

NEW COUNSELORS SKILLS & COMPETENCIES CHECKLIST

NEW COUNSELORS TRAINING AND ORIENTATION LEADING TO BASIC SKILLS AND COMPETENCIES

The New Counselors Skills & Competencies Checklist is designed to assist managers to ensure that Field Rehabilitation Services counselors possess a specific level of knowledge, skill, and ability as they begin their careers with the Virginia Department of Rehabilitative Services (DRS). Since formal classroom training is not the only method by which counselors become prepared to carry out their responsibilities, managers and/or unit supervisors are the first line of responsibility to insure that comprehensive training is coordinated and provided when the new counselor begins work.

This is a checklist of skills counselors should demonstrate as a result of training on the job with managers, unit supervisors, lead counselors, and others; through training in classroom and on-line formats, and/or through past work experiences.

Space has been left at the end of sections and at the end of the form for managers/supervisors to add any specific skills or competencies deemed necessary for the individual counselor. This should include orientation and training regarding specific referral sources, community partners/resources; or other points relevant to their assigned work area. Managers and Supervisors should use the checklist as well as prior approval of selected casework processes, during the first year of employment, to evaluate and guide the progress of new counselor training and development efforts.

When the manager determines that the counselor has acquired all the skills and competencies on the checklist, the manager completes the form, both the counselor and manager sign and date it, attach it to a Human Resources Action Worksheet (HRAW) and send it to the FRS Director for review, signature, and submission to Human Resources for an in-band pay increase to senior counselor, where appropriate.

To assist the manager/supervisor in this development process, several training modules are offered to staff on an ongoing basis. The New Counselor Skills Training (NCST) program, comprised of the series of training modules outlined below, is required training for all new FRS caseload carrying counselors. (Job placement counselors, disability program navigators, vocational evaluators, program support technician seniors, and WWRC counselors are encouraged to attend at the discretion of their managers and will be accommodated as space is available). The NCST training workshops are scheduled based on two factors: sufficient counselors to make a full class and training budget allocations. Since the programs are not offered right after a counselor's employment, managers are responsible to insure that comprehensive training is provided when the counselor starts work. Participation in NCST modules will reinforce and strengthen what counselors have learned locally as well as give them a statewide perspective.

As the NCST series is lengthy and may include some online learning components, managers/supervisors are encouraged to provide new staff with the support and guidance needed for full participation. This includes following up with counselors as they return from training to debrief and incorporate their learning's and to encourage their involvement and effective time management so that they may fully participate in the on-line modules.

Following is a list of the training modules which currently comprise New Counselor Skills Training. The training location for modules varies except for where the location is specified.

NEW COUNSELOR SKILLS TRAINING MODULES

New Counselor Skills Training – Part I – The Vocational Rehabilitation Process (4 days)

This training takes the counselor through the vocational rehabilitation process as carried out by the Dept. of Rehabilitative Services Field Rehabilitative Services Division. The counselor is taught policies and procedures, including documentation requirements and best practices for referral, application, eligibility, plan development/implementation, job readiness/job placement, and successful closure as well as other actions taken or required by counselors in the course of working with consumers. This training provides lecture as well as practical application through individual and group exercises.

New Counselor Skills Training – Part II – Orientation to DRS Central Office Programs and Resources (2 days in Richmond/Central Office)

This training provides participants with an orientation to the various special programs and resources housed within the DRS Central Office, including but not limited to, Community Based Services, Employment Services and Special Programs, Educational Services, and Human Resource Services. A tour of the Central Office is provided and staff has the opportunity to meet key Central Office staff with whom they may have regular contact. Participation in NCST I is not a pre-requisite for this training.

