate or diploma programs. This information is often found in a student handbook or available online. The standards include minimum grade point average (GPA) and minimum credits completed. The programs may also notify the students through an academic alert if they have not achieved satisfactory progress. This may be followed by academic probation or academic suspension. Standards vary across programs.

Withdrawal

In the course of their postsecondary education experience, students may experience a reoccurrence or worsening of their psychiatric symptoms. They may need to lighten their academic load or withdraw from school altogether for a period of time. Research has shown that the withdrawal policies of the education institution are a key factor in the success rate for a significant number of students.

Inappropriate withdrawals, particularly when the student simply stops going to class, can result in failing grades and/or grants or loans coming due. When a student is ready to reenroll, the failing grades will affect their academic standing and they may be ineligible for financial aid.

It is very important to understand the appropriate process for withdrawal from a course, or for a withdrawal or request for a leave of absence from an academic program or institution. Most colleges and universities have a medical leave policy that will minimize the impact on the student's academic progress. It is also critically important that the Financial Aid Office be contacted to determine the impact on grants or loans when reducing academic credits or withdrawing on grants or loans.

Policies may vary greatly across institutions. Information about withdrawal policy is generally found in the college handbook or college website. Information about grants and loans may be stated in the award documents. If there is any doubt about the implications of the policy, it is critical that the student and/or the Education Specialist consult with the responsible administrators. Having the knowledge prior to the need will smooth out the process should it need to occur.

(Note: Supported Employment Specialists often track new job attainment and job terminations through use of the Job Start and Job End forms. For Supported Education clients, an alternative to these forms is included in Supplemental Tools Section D labeled the 'Educational Experience report' form. The Educational Experience Report form tracks enrollment, dropout, withdrawal, and graduation status as well as lessons learned.)

Assertive Engagement and Outreach

Service termination is not based on missed appointments or fixed time limits. Engagement and outreach attempts are made by integrated team members and are systematically documented. Coordinated visits by Education Specialist with integrated team members include multiple home/community visits. Staff connects with family, when applicable.

Once it is clear that the client no longer wants to pursue educational goals or continue Supported Education services, the Supported Education Specialist and/or the treatment team stops outreach efforts.

(Note: Supported Employment Specialists often use a transition plan when clients decide to discontinue Supported Employment Services. For Supported Education clients an alternative form is included in Supplemental Tools Section F labeled the 'Supported Education Services Transition Plan' form. This form leads a discussion with the client regarding transitioning to natural supports and how to decide to return to the SEd program.)

Attachment A: Supported Education Specialist Job Description

Qualifications

The full-time position of Supported Education Specialist requires a person with a Bachelor's Degree or equivalent, with a minimum of 3 years experience working with people with mental illness, and a thorough knowledge of the mental health system. Knowledge of, and the ability to work collaboratively and as an advocate within the postsecondary education and other education systems is necessary.

Excellent motivational interviewing and interpersonal skills are needed to work with consumers, mental health treatment team members, staff of education institutions and members of the Advisory Committee. Willingness to learn and utilize the skills necessary to meet Supported Education fidelity measures is required. The position requires time working outside of the office and some evening hours. The ideal candidate would provide hope and inspiration to consumers and be committed to education as a road to recovery for them.

Job Duties

- Develop marketing, recruitment and referral strategies.
- Assist clients with registration, financial aid and other education institution requirements as needed.
- Establish education goals with clients.
- Assess clients strengths, and learning and resource needs, to meet education goals.
- Develop implementation plans for clients including support and accommodation requirements.
- Monitor progress of clients and modify plans as needed.
- Provide support and assistance to clients.
- Advocate and negotiate for clients in both education and mental health settings.
- Develop peer support services.
- Participate in weekly treatment team meetings.
- Participate in evaluation and fidelity procedures.
- Participate in education and training seminars and conferences for disseminating Supported Education practices.

Supervision

The Supported Education Specialist reports to the Director of Community Support Services or their equivalent.

Salary and Benefits

Comparable to other staff positions requiring similar qualifications and job duties.

Attachment B: Loans and Loan Defaults and Deferments

A Federal Perkins Loan

A Perkins Loans is a low-interest loan for both undergraduates and graduate students with exceptional financial need. Federal Perkins Loans are made through schools' financial aid offices and must be repaid.

