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# E&R Assessment Milestone Forms List

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## Required Case Documentation for Payment of ER AS Milestone:

- ® **ESS-C-117**—*Travel Log and Invoice* (when travel is authorized, see D. Milestone Rates)
- ® **ESS-C-133**—*DRS Counselor Monthly Update Form(s)* - required only when **ER AS Milestone** lasts more than one (1) month from date of referral (e-mail the form each month to **DRS Counselor**; submit separately from milestone documentation)
- ® **ESS-C-139**—*Situational Assessment Report* (when Situational Assessment is completed as one of the two required assessments)
- ® **ESS-C-161**—*Job Analysis* (when Situational Assessment is completed)
- ® **ESS-C-274**—*ER Authorization Request and Milestone Billing Form*
- ® **ESS-C-278**—*Plan for Assessment*
- ® **ESS-C-281n**—DRS Counselor response to **ESS-C-278**—*Plan for Assessment* (if received, **DRS Counselor** has 5 business days to reply to e-mailed **ESS-C-278**—*Plan for Assessment*)
- ® **ESS-C-285n**—*Electronic Résumé* (e-mail to **DRS Counselor**)
- ® **ESS-C-289n**—*Job Description* (when in-house Situational Assessment is completed)
- ® **ESS-C-297**—*Compatibility Analysis* (when Situational Assessment is completed)
- ® **ESS-C-305n**—*Customized Assessment(s)* (when completed as one of the two required assessments)
- ® **ESS-C-310**—*Assessment Milestone Report* (counts as DRS Monthly Update or final monthly update for ER AS Milestone when milestone extends beyond one month)
- ® **ESS-C-329**—*Comprehensive Vocational Profile* (when completed as one of the two required assessments)

**Legend: ® = Required**

**® = required, if applicable**

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## Required Case Documentation for Payment of ER VP Milestone:

- ® ESS-C-117**—*Travel Log and Invoice* (when travel is authorized, see D. Milestone Rates)
- ® ESS-C-133**—*DRS Counselor Monthly Update Form(s)* - required only when ER VP Milestone lasts more than one (1) month (e-mail the form each month to DRS Counselor; submit separately from milestone documentation)
- ® ESS-C-274**—*ER Authorization Request and Milestone Billing Form*
- ® ESS-C-317n**—Copies of summary pages from vocational interest inventories
- ® ESS-C-321**—*Job Club Sign-In Sheet*
- ® ESS-C-325**—*Copy of Certificate of Completion* (issued to individual)

**Legend: ® = Required**

**® = required, if applicable**

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## Required Case Documentation for Payment of ER PL Milestone:

- ® **ESS-C-117**—*Travel Log and Invoice* (when travel is authorized, see D. Milestone Rates)
- ® **ESS-C-133**—*DRS Counselor Monthly Update Form(s)* - required only when **ER PL Milestone** lasts more than one (1) month (e-mail the form each month to DRS Counselor; submit separately from milestone documentation)
- ® **ESS-C-157**—*Pre-Placement Information Form* - submit prior to or on the start date of the initial job only, e-mail to DRS Counselor and Cc ESS TA
- ® **ESS-C-161**—*Job Analysis* (completed before first (1<sup>st</sup>) day of work, only when EC is requested onsite by individual) (for initial placement)
- ® **ESS-C-166**—*Placement Report* (counts as DRS Monthly Update or final monthly update if ER PL milestone extends beyond one month)
- ® **ESS-C-185**—*Job Accommodation Form* (for initial placement)
- ® **ESS-C-213n**—Prior to or on start date, **ONLY** when hired by the Contractor, **O\*NET median hourly wage documentation** for the region or city where the job is located; (e-mail to the DRS Counselor and Cc ESS TA)
- ® **ESS-C-274**—*ER Authorization Request and Milestone Billing Form*