Woodrow Wilson Rehabilitation Center Tour/Orientation (1 ½ days at WWRC)

New counselors are provided a tour of Woodrow Wilson Rehabilitation Center (WWRC) and meet with key staff from WWRC Admissions, Counseling, Training, Medical Services, Vocational Evaluation, and other specialty programs offered at the Center. The schedule is such that participants are also able to observe and obtain information on residential and evening recreation programs. This provides the counselor with a realistic understanding of Center life that is vital to their ability to provide information and referral guidance to consumers considering participation in WWRC programs/services. Participants have the opportunity to individualize their WWRC tour to meet their specific needs, including meeting with consumers currently involved in WWRC programs, or meeting with other program staff to gain further information, as needed.

Job Development and Job Placement (2 days)

This training provides information which helps participants understand the dynamics of job development and job placement. It focuses on empowering counselors to develop business relationships and networks to assist consumers with disabilities with their job search. Participants will learn basic tools necessary to promote business relationships and job development. A series of activities including role-plays, directed job search activities, and meeting with employers to define best strategies for successful employment outcomes are included. The participants will hear directly from a business panel regarding ways to approach businesses and methods to determine the needs of business.

Employment-Driven Caseload Management (1 1/2 days)

This training teaches that effective caseload management is achieved through the successful application of case management, planning and scheduling, and time management. Counselors are provided with information to help them to better engage consumers as active partners in the

employment preparation and job placement process. Tools to support the counselor to carryout effective caseload management are shared. Techniques for planning, delegating, and prioritizing work activity are shared. Participants have an opportunity to evaluate their personal time management traps and learn tips to address the most common time management challenges.

OTHER DRS TRAINING FOR NEW EMPLOYEES

In addition to NCST, there are other trainings available which the manager/supervisor should insure each new employee receives.

New Employee Benefit Orientation

This orientation, provided by DRS Human Resource Services benefits specialists, assists the new employee to understand valuable benefit information. It is offered once a month statewide via video teleconference (VTC) and goes from 10:00 a.m. to noon. The employee has an opportunity to review and ask questions about health insurance, flexible reimbursement accounts, disability insurance, retirement, deferred compensation savings, life insurance, long-term care insurance, and leave benefits and associated forms they receive on the first day of employment. Attendance for new employees is required. This orientation is scheduled around the 25th of each month to give an opportunity to employees starting on both the 10th and the 25th to make a health insurance selection by the 1st of the following month. NOTE: It is necessary to reserve a space in order to insure a VTC site is reserved for each employee's participation. Contact Human Resources for more information.

Your DRS Family

This power point presentation provides new DRS employees information about the exciting programs that make up DRS and emphasizes the importance of each employee in supporting our endeavor to fulfill our agency vision and mission. A brief history of vocational rehabilitation and an overview of our organizational structure are included. A "Your DRS Family" training ambassador will be in contact with each manager and their new employee within 6 weeks of employment to schedule this orientation. Training ambassadors are DRS staff volunteers who will come on site to the office of the new employee to present the information on a one to one basis. Contact the FRS Training Unit for more information.

Computer Training Skills

AWARE (Accessible Web-based Activity and Reporting Environment)

Local Office AWARE Support (Level 1) staff in conjunction with lead counselors where available, provide basic AWARE training to new counselors. Regional AWARE Support (Level II) and Statewide AWARE Support staff are available to support the Level I trainers. Group training can be arranged if warranted for large groups of new hires.

Other Computer Skills Training

Managers and new counselors should assess the new counselor's level of competency on the agency's computer applications including but not limited to Microsoft Windows/File Management, Word, Excel, and Outlook. Support and training on these and other computer applications can be received at the local office level from persons designated to do such training. Regional training classes may be made available to staff as required. Contact the FRS Technology Liaison at Central office for more information.