Students can borrow up to \$3,000 for each year of undergraduate study. Amounts vary by year. The total amount they can borrow as an undergraduate is \$15,000.

If they miss a payment or make less than a full payment, a late fee and collection costs may be charged. Repayment must begin 9 months after the student graduates, or after they leave school, or drop below half-time status. Students have up to 10 years to repay the loans in full.

Direct and Federal Family Education Stafford Loans (FFESL)

These loans are the U.S. Department of Education's major form of self-help aid. They may be subsidized or unsubsidized. These loans provide substantial amounts of money for students who are fully matriculated in a program of study that is at least 1 full academic year. The Financial Aid Administrator of the educational institution will have details for application, disbursement, and repayment.

Unless students have been successful in college and maintained a good grade-point average and strong full-time or part-time status, loans are not recommended. It takes some students several semesters to develop the endurance and work habits necessary to complete a degree program. Consider this developmental process when applying for a financial aid package.

Resources for Graduate School

After students complete an undergraduate degree they are no longer eligible for certain sources of federal and state funds. For example, Divisions of Vocational Rehabilitation are particularly reluctant to provide funds because employment is expected after undergraduate graduation. However, students who wish to attend graduate school can use the traditional routes of institutional scholarships in their field of study: loans, part-time or alternate semester employment, and family contributions as financial support. The graduate school or academic department can provide information about funding.

Defaulted Student Loan

If a student has defaulted on a loan it often means that they are unable to receive additional aid. However, options exist to enable students to continue to be eligible for some financial aid.

Each lender is required to have a repayment procedure to allow borrowers to bring a loan out of default by establishing a process to repay it. By doing so, borrowers renew their eligibility for federal financial assistance. The lender is also required to set a "reasonable and affordable" monthly payment amount. Contact the individual lender to pursue this option or search <http://www.studentaid.ed.gov>

Deferment and Forbearance

When students choose to secure a loan and find they are temporarily unable to repay the loan, they may request a *deferment* or *forbearance*. A deferment allows students to temporarily postpone payments on a loan.

Depending on the type of loan, students may have to continue paying interest on the loan while it is deferred. Students who are ineligible for a deferment, but who are temporarily unable to continue paying on the loan, may qualify for forbearance. With this option, payments may be postponed, reduced, or the time to repay may be extended. For additional information, go to <http://www.studentaid.gov> Search for *deferment* or *forbearance*.

Loan Consolidation Plan

Students with multiple loans can apply to consolidate the loans to group them together into a single payment. This may be a good option for students with older loans or loans that have been in default. Setting up a loan consolidation plan will remove any outstanding default. The repayment amount in this option can be advantageous for low-income borrowers. If the person falls at or below the poverty level, the monthly payment will be very low or \$0. For detailed information about the process, go to <http://www.studentaid.ed.gov> Search for *loan consolidation plan*.

Loan Discharge

Students can apply to have their loan discharged or cancelled based on a physician's certification that they are totally and permanently disabled. For more information about qualifying for this loan discharge, review the loan promissory note and Borrower's Rights and Responsibilities Statement or contact the loan holder. Information is also available at <http://www.studentaid.ed.gov> and at other Internet sources. Search for *student loan cancellation*.

Temporary Loans

Some education institutions give students short-term loans in case of financial emergencies. Consult with the Financial Aid Office to determine if loans are available and under what circumstances students may apply for them.

Attachment C: Resources for Providing Supported Education Services

Toolkits

“Training Frontline Staff,” Supported Education Evidence-Based Practice Kit. Substance Abuse and Mental Health Services Administration.

<http://store.samhsa.gov/product/Supported-Education-Evidence-Based-Practices-EBP-Kit/SMA11-4654CD-ROM>

“Tools for Implementation Sites.” University of Kansas Supported Education Toolkit. (2012)

<http://mentalhealth.socwel.ku.edu/full-curriculum>

Higher Education Support Toolkit: Assisting Students with Psychiatric Disabilities. Boston University (2009). **<http://cpr.bu.edu/resources/curricula/higher-education-toolkit>**

Handbook on Supported Education: Providing Services to Student with Psychiatric Disabilities. Karen Unger.