## If termination and/or replacement occurs:

- ® **ESS-C-181**—Termination/Re-Placement Report - upon Contractor notice of termination, (e-mail to DRS Counselor and Cc ESS TA)
- ® **ESS-C-181**—Termination/Re-Placement Report - prior to or on start date of re-placement, update the above form with new job information; (e-mail to DRS Counselor and Cc ESS TA)
- ® **ESS-C-161**—*Job Analysis* (completed before first (1<sup>st</sup>) day of work) (only for re-placement when onsite supports requested by individual)
- ® **ESS-C-185**—*Job Accommodation Form*

**Legend: ® = Required**

**® = required, if applicable**

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## E&R R4 (4 Week Retention) Milestone Forms List (Optional)

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### Required Case Documentation for Payment of ER R4 Milestone:

- ® **ESS-C-117**—*Travel Log and Invoice* (when travel is authorized, see D. Milestone Rates)
- ® **ESS-C-133**—*DRS Counselor Monthly Update Form(s)* - required only when **ER R4 Milestone** lasts more than one (1) month (e-mail the form each month to DRS Counselor; submit separately from milestone documentation)
- ® **ESS-C-185**—*Job Accommodation Form* (submit only if new accommodations are implemented or changed during this milestone)
- ® **ESS-C-225**—*Record of Hours Worked*
- ® **ESS-C-237n**—Current Paystub/Earnings Statement
- ® **ESS-C-274**—*ER Authorization Request and Milestone Billing Form*
- ® **ESS-C-338**—*R4 Milestone Report* (counts as **DRS Monthly Update** or **final monthly update** if ER R4 milestone extends beyond one month)

### If termination and/or replacement occurs:

- ® **ESS-C-181**—**Termination/Re-Placement Report - upon Contractor notice of termination**, (e-mail to DRS Counselor **and Cc** ESS TA)
- ® **ESS-C-181**—**Termination/Re-Placement Report - prior to or on start date of re-placement, update the above form with new job information**; (e-mail to DRS Counselor **and Cc** ESS TA)
- ® **ESS-C-161**—*Job Analysis* (completed before first (1<sup>st</sup>) day of work) (only for re-placement when onsite supports requested by individual)
- ® **ESS-C-185**—*Job Accommodation Form*

**Legend: ® = [Required](#)**

**® = required, if applicable**

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## Required Case Documentation for Payment of ER EM Milestone:

- ® ESS-C-117**—*Travel Log and Invoice* (when travel is authorized, see D. Milestone Rates)
- ® ESS-C-133**—*DRS Counselor Monthly Update Form (1<sup>st</sup>)* (e-mail first monthly update to DRS Counselor as an attachment; submit separately from milestone documentation)
- ® ESS-C-133**—*DRS Counselor Monthly Update Form (2<sup>nd</sup>)* (e-mail second monthly update to DRS Counselor as an attachment; submit separately from milestone documentation)
- ® ESS-C-225**—*Record of Hours Worked*
- ® ESS-C-237n**—*Current Paystub/Earnings Statement*
- ® ESS-C-249**—*Employee Satisfaction Survey*
- ® ESS-C-266**—*Employment Outcome Report* (counts as 3<sup>rd</sup> and final DRS Monthly Update for ER EM milestone)
- ® ESS-C-274**—*ER Authorization Request and Milestone Billing Form*

## If termination and/or replacement occurs:

- ® ESS-C-181**—*Termination/Re-Placement Report - upon Contractor notice of termination*, (e-mail to DRS Counselor and Cc ESS TA)
- ® ESS-C-181**—*Termination/Re-Placement Report - prior to or on start date of re-placement, update the above form with new job information*; (e-mail to DRS Counselor and Cc ESS TA)
- ® ESS-C-161**—*Job Analysis* (completed before first (1<sup>st</sup>) day of work) (only for re-placement when onsite supports requested by individual)
- ® ESS-C-185**—*Job Accommodation Form*

**Legend: ® = Required**

**® = required, if applicable**

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## Required Case Documentation for Payment of ESA Service:

- ® ESS-C-117**—*Travel Log and Invoice* (when travel is authorized, see C. Service Rates)
- ® ESS-C-133**—*DRS Counselor Monthly Update Form(s)* - required only if ESA extends beyond one (1) month of referral date; (e-mail to DRS Counselor separately from Required Case Documentation for Payment)
- ® ESS-C-345**—*ESS Authorization Request & Billing Form*
- ® ESS-C-349**—*ESS Assessment Referral*
- ® ESS-C-353-(1-8)**—Copies of all ESS Assessment(s) (completed as requested on the ESS-C-349—ESS Assessment Referral)

## The following as requested on ESS-C-349—ESS Assessment Referral:

- ® ESS-C-353-1**—*ESS Assessment - Cognitive Assessment*
- ® ESS-C-353-2**—*ESS Assessment - Communication Assessment*
- ® ESS-C-353-3**—*ESS Assessment - Computer Technology Assessment*
- ® ESS-C-353-4**—*ESS Assessment - Daily Living Assessment*
- ® ESS-C-353-5**—*ESS Assessment - Housing Assessment*
- ® ESS-C-353-6**—*ESS Assessment - Mobility Assessment*
- ® ESS-C-353-7**—*ESS Assessment - Work/Training Tolerance Assessment*
- ® ESS-C-353-8**—*ESS Assessment - Transportation Assessment*
- ® ESS-C-353-9**—*ESS Assessment Summary*

**Legend: ® = Required**

**® = required, if applicable**

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## Required Case Documentation for Payment of SSE Service:

- ® ESS-C-117**—*Travel Log and Invoice* (when travel is authorized, see C. Service Rates)
- ® ESS-C-133**—*DRS Counselor Monthly Update Form(s)* - required only if SSE extends beyond one (1) month; (e-mail to DRS Counselor separately from Required Case Documentation for Payment)
- ® ESS-C-345**—*ESS Authorization Request & Billing Form*
- ® ESS-C-357**—*ESS Training Support Plan* (e-mail to DRS Counselor for approval)
- ® ESS-C-358n**—Copy of e-mail to DRS Counselor with ESS-C-357—ESS Training Support Plan (retain in case file)
- ® ESS-C-361n**—Copy of DRS Counselor Approval e-mail of ESS-C-357—ESS Training Support Plan
- ® ESS-C-365**—*ESS Training Support Summary*

**Legend: ® = Required**

**® = required, if applicable**

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### Required Case Documentation for Payment of JP AS Milestone:

- ®** ESS-C-117—*Travel Log and Invoice* (when travel is authorized, see C. Milestone Rates)
- ®** ESS-C-133—*DRS Counselor Monthly Update Form(s)* - required only when JP AS Milestone lasts more than one (1) month from referral date (e-mail the form each month to DRS Counselor; submit separately from milestone documentation)
- ®** ESS-C-285n—*Electronic Résumé* (e-mail to DRS Counselor)
- ®** ESS-C-310—*Assessment Milestone Report* (counts as DRS Monthly Update when JP AS milestone is completed within one month of referral)
- ®** ESS-C-369—*JP Authorization Request & Billing Form*
- ®** ESS-C-377n—*Assessment results including potential job matches*

**Legend: ® = Required**

**® = required, if applicable**

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## Required Case Documentation for Payment of JP PL Milestone:

- ® **ESS-C-117**—*Travel Log and Invoice* (when travel is authorized, see C. Milestone Rates)
- ® **ESS-C-133**—*DRS Counselor Monthly Update Form(s)* - required only when **JP PL Milestone lasts more than one (1) month** (e-mail the form each month to DRS Counselor; submit separately from milestone documentation)
- ® **ESS-C-157**—*Pre-Placement Information Form* – submit prior to or on the start date of the **initial job only**, e-mail to DRS Counselor **and Cc** ESS TA
- ® **ESS-C-161**—*Job Analysis* (completed before first (1st) day of work, **ONLY** when EC is requested onsite by individual)
- ® **ESS-C-166**—*Placement Milestone Report* (counts as **DRS Monthly Update** or **final monthly update** if JP PL milestone extends beyond one month)
- ® **ESS-C-185**—*Job Accommodation Form* (for initial placement)
- ® **ESS-C-213n**—Prior to or on start date, **ONLY** when hired by the Contractor, **O\*NET median hourly wage documentation** for the region or city where the job is located; (e-mail to the DRS Counselor **and Cc** ESS TA)
- ® **ESS-C-369**—*JP Authorization Request and Billing Form*