NEW COUNSELORS SKILLS & COMPETENCIES CHECKLIST

INTRODUCTION TO EMPLOYMENT IN DRS

- () General information for all staff
- () Orientation to state employment
- () History and philosophy of Vocational Rehabilitation
- () Mission, Vision, and Values of DRS
- () Staff roles in rehabilitation process
 - Local office
 - Regional office
 - Central office
- () Agency structure and divisional functions (Commissioner's Office, CBS, DDS, Fiscal, IT, HR, Policy & Planning, WWRC, Grants and Special Programs)
Special Programs
- () Training and staff development opportunities
- () Travel regulations
- () Monthly reporting
- ()
- ()
- ()
- ()

OVERVIEW OF DRS

- () Process and purpose of DRS services
- () Order of Selection
- () DRS in partnership with community agencies
 - Networking
- () Confidentiality, HIPAA, Code of Ethics, Diversity
- () Appeals process
- () Forms, manuals, AWARE, and DRS resources
- () Community resources
- ()
- ()
- ()
- ()

Suggested training resources/strategies in addition to NCST:

- *CRC Code of Ethics*
- *Give sample scenarios regarding confidentiality/ethical issues and discuss*
- *Intranet for manuals and forms*
- *VR process flow chart*
- *Community resource visits*
- *Policy manual review/chapters relevant to OOS, confidentiality, appeals process*
- *Clarify who new counselor should go to for questions/advice*

INITIAL INTAKE, APPLICATION, AND DIAGNOSTIC ACTIVITIES

- () The referral process
- () Developing partnerships with community agency referral sources
- () Initial interview
- () Guidance & Counseling during Application
- () Documentation of referral/intake/application
- ()
- ()
- ()
- ()

Suggested training resources/strategies in addition to NCST:

- *Observe several seasoned counselors doing initial interviews and associated documentation*
- *Case file reviews focusing on the intake/application documentation*
- *Provide a sample of completed forms that may be utilized in the referral/application process*
- *Policy manual review/chapters relevant to referral and application*
- *Discussion of policies with manager or designee*
- *New counselor creates a script in order to role-play the 'explanation of services' to a consumer*
- *Role play describing DRS purpose, confidentiality, financial need, eligibility, OOS*
- *Referral source visits*

ELIGIBILITY

- () Client eligibility determination criteria and process
- () Diagnostics/assessments
 - Use of existing information
 - Assessment of eligibility vs. determination of vocational goal
 - Factors to consider in a thorough diagnostic study
- () Trial Work Experience
- () Extended Evaluation
- () Serious Functional Limitations determination/use of SFL checklist
- () Ineligibility
- () Guidance & Counseling during eligibility
- () Documentation of eligibility
- ()
- ()
- ()
- ()

Suggested training resources/strategies in addition to NCST:

- *Job shadow with seasoned counselors working through eligibility determination*
- *Case file reviews focusing on the intake/application forms and casenotes*
- *Provide sample of medical documents that might be found in case files; review and discuss.*
- *Establish a list of community resources for diagnostics and assessments*
- *Policy manual review/chapters relevant to diagnostics, assessments, disability, and eligibility*
- *Discussion of policies with manager or designee*

- *Referral source visits*

VOCATIONAL EVALUATION

- () Making an effective referral for vocational evaluation
- () Case staffing benefits
- () Informing the consumer about vocational evaluation
- () Roles of the vocational evaluator
- () Types of assessments/instruments available
- () Local evaluations vs. WWRC evaluations
- ()
- ()
- ()
- ()

Suggested training resources/strategies in addition to NCST

- *It is highly recommended that the new counselor participate in the vocational evaluation process with their local vocational evaluator to experience the assessments for which they will refer consumers*
- *Review vocational evaluation reports on several consumers and how the information was used for plan development*

REHABILITATION ENGINEERING/ASSISTIVE TECHNOLOGY

- () Making an effective referral for rehabilitation engineering, computer accommodations, occupational therapy
- () Roles of the various AT staff
- () Types of assessments/services available
- () Local services vs. WWRC services
- ()
- ()
- ()
- ()

Suggested training resources/strategies in addition to NCST

- *Meet with relevant AT staff in the local area to learn what they do; how to refer; try out some AT devices*
- *Review cases where AT has been used including home modification, vehicle modification, worksite modification/accommodation*