<http://www.amazon.com/Handbook-Supported-Education-Psychiatric-Disabilities/dp/1557663521>

Disability Services

Best Practice Resources on Disability Documentation. Association on Higher Education and Disability (AHEAD) at **<http://www.ahead.org>**

Job Accommodation Network’s Searchable Online Accommodations Resource (SOAR) Office of Disability Employment Policy **<http://www.jan.wvu.edu>**

Hyman, I. *Self-Disclosure and Its Impact on Individuals Who Receive Mental Health Services.* HHS Pub. No. SMA-08-4337 Rockville MD. Center for Mental Health Services, Substance Abuse and Mental Health Services Administration (2008).

http://download.ncadi.samhsa.gov/ken/pdf/SMA08-4337/SelfDisclosure_50p.pdf

Career Inventories

The Career Clusters Interest Survey

http://breitlinks.com/careers/career_pdfs/InterestSurvey.pdf

The MAPP Career Assessment

<http://www.assessment.com/MemberCenter/login.asp>

The Live Career, Career Test

<http://www.livecareer.com/career-test>

Supported Education Training Manual Draft: Supplemental Tools

April 2016

The tools included in this supplement have been adapted from the following sources:

IPS Supported Employment: A Practical Guide. (Swanson, S.J., Becker, D.R., 2013). Dartmouth Psychiatric Research Center. <http://www.dartmouthips.org/order/books>

“Training Frontline Staff,” *Supported Education Evidence-Based Practice Kit*. Substance Abuse and Mental Health Services Administration.

<http://store.samhsa.gov/product/Supported-Education-Evidence-Based-Practices-EBP-Kit/SMA11-4654CD-ROM>

“Tools for Implementation Sites.” *University of Kansas Supported Education Toolkit*. (2012)

<http://mentalhealth.socwel.ku.edu/full-curriculum>

Higher Education Support Toolkit: Assisting Students with Psychiatric Disabilities. Boston University (2009). <http://cpr.bu.edu/resources/curricula/higher-education-toolkit>

Handbook on Supported Education: Providing Services to Student with Psychiatric Disabilities.

Karen Unger.

<http://www.amazon.com/Handbook-Supported-Education-Psychiatric-Disabilities/dp/1557663521>

(Note: Preference was given to integrating Supported Education tools with previously developed IPS Supported Employment tools in order to more fully integrate services and to avoid repetitive services and forms.)

SUPPLEMENTAL TOOLS SECTION A:
Career/Education Profile

(Vocational Profile Adapted to Include Both Employment and Education Goals)

Career Profile IPS Supported Employment Referral

Face Sheet

Date of referral: [Click here to enter text.](#)

Name: [Click here to enter text.](#)
Address: [Click here to enter text.](#)
Email: [Click here to enter text.](#)
Phone number/s: [Click here to enter text.](#)
Best way to reach: [Click here to enter text.](#)

Case Manager/therapist: [Click here to enter text.](#)
State Vocational Rehabilitation Counselor: [Click here to enter text.](#)

Referral sent to State Vocational Rehabilitation

Other healthcare/social service providers: [Click here to enter text.](#)

What is the person saying about work? Why does s/he want to work now? What type of job?
[Click here to enter text.](#)

Is this person interested in gaining more education now to advance his/her career goals?
[Click here to enter text.](#)

Please include some information about the person's illness (diagnosis, symptoms, etc.). How might the person's illness (and/or substance use) affect a job or return to school?
[Click here to enter text.](#)

What are some of the person's strengths? (Experience, training, personality, supports, etc.)
[Click here to enter text.](#)

What job (type of job, hours, etc.) do you think would be a good match?
[Click here to enter text.](#)

Person making referral

Title

Education Profile Supported Education Referral

Face Sheet

Date of referral: [Click here to enter text.](#)

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

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

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

Phone number/s: [Click here to enter text.](#)

Best way to reach: [Click here to enter text.](#)

Case Manager/therapist: [Click here to enter text.](#)

State Vocational Rehabilitation counselor: [Click here to enter text.](#)

Referral sent to State Vocational Rehabilitation

Other healthcare/social service providers: [Click here to enter text.](#)

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?

[Click here to enter text.](#)

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

[Click here to enter text.](#)

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?

[Click here to enter text.](#)

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

[Click here to enter text.](#)

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?

[Click here to enter text.](#)

Person making referral

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?

[Click here to enter text.](#)

What are your long-term career goals?