## If termination and/or replacement occurs:

- ® **ESS-C-181**—Termination/Re-Placement Report - upon Contractor notice of termination, (e-mail to DRS Counselor **and Cc** ESS TA)
- ® **ESS-C-181**—Termination/Re-Placement Report - prior to or on start date of re-placement, update the above form with new job information; (e-mail to DRS Counselor **and Cc** ESS TA)
- ® **ESS-C-161**—*Job Analysis* (completed before first (1<sup>st</sup>) day of work) (only for re-placement when onsite supports requested by individual)
- ® **ESS-C-185**—*Job Accommodation Form*

**Legend: ® = Required**

**® = required, if applicable**

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## Required Case Documentation for Payment of JP EM Milestone:

- ® ESS-C-117**—*Travel Log and Invoice* (when travel is authorized, see C. Milestone Rates)
- ® ESS-C-133**—*DRS Counselor Monthly Update Form - (1<sup>st</sup>)* (e-mail **first** monthly update to DRS Counselor as an attachment; submit separately from milestone documentation)
- ® ESS-C-133**—*DRS Counselor Monthly Update Form - (2<sup>nd</sup>)* (e-mail **second** monthly update to DRS Counselor as an attachment; submit separately from milestone documentation)
- ® ESS-C-225**—*Record of Hours Worked*
- ® ESS-C-237n**—*Current Paystub/Earnings Statement*
- ® ESS-C-249**—*Employee Satisfaction Survey*
- ® ESS-C-266**—*Employment Outcome Report* (counts as **3<sup>rd</sup>** and **final DRS Monthly Update** for JP EM milestone)
- ® ESS-C-369**—*JP Authorization Request & Billing Form*

## If termination and/or replacement occurs:

- ® ESS-C-181**—**Termination/Re-Placement Report - upon Contractor notice of termination**, (e-mail to DRS Counselor **and Cc** ESS TA)
- ® ESS-C-181**—**Termination/Re-Placement Report - prior to or on start date of re-placement, update the above form with new job information**; (e-mail to DRS Counselor **and Cc** ESS TA)
- ® ESS-C-161**—*Job Analysis* (completed before first (1<sup>st</sup>) day of work) (**only** for re-placement, if applicable)
- ® ESS-C-185**—*Job Accommodation Form*

**Legend: ® = Required      ® = required, if applicable**

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## Required Case Documentation for Payment of JOBS Service:

- ® **ESS-C-117**—*Travel Log and Invoice* (when travel is authorized, see C. Payment Rate)
- ® **ESS-C-133**—*DRS Counselor Monthly Update Form(s)*
- ® **ESS-C-157**—*Pre-Placement Information Form* – **submit prior to or on the start date of the initial job only**, e-mail to DRS Counselor **and Cc** ESS TA
- ® **ESS-C-185**—*Job Accommodation Form* (if applicable)
- ® **ESS-C-213n**—**Prior to or on start date**, **ONLY** when hired by the Contractor, **O\*NET median hourly wage documentation for the region or city where the job is located**; (e-mail to the DRS Counselor **and Cc** ESS TA)
- ® **ESS-C-285n**—*Electronic Résumé* (e-mail to DRS Counselor)
- ® **ESS-C-389**—*JOBS 60 Day Completion Report*
- ® **ESS-C-394**—*JOBS Authorization Request & Billing Form*