EMPLOYMENT PLAN DEVELOPMENT AND IMPLEMENTATION

- () Evaluating case facts for effective plan development
- () Informed choice
- () Developing an appropriate vocational goal and time frame
- () Counseling and guidance IPEs
- () Physical restoration Services
- () Training IPE
- () Amendments
- () Plan reviews
- () Documentation for plan development and implementation of services

- ()
- ()
- ()
- ()

Suggested training resources/strategies in addition to NCST:

- *Observe several seasoned counselors working with a consumer during plan development*
- *Case file reviews focusing on the IPE document and casenotes*
- *Provide samples of different plans especially if not available on new counselor's caseload – showing physical restoration, C & G, college, supported employment, JCTS, WWRC, OJT, UWE, other training*
- *Review local services, WWRC services, and comparable benefits*
- *Policy manual review/chapters relevant to Plan development and Plan contents*
- *Discussion of policies with manager or designee*
- *Meet service providers/vendors in community*

FISCAL MANAGEMENT

- () Determining financial need
- () Comparable benefits
- () Managing case services budgets – monthly budget projection; authorization aging
- () Prior approval levels
- () Authorizations and payments
- () RS-13
- () RS-25
- ()
- ()
- ()
- ()

Suggested training resources/strategies in addition to NCST:

- *Case file reviews focusing on the RS-13*
- *Practice mock work ups for several scenarios on a RS-13*
- *Observe seasoned counselors creating a monthly budget*
- *Create monthly budget for new counselor's caseload with assistance*
- *Create 'cheat sheet' with commonly used services/vendors and associated service costs*
- *Policy manual review/chapters relevant to financial need and purchasing*
- *Discussion of policies with manager or designee*
- *Contact Education Services Unit coordinator for training on RS-25*

JOB PLACEMENT AND FOLLOW-UP

- () Roles and responsibilities in placement
 - Counselor; consumer, job placement counselor, business developer, business development manager
- () Job placement and follow up practices
- () DRS Business Services
 - Staffing and recruitment; Workplace Accommodations; Disability Awareness Training; Financial Incentives
- () Agency marketing resources

- () Use of Employment Resource Center (ERC)
- () Americans with Disabilities Act basics
- () Commonwealth Workforce Network
- () Criteria for successful case closure
- ()
- ()
- ()
- ()

Suggested training resources/strategies in addition to NCST:

- *Job shadow with seasoned counselors/job placement staff during job placement*
- *Case file reviews focusing on the job placement process and casenotes*
- *Policy manual review/chapters relevant to job placement/employment*
- *Discussion of policies with manager or designee*
- *Attend Workforce Network meetings*
- *Meet with job placement counselor, job developer, Business Development Manager to learn roles and responsibilities and referral process*
- *Complete comprehensive tour of ERC with program support tech sr.- try out several software applications/on-line resources*

CASE CLOSURE/POST EMPLOYMENT

- () Case closure – rehab
- () Case closures – other
- () Discussing case closure with the consumer
- () Post – employment services
- ()
- ()
- ()
- ()

Suggested training resources/strategies in addition to NCST:

- *Job shadow with seasoned counselors carrying out case closure activities*
- *Closed case file reviews focusing on closures from application, extended evaluation, eligibility, services, and employment and associated forms and casenotes*
- *Case file reviews of current cases in post-employment*
- *Policy manual review/chapters relevant to case closures and post employment*

CASELOAD MANAGEMENT

- () Case flow leading to successful employment outcomes
 - monitoring and managing inputs and outputs to assure performance goals achieved
- () Effective consumer engagement and involvement
 - educating and partnering with the consumer
 - use of 'homework' to facilitate consumer participation
- () Effective planning, prioritizing, and scheduling of work activity
 - caseload review practices
 - paperwork/documentation management
 - itinerary management
 - scheduling using a calendar/Outlook