[Click here to enter text.](#)

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

[Click here to enter text.](#)

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

[Click here to enter text.](#)

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

[Click here to enter text.](#)

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

[Click here to enter text.](#)

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

[Click here to enter text.](#)

Education

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

[Click here to enter text.](#)

What are your top three educational areas of interest?

[Click here to enter text.](#)

What is your long term educational goal?

[Click here to enter text.](#)

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

[Click here to enter text.](#)

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

Did you participate in vocational training classes in high school?

No

Yes

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

No

Yes

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

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

Other education or training programs

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.](#)

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.](#)

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

No

Yes

[Click here to enter text.](#)

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

No

Yes

[Click here to enter text.](#)

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.

What types of jobs are you interested in obtaining?

[Click here to enter text.](#)

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

[Click here to enter text.](#)

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?

[Click here to enter text.](#)

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

[Click here to enter text.](#)

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

[Click here to enter text.](#)

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

[Click here to enter text.](#)

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?

[Click here to enter text.](#)

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?

[Click here to enter text.](#)

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

[Click here to enter text.](#)

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 type="checkbox"/> Problem	Click here to enter text.
Social situations	<input type="checkbox"/> Okay	<input type="checkbox"/> Problem	Click here to enter text.
Taking tests	<input type="checkbox"/> Okay	<input type="checkbox"/> Problem	Click here to enter text.
Learning from lecture	<input type="checkbox"/> Okay	<input type="checkbox"/> Problem	Click here to enter text.
Learning by reading	<input type="checkbox"/> Okay	<input type="checkbox"/> Problem	Click here to enter text.
Learning hands on	<input type="checkbox"/> Okay	<input type="checkbox"/> Problem	Click here to enter text.
Concentration	<input type="checkbox"/> Okay	<input type="checkbox"/> Problem	Click here to enter text.
Memory	<input type="checkbox"/> Okay	<input type="checkbox"/> Problem	Click here to enter text.
Using computers	<input type="checkbox"/> Okay	<input type="checkbox"/> Problem	Click here to enter text.

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?

[Click here to enter text.](#)

Were you in any advanced classes? Which ones?

[Click here to enter text.](#)

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?

[Click here to enter text.](#)

What are your strengths related to being a student?

[Click here to enter text.](#)

What languages do you know?

[Click here to enter text.](#)

Plans for School and Training

What do you need in order to start school?

- | | | | |
|---|---|---|---------------------------------------|
| <input type="checkbox"/> Access to a computer | <input type="checkbox"/> Computer literacy | <input type="checkbox"/> Quiet place to study | <input type="checkbox"/> Transit card |
| <input type="checkbox"/> Financial aid | <input type="checkbox"/> Books/ supplies | <input type="checkbox"/> Mental health support | <input type="checkbox"/> Eldercare |
| <input type="checkbox"/> Help with transit route | <input type="checkbox"/> Help studying | <input type="checkbox"/> Help with a study calendar | <input type="checkbox"/> Childcare |
| <input type="checkbox"/> Help navigating campus | <input type="checkbox"/> More support from family/friends | | |
| <input type="checkbox"/> Help talking to teachers/instructors | <input type="checkbox"/> Other: Click here to enter text. | | |

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

What are your resources for paying for school tuition? For books? For other school costs?

[Click here to enter text.](#)

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?

[Click here to enter text.](#)

Do you need any type of classroom accommodations?

[Click here to enter text.](#)

What other types of supports may help you succeed in school or training?

[Click here to enter text.](#)

How do you plan on getting to the school?

[Click here to enter text.](#)

Education Supporters

Who do you rely on for support?

Have they encouraged you to go to school?

- | | | |
|---|--|--|
| <input type="checkbox"/> Mother/Guardian Click here to enter text. | Contact: Click here to enter text. | <input type="checkbox"/> Yes <input type="checkbox"/> No |
| <input type="checkbox"/> Father/Guardian Click here to enter text. | Contact: Click here to enter text. | <input type="checkbox"/> Yes <input type="checkbox"/> No |
| <input type="checkbox"/> Spouse/Sig other Click here to enter text. | Contact: Click here to enter text. | <input type="checkbox"/> Yes <input type="checkbox"/> No |
| <input type="checkbox"/> Brothers/Sisters Click here to enter text. | Contact: Click here to enter text. | <input type="checkbox"/> Yes <input type="checkbox"/> No |
| <input type="checkbox"/> Relatives Click here to enter text. | Contact: Click here to enter text. | <input type="checkbox"/> Yes <input type="checkbox"/> No |
| <input type="checkbox"/> Friends Click here to enter text. | Contact: Click here to enter text. | <input type="checkbox"/> Yes <input type="checkbox"/> No |
| <input type="checkbox"/> Spiritual leader Click here to enter text. | Contact: Click here to enter text. | <input type="checkbox"/> Yes <input type="checkbox"/> No |
| <input type="checkbox"/> Other Click here to enter text. | Contact: Click here to enter text. | <input 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.](#)

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.](#)

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.