## If termination and/or replacement occurs:

- ® **ESS-C-181**—**Termination/Re-Placement Report - upon Contractor notice of termination**, (e-mail to DRS Counselor **and Cc** ESS TA)
- ® **ESS-C-181**—**Termination/Re-Placement Report - prior to or on start date of re-placement, update the above form with new job information**; (e-mail to DRS Counselor **and Cc** ESS TA)
- ® **ESS-C-185**—*Job Accommodation Form* (if applicable)

Legend: ® = Required      ® = required, if applicable

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# SES Career Exploration (CAEX) Forms List

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## Required Case Documentation for Payment of SES Career Exploration:

- ® **ESS-C-117**—*Travel Log and Invoice* (when travel is authorized, see D. Service Rates)
- ® **ESS-C-133**—*DRS Counselor Monthly Update Form(s)* - required only when **SES CA EX lasts more than one (1) month** (e-mail the form each month to DRS Counselor; submit separately from milestone documentation)
- ® **ESS-C-137**—*Plan of Career Exploration*
- ® **ESS-C-141**—*Career Exploration Report(s)*
- ® **ESS-C-145n**—DRS Counselor Response to **ESS-C-137—Plan of Career Exploration**
- ® **ESS-C-149n**—Contractor's Written Justification for completing **less than three (3)** different activities (if applicable)
- ® **ESS-C-153n**—DRS Counselor Written Approval for completing **less than three (3)** different activities (if applicable)
- ® **ESS-C-801**—*SES Authorization Request & Billing Form*

**Legend: ® = Required**

**® = required, if applicable**

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## SES Internship (INT) Forms List

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### Required Case Documentation for Payment of 1<sup>st</sup> month of SES Internship:

- ® ESS-C-117**—*Travel Log and Invoice* (when travel is authorized, see D. Service Rates)
- ® ESS-C-133**—*DRS Counselor Monthly Update Form* (required with first month's billing)
- ® ESS-C-157**—*Pre-Placement Information Form* (**Prior to start date of internship**, e-mail to DRS Counselor **and Cc** ESS TA)
- ® ESS-C-161**—*Job Analysis* (completed during the first week of internship, and required with first month's billing)
- ® ESS-C-165**—*Internship Placement Report* (required with first month's billing)
- ® ESS-C-169**—*Internship Time Log(s)* (required with first month's billing)
- ® ESS-C-185**—*Job Accommodation Form* (required with first month's billing)
- ® ESS-C-197n**—*Internship Agreement Documentation*
- ® ESS-C-801**—*SES Authorization Request and Billing Form* (required with first month's billing)

### Monthly Required Case Documentation for Payment of SES Internship:

- ® ESS-C-117**—*Travel Log and Invoice* (when travel is authorized, See D. Service Rates)
- ® ESS-C-133**—*DRS Counselor Monthly Update Form* (required with each month's billing)
- ® ESS-C-169**—*Internship Time Log(s)* (required with each month's billing)
- ® ESS-C-801**—*SES Authorization Request and Billing Form* (required with each month's billing)

**Legend: ® = Required**

**® = required, if applicable**

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### Required Case Documentation for Final Payment of SES Internship:

- ® **ESS-C-117**—*Travel Log and Invoice* (when travel is authorized, See D. Service Rates)
- ® **ESS-C-133**—*DRS Counselor Monthly Update Form* (required with final billing)
- ® **ESS-C-157**—*Pre-Placement Information Form* (when hired permanently by Internship Employer) (e-mail to DRS Counselor **and Cc** ESS TA)
- ® **ESS-C-169**—*Internship Time Log(s)* (required with final billing)
- ® **ESS-C-173**—*Team Meeting Narrative* (required with final billing)
- ® **ESS-C-177**—*Placement Report* (required with final billing if hired by the Internship employer)
- ® **ESS-C-801**—*SES Authorization Request and Billing Form* (required with final billing)
- ® **ESS-C-810**—*Employee Performance Report* (required with final billing)