- () Effective case analysis and decision making
- () Time management and organization
- ()
- ()
- ()
- ()

Suggested training resources/strategies in addition to NCST:

- Interview counselors using effective caseload management systems to get ideas of strategies and styles
- Begin calendar use practices from the beginning
- Shadow caseload review/planning session with manager/other counselors
- Discussion of support staff roles and delegation
- Interview counselors to discuss decision making strategies
- Manager carryout caseload review with new counselor, schedule casework activity, and follow up weekly on progress

MISCELLANEOUS SKILLS, KNOWLEDGE, AND COMPETENCIES

- () Woodrow Wilson Rehabilitation Center
 - programs and services; referral/application/admissions process
- () Serving consumers with Brain Injury
- () Transition Services for students with disabilities
- () Serving consumers with Serious Mental Illness
- () Medical Consultant Services and Process
- () Job Coach Training Services, Supported Employment, Long Term Follow-Along Services
- () Serving consumers with Substance Abuse
- () Serving consumers with Hearing Loss/Deafness
- () Workforce Investment Act and One Stop Centers
- () Ticket to Work

AWARE AND COMPUTER SKILLS

Use of the AWARE System

- ⌘ Prerequisites:
 - ⌘ Basic understanding of desktop or laptop operation including Windows,
 - ⌘ Basic understanding of DSA Network security requirements including logging onto network and logging onto Accessible Web-based Activity and Reporting Environment (AWARE)
 - ⌘ For remote access
 - How to use laptop wireless connection capabilities from remote sites that have Internet access
 - Basic understanding of how to use Virtual Private Network (VPN)
 - How to use broadband access cards (Verizon, Sprint) to access an Internet connection.
- ⌘ AWARE Participant Module
 - ⌘ Copy of Manual and other documentation for AWARE provided for counselor
 - ⌘ Introduction to AWARE menu system and navigation to screens
 - ⌘ AWARE data entry for Referral & Application

- ✘ Use of Screen Print for hard copy documentation
- ✘ Use of Edit|Copy|Paste Command for word processor (also see checklist for Word 6.0)
- ✘ AWARE data entry for diagnostic services prior to IPE
- ✘ AWARE data entry for Eligibility
- ✘ AWARE data entry for IPE using new Laser Print Entry Program
 - Review Dates Screen
 - Planned Services Entry including entry for Comparable Benefits
 - Printing IPE Page 1 and Planned Services to Laser Printer
- ✘ AWARE data entry for Status Changes
- ✘ AWARE data entry for Substantial Amendments and Cloning
- ✘ Running basic Inquiries and Reports
- ✘ AWARE entry prior to Closure (including employer entry screen)
- ✘ AWARE data entry for Closure Rehabilitated and 90 Follow-up
- ✘ Orientation to office's procedures for documentation and filing of printed information
- ✘ **AWARE Authorizations**
 - ✘ Copy of Manual and other documentation for AWARE provided for counselor
 - ✘ AWARE data entry for Single Authorization to Vendor
 - ✘ AWARE data entry for Multiple Authorizations to same Vendor
 - ✘ Printing of single authorizations on demand
 - ✘ Group Authorizations
 - ✘ Inquiry and Reports for Authorizations
 - ✘ Understanding of office procedures for printing and filing authorizations
 - ✘ Maintenance of outstanding authorizations upon closure