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.](#)

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

Which different languages do you speak? Which language do you prefer?
[Click here to enter text.](#)

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?

[Click here to enter text.](#)

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

[Click here to enter text.](#)

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?

[Click here to enter text.](#)

Mental Health

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

[Click here to enter text.](#)

How does your mental illness affect you?

[Click here to enter text.](#)

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

[Click here to enter text.](#)

How do you cope with your symptoms?

[Click here to enter text.](#)

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

[Click here to enter text.](#)

How do the medicines work for you?

[Click here to enter text.](#)

Physical Health

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

[Click here to enter text.](#)

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?

[Click here to enter text.](#)

Climbing stairs?

No

Yes

How many flights? How often?

[Click here to enter text.](#)

Lifting

No

Yes

How much can you lift?

[Click here to enter text.](#)

Endurance

No

Yes

How many hours could you work each day?

[Click here to enter text.](#)

Each week?

[Click here to enter text.](#)

What is the best time of day for you?

[Click here to enter text.](#)

Cognitive Health

Do you have problems with memory?

[Click here to enter text.](#)

Concentrating?

[Click here to enter text.](#)

Doing things fast (psychomotor speed)?

[Click here to enter text.](#)

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

[Click here to enter text.](#)

Getting Ready for a Job

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

[Click here to enter text.](#)

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

[Click here to enter text.](#)

Do you have two forms of identification? Picture ID, social security card...?
Click here to enter text.

How will you get to work?
Click here to enter text.

Interpersonal Skills

Would you like a job that involved working with the public?
Click here to enter text.

Where do you live and with whom do you live?
Click here to enter text.

Who do you spend time with? How often do you see or talk to them?
Click here to enter text.

Who can help us think about jobs you would enjoy?
Click here to enter text.

- Appointment made with this person to discuss jobs.
If not, why? Click here to enter text.
-

Once you are employed, who would be a good person to support you?
Click here to enter text.

Anyone else?
Click here to enter text.

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: Click here to enter text.
 - Unsure which benefits s/he receives
 - No benefits
-

Do you manage your own money?
Click here to enter text.

- Referral made to benefits planner.
If no referral, why not: [Click here to enter text.](#)
-

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.](#)

What could be some of the disadvantages?
[Click here to enter text.](#)

Are there any things that you would **not** want your employment specialist to share with an employer?
[Click here to enter text.](#)

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.](#)

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?

[Click here to enter text.](#)

What could be some of the disadvantages?

[Click here to enter text.](#)

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?

[Click here to enter text.](#)

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?

[Click here to enter text.](#)

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?

[Click here to enter text.](#)

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?

[Click here to enter text.](#)

How often?

[Click here to enter text.](#)

Legal History

Have you ever been arrested?

[Click here to enter text.](#)

Have you ever been convicted of a crime?

[Click here to enter text.](#)

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?

[Click here to enter text.](#)

Are there places in your neighborhood that you like to go to?

[Click here to enter text.](#)

Do you belong to clubs, groups, a church, etc.?

[Click here to enter text.](#)

What hobbies or interests do you have?

[Click here to enter text.](#)

What are your typical sleep hours?

[Click here to enter text.](#)

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

[Click here to enter text.](#)

Information from Family, Previous Employers or Others

[Click here to enter text.](#)

Staff signature

Date: _____

Client signature

Date: _____

**SUPPLEMENTAL FORMS SECTION B:
Supported Education Disclosure Form**

Supported Education Disclosure Form



Client Name: [Click here to enter text.](#) **Education Specialist:** [Click here to enter text.](#)

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...

[Click here to enter text.](#)

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...