### If termination and/or replacement occurs:

- ® **ESS-C-181**—Termination/Re-Placement Report - upon Contractor notice of termination of internship, (e-mail to DRS Counselor **and Cc** ESS TA)
- ® **ESS-C-181**—Termination/Re-Placement Report - prior to or on start date of re-placement, update the above form with new internship information; (e-mail to DRS Counselor **and Cc** ESS TA)
- ® **ESS-C-161**—*Job Analysis* (completed prior to the first (1<sup>st</sup>) day of the new internship and required with first month's billing)
- ® **ESS-C-185**—*Job Accommodation Form*
- ® **ESS-C-197n**—*Internship Agreement Documentation*

**Legend:** ® = [Required](#)      ® = [required, if applicable](#)

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## Required Case Documentation for Payment of SES OST:

- ® ESS-C-117**—*Travel Log and Invoice* (when travel is authorized, see D. Service Rates)
- ® ESS-C-133**—*DRS Counselor Monthly Update Form* (required with each month's billing)
- ® ESS-C-173**—*Team Meeting Narrative(s)* (required every four months, as applicable)
- ® ESS-C-185**—*Job Accommodation Form* (required when updated)
- ® ESS-C-225**—*Record of Hours Worked* (required with each month's billing)
- ® ESS-C-229**—*Natural Supports Plan* (required when updated)
- ® ESS-C-237n**—*Current Pay Stub/Earnings Statement* (required with final billing)
- ® ESS-C-241**—*Onsite Supports and Training Report* (required with every Team Meeting and/or final billing)
- ® ESS-C-249**—*Employee Satisfaction Survey* (required with every Team Meeting and/or final billing)
- ® ESS-C-253**—*Extended Services Statement* (required with final billing)
- ® ESS-C-801**—*SES Authorization Request and Billing Form* (required with each month's billing)
- ® ESS-C-810**—*Employee Performance Report* (signed by the employer, and required with every Team Meeting and/or final billing)

**Legend: ® = Required**

**® = required, if applicable**

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### If termination and/or replacement occurs:

- ® **ESS-C-181**—Termination/Re-Placement Report - upon Contractor notice of termination, (e-mail to DRS Counselor **and Cc** ESS TA)
- ® **ESS-C-181**—Termination/Re-Placement Report - prior to or on start date of re-placement, update the above form with new job information; (e-mail to DRS Counselor **and Cc** ESS TA)
- ® **ESS-C-161**—*Job Analysis* (completed prior to the first (1<sup>st</sup>) day of work) (for re-placement)
- ® **ESS-C-185**—*Job Accommodation Form* (for re-placement)
- ® **ESS-C-229**—*Natural Supports Plan* (for re-placement)

**Legend: ® = Required**

**® = required, if applicable**

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## Required Case Documentation for Payment of SES EST:

- ® **ESS-C-117**—*Travel Log and Invoice* (when travel is authorized, see D. Service Rates)
- ® **ESS-C-133**—*DRS Counselor Monthly Update Form(s)* (required monthly, except in months when Team Meetings are held)
- ® **ESS-C-173**—*Team Meeting Narrative(s)* (required every 6 months)
- ® **ESS-C-185**—*Job Accommodation Form* (required when updated)
- ® **ESS-C-225**—*Record of Hours Worked* (required with each month's billing)
- ® **ESS-C-229**—*Natural Supports Plan* (required when updated)
- ® **ESS-C-237n**—*Current Pay Stub/Earnings Statement* (required with final billing)
- ® **ESS-C-249**—*Employee Satisfaction Survey* (required every 6 months when Team Meetings are held)
- ® **ESS-C-801**—*SES Authorization Request and Billing Form* (required monthly with billing)
- ® **ESS-C-810**—*Employee Performance Report* (signed by the employer, and required at every team meeting)