Computer Skills

- ✘ **Windows (required)**
 - ✘ Introduction to Windows
 - ✘ Intro./orientation to counselor's PC and LAN/WAN
- ✘ **Basic File Management (required)**
 - ✘ Intro. to use of File Manager and File Management Protocols
 - ✘ File|Open Command for retrieving existing files
 - ✘ File|New Command for using Word 6.0 Templates
 - ✘ Intro to difference between Word 6.0 Templates and Files
 - ✘ File|Save as command for naming and saving files
 - ✘ Protocol for naming and using Participant Directories
 - ✘ Protocol for naming and saving participant files
 - ✘ Protocol for backing up files
 - ✘ Mentor/Local Office AWARE Expert identified for help in counselor's office
 - ✘ Orientation to and use of basic files and templates provided by office staff
 - ✘ Orientation to hard copy requirements (printing and filing) by office staff
- ✘ **MS Word Basic Level (required):**
 - ✘ Keyboarding Skills: typing at sufficient speed and accuracy
 - ✘ Adaptive requirements, if needed (dictation program, special keyboarding or other workstation adaptations attended to)
 - ✘ Basic word processing skills
 - ✘ typing on the blank page (normal.dot), use of word-wrap, creating paragraphs, moving around
 - ✘ Basic View commands: page layout and Zoom display options
 - ✘ Setting page margins & orientation
 - ✘ Basic Insertion commands: Insert Date/Time, page break, page numbers
 - ✘ Basic-formatting commands: font, paragraph, tabs
 - ✘ Basic tools: Spell Checker, Thesaurus, and AutoCorrect

- ✘ Highlighting techniques with mouse and keyboard
- ✘ Basic-editing commands: Copy, Cut, Paste, Undo
- ✘ Using a basic fill-in form (W60 protected form)
- ✘ Using an existing document (form letter, outline)
- ✘ Basic print command and print preview
- ✘ Use of on-line Help and Examples and Demos program
- ✘ Use of toolbar shortcuts and reading the ruler

- ✘ **Word Intermediate Level (highly recommended):**
(To make the best use of the automated features of AWARE and Word for participant documentation and processing requirements, the following are needed:
 - ✘ Prerequisites: Word 6.0 Level 1 training or competency (see above)
 - ✘ Creation and management of W60 Templates
 - ✘ Review of file management and backup strategies
 - ✘ Creating and using Autotext entries
 - ✘ Extended highlighting techniques and Quick Menu (right mouse button)
 - ✘ Work with multiple files simultaneously
 - ✘ Work with multiple applications simultaneously: File Manager, W60, AWARE
 - ✘ Copying information from a AWARE screen to a Word 6.0 document
 - ✘ Creating and using Tables, including calculation of a column of numbers, autoformats, and wizards
 - ✘ Extended Edit|Undo and Re-do
 - ✘ Un-protecting/re-protecting a fill-in form to customize or use as a regular file
 - ✘ Intermediate formatting features: bullets and numbering, headers/footers
 - ✘ Extended printing and previewing commands
 - ✘ Extended Zoom commands
 - ✘ Using the ruler for tabs, indents, and margins

- ✘ **Word Advanced Level (Optional):**
Objectives vary depending on the participants' level of competency and needs. Some of the objectives include:
 - ✘ Creating, modifying, and correcting protected forms
 - ✘ Correcting and modifying tables, and table design
 - ✘ Template and file management on a network
 - ✘ Using Macros for automated commands and automated processing
 - ✘ Mail Merge for labels and form letters
 - ✘ Extended use of right mouse button
 - ✘ Extended use of AWARE and W60 simultaneously
 - ✘ Use of Word 6.0 and the Internet/Intranet

- ✘ **Intranet Forms Cabinet**
 - ✘ Word documents provided with instructions for use
 - Referral forms for evaluation, medical information, etc., and cover letters
 - Certificate of Eligibility
 - Appointment & Contact Letters
 - Vocational Diagnostic Interview
 - ✘ Excel files provided with instructions for use

- ✘ **Use of Outlook**
 - ✘ Mail
 - ✘ Calendar
 - ✘ Tasks
 - ✘ Outlook FORMS

INDIVIDUALIZED SKILLS & COMPETENCIES CHECKLIST

The following are additional areas of knowledge, skills, and abilities necessary for this counselor serving this caseload:

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COUNSELOR SIGNATURE/ DATE

HUMAN SERVICES MANAGER SIGNATURE / DATE