[Click here to enter text.](#)

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.
- Other or explanation of above choices.
[Click here to enter text.](#)

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: [Click here to enter text.](#)
Information to be shared: [Click here to enter text.](#)

Department or individual: [Click here to enter text.](#)
Information to be shared: [Click here to enter text.](#)

Department or individual: [Click here to enter text.](#)
Information to be shared: [Click here to enter text.](#)

Department or individual: [Click here to enter text.](#)
Information to be shared: [Click here to enter text.](#)

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: [Click here to enter text.](#)
Information to be shared: [Click here to enter text.](#)

Department or individual: [Click here to enter text.](#)
Information to be shared: [Click here to enter text.](#)

Department or individual: [Click here to enter text.](#)
Information to be shared: [Click here to enter text.](#)

Department or individual: [Click here to enter text.](#)
Information to be shared: [Click here to enter text.](#)

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

SEd Participant Signature: _____ **Date:** _____

EdS Signature: _____ **Date:** _____

**SUPPLEMENTAL TOOLS SECTION C:
Individualized Pre-Enrollment Plan**

Individualized Pre-Enrollment Plan

Name: Click here to enter text.

Date: Click here to enter text.

Long Term Goal: Click here to enter text.

Education Goal (in person's own words): Click here to enter text.

Level of Disclosure: Click here to enter text.

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>

**SUPPLEMENTAL FORMS SECTION D:
Education Experience Report**

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.](#)

Employment/Educational Specialist: [Click here to enter text.](#)

School or training program: [Click here to enter text.](#)

Degree or certificate sought: [Click here to enter text.](#)

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

Full time or part time: [Click here to enter text.](#)

Date person exited the school/training program: [Click here to enter text.](#)

Degree/certificate obtained: [Click here to enter text.](#)

Reason that person left the school/training program: Graduation; Other:
[Click here to enter text.](#)

Level of disclosure: [Click here to enter text.](#)

Supports provided by education specialist: [Click here to enter text.](#)

Supports provided by office for students with disabilities: [Click here to enter text.](#)

Obstacles encountered/how did person overcome obstacles? [Click here to enter text.](#)

Future education goals: [Click here to enter text.](#)

Lessons learned for future education or job experiences: [Click here to enter text.](#)

Signature

Date

**SUPPLEMENTAL TOOLS SECTION E:
Individualized Educational Follow-Along Support Plan**

Individualized Educational Follow-Along Support Plan

Name: Click here to enter text.

Date: Click here to enter text.

Long Term Goal: Click here to enter text.

Education Goal (in person's own words): Click here to enter text.

Level of Disclosure: Click here to enter text.

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

**SUPPLEMENTAL TOOLS SECTION F:
Supported Education Services Transition Plan**

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?

[Click here to enter text.](#)

If you had to make a big decision today, who would you call? Who have you called in the past? [Click here to enter text.](#)

Who can help with your educational goals?

	Y or N	Name of Support(s) Preferred	Contact Information
My case manager	Choose an item.	Click here to enter text.	Click here to enter text.
My therapist	Choose an item.	Click here to enter text.	Click here to enter text.
My family	Choose an item.	Click here to enter text.	Click here to enter text.
My friend	Choose an item.	Click here to enter text.	Click here to enter text.
My significant other	Choose an item.	Click here to enter text.	Click here to enter text.
Clergy	Choose an item.	Click here to enter text.	Click here to enter text.
School Support Staff	Choose an item.	Click here to enter text.	Click here to enter text.
Financial aid advisor	Choose an item.	Click here to enter text.	Click here to enter text.
Teacher	Choose an item.	Click here to enter text.	Click here to enter text.
Other	Choose an item.	Click here to enter text.	Click here to enter text.

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

[Click here to enter text.](#)

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?

[Click here to enter text.](#)

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?

[Click here to enter text.](#)

How would you like to be contacted?

- | | | |
|--|---|---|
| <input type="checkbox"/> In-person (community) | <input type="checkbox"/> In-person (job site) | <input type="checkbox"/> In-person (agency) |
| <input type="checkbox"/> Phone call | <input type="checkbox"/> Text | <input type="checkbox"/> Email |

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

[Click here to enter text.](#)

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

[Click here to enter text.](#)

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.)