## If termination and/or replacement occurs:

- ® **ESS-C-181**—*Termination/Re-Placement Report - upon Contractor notice of termination*, (e-mail to DRS Counselor **and Cc** ESS TA)
- ® **ESS-C-181**—*Termination/Re-Placement Report - prior to or on start date of re-placement, update the above form with new job information*; (e-mail to DRS Counselor **and Cc** ESS TA)
- ® **ESS-C-161**—*Job Analysis* (completed prior to the first (1<sup>st</sup>) day of work) (for re-placement)
- ® **ESS-C-185**—*Job Accommodation Form* (for re-placement)
- ® **ESS-C-229**—*Natural Supports Plan* (for re-placement)

**Legend: ® = Required**

**® = required, if applicable**

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# SES Additional Placement Rates (APR) Forms List

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## Required Case Documentation for Payment of SES APR:

- ® **ESS-C-117**—*Travel Log and Invoice* (when travel is authorized, see D. Service Rates)
- ® **ESS-C-133**—*DRS Counselor Monthly Update Form(s)* (required each month between termination and re-placement)
- ® **ESS-C-181**—*Termination/Re-Placement Report - prior to or on start date of re-placement, update the form with new job information;* (e-mail to DRS Counselor and Cc ESS TA)
- ® **ESS-C-185**—*Job Accommodation Form* (required for each re-placement)
- ® **ESS-C-229**—*Natural Supports Plan* (required for each re-placement)
- ® **ESS-C-801**—*SES Authorization Request and Billing Form* (required for each re-placement)

## If termination and/or replacement occurs:

- ® **ESS-C-181**—*Termination/Re-Placement Report - upon Contractor notice of termination,* (e-mail to DRS Counselor and Cc ESS TA)
- ® **ESS-C-181**—*Termination/Re-Placement Report - prior to or on start date of re-placement, update the above form with new job information;* (e-mail to DRS Counselor and Cc ESS TA)
- ® **ESS-C-161**—*Job Analysis* (completed prior to the first (1<sup>st</sup>) day of work) (for re-placement)
- ® **ESS-C-185**—*Job Accommodation Form* (for re-placement)
- ® **ESS-C-229**—*Natural Supports Plan* (for re-placement)

**Legend: ® = Required**

**® = required, if applicable**

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# SE Assessment Milestone Forms List

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## Required Case Documentation for Payment of SE AS Milestone:

- ® **ESS-C-117**—*Travel Log and Invoice* (when travel is authorized, see D. Milestone Rates)
- ® **ESS-C-133**—*DRS Counselor Monthly Update Form(s)* – required only when SE AS Milestone lasts more than one (1) month from date of referral (e-mail the form each month to DRS Counselor; submit separately from milestone documentation)
- ® **ESS-C-139**—*Situational Assessment Report*
- ® **ESS-C-139n**—DRS Counselor e-mail/written Response to Plan for Assessment, when received (required when both assessments are NOT related to the IPE vocational goal)
- ® **ESS-C-161**—*Job Analysis*
- ® **ESS-C-278**—*Plan for Assessment*
- ® **ESS-C-289n**—Job Description (required when in-house situational assessment is completed)
- ® **ESS-C-297**—*Compatibility Analysis*
- ® **ESS-C-310**—*Assessment Milestone Report* (counts as DRS Monthly Update or final monthly update if SE AS milestone extends beyond one month)
- ® **ESS-C-398**—*SE Authorization Request and Milestone Billing Form*
- ® **ESS-C-413**—*Intensive Support Criteria Form with documentation* (when applicable, e-mail to DRS Counselor; e-mail to ESS TA only if choosing “Other” on the form)

Legend: ® = Required

® = required, if applicable

[SE AS Forms List](#)

## SE Vocational Preparation Milestone Forms List (Optional)

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### Required Case Documentation for Payment of SE VP Milestone:

- ® ESS-C-117**—*Travel Log and Invoice* (when travel is authorized, see D. Milestone Rates)
- ® ESS-C-133**—*DRS Counselor Monthly Update Form(s)* - required only when **SE VP Milestone** lasts more than one (1) month (e-mail the form each month to DRS Counselor; submit separately from milestone documentation)
- ® ESS-C-317n**—Copies of summary pages from vocational interest inventories
- ® ESS-C-321**—*Job Club Sign-In Sheet*
- ® ESS-C-325**—*Copy of Certificate of Completion* (issued to individual)
- ® ESS-C-398**—*SE Authorization Request & Milestone Billing Form*