[Click here to enter text.](#)

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

Your signature/date: _____

SEd specialist signature/date: _____

Other signature/date: _____

**SUPPLEMENTAL TOOLS SECTION G:
Educational Resource Development
Preparation Example Forms**

Education Resource Development

Introduction



- ◆ **Your Name**
- ◆ **Your Employer**
- ◆ **What you do**
- ◆ **The purpose of the visit**

Examples

“Hello, my name is Crystal. I am an education specialist at the Southern Oregon VA. Part of my job is to find out about scholarship and education programs. I’m hoping to set a brief appointment with you to find out more about your program.”

“Hello. My name is Dorothy Parker and I work for School Opportunities here in town. I am an education specialist and my job is to introduce students to programs. Would it be possible to schedule a 15-minute appointment with you to learn more about what you do here and the type of person who succeeds in your program?”

“Hi. My name is John Keats and I work for Montgomery County. I am an education specialist and I help people who have been out of school for a while to re-engage. Part of my job is to learn from departments (or scholarship programs) about what they do. Would it be possible to schedule a 20-minute appointment to come back and learn more about _____ (name of program)?”

Your introductory statement:



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.

Education Resource Development

Explain the SEd Program



Example explanation of supported education:

Supported education helps people engage and remain in school. We find out about the person's strengths and interests and what type of job they want, and what type of education they want. We also learn about what schools, departments and scholarship programs are looking for. We stay in touch with programs as much as they want and we provide a lot of support to students behind the scenes. For example, we might help a student apply to financial aid, help with purchasing books and getting to know campus, and make sure transportation to school is set up. We also may make a connection with employers. If we have a student who we think is a good match for your department could we contact you?

Your explanation of SE program statement:

Information to be highlighted about SE program:

<i>Example</i>		
Local agency		
Help people		
Provide support		

Closing: "Thank you for your time and information today. If I have an individual who I think could be a good match for your department would I contact you?"

Education Resource Development

Introducing the Student



Have information /client strengths prepared.

Hello, this is _____ from _____ following up on our recent meeting. We wanted to introduce a student that might be interested in the program here. Could we set a time for you to meet Joe?

Example

Client: Joe Smith
Strength 1: Very interested in mechanical work- has some tools
Strength 2: Has drivers license
Strength 3: Wants to become ASE certified

Client: Ana
Strength 1: Interested in becoming a nurse
Strength 2: Caring, empathetic, friendly
Strength 3: Timely and meticulous

Client: Zeke
Strength 1: Dedicated birdwatcher
Strength 2: Interested in biology and restoration
Strength 3: Believes in scientific protocols

Client:
Strength 1:
Strength 2:
Strength 3:

Client:
Strength 1:
Strength 2:
Strength 3:

Client:
Strength 1:
Strength 2:
Strength 3:

Client:
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Strength 1:
Strength 2:
Strength 3:

Client:
Strength 1:
Strength 2:
Strength 3:

Client:
Strength 1:
Strength 2:
Strength 3:

EDUCATIONAL RESOURCE CONTACT LOG

Educational Specialist:

Click here to enter text.

For Client:

Click here to enter text.

Educational Resource:

Click here to enter text.

Date of contact:

Click here to enter text.

Name of contact:

Click here to enter text.

Purpose of the contact:

Click here to enter text.

Information learned about educational resource or other notes:

Click here to enter text.

Outcome/plan to follow up:

Click here to enter text.

**SUPPLEMENTAL TOOLS SECTION H:
Memorandum of Understanding Development Guide**

Development Guide: Memorandum of Understanding between Agencies and Educational Institutions



A. Purpose of MOU:

The statement of purpose should include the agencies that are entering into the partnership, reason or purpose of the partnership and the effective date of the agreement. This document is often developed with the assistance of the Contracts Department, Human Resources Department and may include legal terminology to describe the partnership and terms of this agreement.

B. Description of Partner Roles and Responsibilities:

The description of roles should include the responsibilities and activities that each partner will be providing in this agreement. It should clearly state responsibilities and roles for all parties entering the agreement (agency and educational institution) as well as any work space, access to documents, email, program information, or attended meeting, etc. As needed, the MOU can define hours and duties performed for the agency and Education Specialist. This section may be used to detail what will not be permitted by the agency or educational institution and secure legal parameters of the agreement including liability concerns. The MOU can define or include examples of activities that the Education Specialist would engage in, such as:

- Assisting Supported Education Students in navigating educational system.
- Attending advisory meetings (could identify a specific department).
- Attending student events or informational sessions about programs.
- Serving as a member of the multidisciplinary educational team to introduce students to professional services within both the school system (school based counseling department, financial aid, academic advisors, TRIO, Disability services, etc.) and Mental Health services (agency that is represented).
- Serving as a liaison between Agency (Community Mental Health) and Educational institution when a release of information and FERPA has been signed.
- Access to advising staff email or provide school email address.
- Access to room scheduling privileges on campus.
- Access to advising software programs or materials.
- Access to an office space or building during specific hours.
- Computer access, phone access, coping, printing, etc.
- Login account for student services or access to specific student records.
- Parking accommodations for Supported Education Specialist including parking passes or access to staff parking lot, etc.

C. Information Sharing:

This section will address the type and extent that information will be shared between the agency and educational institution. This may be a limited section and refer back to HIPAA and FERPA guidelines. If an Education Specialist has been given permissions to use educational software or email, this may be a section to discuss in what way this information will be used and where it can be accessed, etc.

D. Supervision Responsibilities:

Clearly state the responsible party for the Education Specialist including those responsible for supervision. Almost exclusively this will be the agency. Including the agencies organizational chart or management structure may be beneficial or needed. If there will be a point of contact for the Supported Education specialist on campus, example: Director of Student Support Services, this should also be defined and include the educational institutions supervisory or leadership roles as well as the educational management structure.

E. Signatures:

The MOU should be signed and dated by both of the highest ranking agency and school officials who have the oversight or decision-making authority. The creation of the MOU can take a few revisions depending on legal needs. During the creation it is best to have those that will be impacted by the MOU present to help define roles, needs, and responsibilities.

References:

United States, U.S. Department Of Justice, Community Oriented Policing Services. (Sept., 2014). *Fact Sheet: Memorandum of Understanding for School-Based Partnerships* (pp. 1-3). Community Oriented Policing Services.

**SUPPLEMENTAL TOOLS SECTION I:
Supported Education Checklists**

Supported Education Checklists

Checklist for the Application Process

- Obtain application forms from the institution, on line, or use the universal form, if appropriate.
- Complete the application essay or personal statement.
- Check the application for accuracy and completeness.
- Contact other institutions for transcripts.
- Contact teachers or others for Letters of Recommendation.
- Mail recommendation forms to teachers or others with stamped self-addressed envelope.
- Mail completed application forms before deadline.
- Contact the people who are writing letters of recommendation to verify that they have completed and mailed the letters by the application deadline.
- Send thank you notes to recommendation letter writers.
- Contact the registration office to verify they have received all information including the application, transcripts and letters of recommendations.
- Make copies of all application materials and keep in a separate file in a safe place.

Checklist for Financial Aid Application

- Obtain application form from the financial aids office of the institution, or print out the FAFSA on line.
- Review income tax returns.
- Review earnings from SSI/SSDI.
- List other assets or income.
- Explain special financial considerations such as VR funding.
- Read repayment responsibilities.
- Check FAFSA application for accuracy and completeness.
- Mail or send by email completed application forms before the deadline. (Check with the institution).
- Keep track of the date on which each form was mailed. A Student Aid Report (SAR) should be mailed to you within 4 weeks.
- When the SAR arrives, contact the financial aid office of the college/s to which you have applied to see if they need a copy.
- Apply for Pin #.
- If you are a VR client, make sure your Counselor is in touch with the Financial Aid Office.
- Make copies of all financial aid application materials and keep in a separate file in a safe place.

Checklist for College Registration

- Admission
- Pay fees
- Placement testing
- Advisor identified
- Classes/program selected
- All forms completed
- Student ID received
- Parking permit/bus pass/shuttle service

Checklist for Disability Services

- Registered with Disability Services
- Documentation for disability
- Accommodations requested
- Accommodations received

Checklist for Orientation Materials

- College catalogue
- College map
- Student Handbook
- Class schedule
- Student newspaper

Checklist for Reviewing Policies and Procedures

- Grading system
- Academic standing
- Attendance
- Add/Drop procedures
- Computer lab/printing policies
- Tutoring center
- School e-mail account
- Student insurance
- Student health center
- Student counseling center
- Medical leave policy
- Parking
- Library policies/hours
- Contacting instructors/office hours
- Code of Conduct
- Inclement weather