Legend: **® = Required**

**® = required, if applicable**

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## Required Case Documentation for Payment of SE PL Milestone:

- ® ESS-C-117—*Travel Log and Invoice* (when travel is authorized, see D. Milestone Rates)**
- ® ESS-C-133—*DRS Counselor Monthly Update Form(s)* - required only when SE PL Milestone lasts more than one (1) month (e-mail the form each month to DRS Counselor; submit separately from milestone documentation)**
- ® ESS-C-157—*Pre-Placement Information Form* – submit prior to or on the start date of the initial job only, e-mail to DRS Counselor and Cc ESS TA**
- ® ESS-C-161—*Job Analysis* (completed before first (1st) day of work) (for initial placement)**
- ® ESS-C-166—*Placement Milestone Report* (counts as DRS Monthly Update or final monthly update if SE PL milestone extends beyond one month)**
- ® ESS-C-185—*Job Accommodation Form* (for initial placement)**
- ® ESS-C-213n—Prior to or on start date, ONLY when hired by the Contractor, O\*NET median hourly wage documentation for the region or city where the job is located; (e-mail to the DRS Counselor and Cc ESS TA)**
- ® ESS-C-398—*SE Authorization Request & Billing Form***

## If termination and/or replacement occurs:

- ® ESS-C-181—Termination/Re-Placement Report - upon Contractor notice of termination, (e-mail to DRS Counselor and Cc ESS TA)**
- ® ESS-C-181—Termination/Re-Placement Report - prior to or on start date of re-placement, update the above form with new job information; (e-mail to DRS Counselor and Cc ESS TA)**
- ® ESS-C-161—*Job Analysis* (completed prior to the first (1<sup>st</sup>) day of work) (for re-placement)**
- ® ESS-C-185—*Job Accommodation Form* (for re-placement)**
- ® ESS-C-229—*Natural Supports Plan* (for re-placement)**

**Legend: ® = Required**

**® = required, if applicable**

[SE PL Forms List](#)

# SE R4 (Four Weeks Job Support) Milestone Forms List

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## Required Case Documentation for Payment of SE R4 Milestone:

- ® **ESS-C-117**—*Travel Log and Invoice* (when travel is authorized, see D. Milestone Rates)
- ® **ESS-C-133**—*DRS Counselor Monthly Update Form(s)* - required only when **SE R4 Milestone** lasts more than one (1) month (e-mail the form each month to DRS Counselor; submit separately from milestone documentation)
- ® **ESS-C-173**—*Team Meeting Narrative* (for Team Meeting required during final 2 weeks of SE R4)
- ® **ESS-C-185**—*Job Accommodation Form* (only if updated)
- ® **ESS-C-225**—*Record of Hours Worked*
- ® **ESS-C-229**—*Natural Supports Plan*
- ® **ESS-C-237n**—Current Pay Stub/Earnings Statement
- ® **ESS-C-338**—*R4 Milestone Report* (counts as DRS Monthly Update or final monthly update if SE R4 milestone extends beyond one month)
- ® **ESS-C-398**—*SE Authorization Request & Milestone Billing Form*

## If termination and/or replacement occurs:

- ® **ESS-C-181**—Termination/Re-Placement Report - upon Contractor notice of termination, (e-mail to DRS Counselor and Cc ESS TA)
- ® **ESS-C-181**—Termination/Re-Placement Report - prior to or on start date of re-placement, update the above form with new job information; (e-mail to DRS Counselor and Cc ESS TA)
- ® **ESS-C-161**—*Job Analysis* (completed prior to the first (1<sup>st</sup>) day of work) (for re-placement)
- ® **ESS-C-185**—*Job Accommodation Form* (for re-placement)
- ® **ESS-C-229**—*Natural Supports Plan* (for re-placement)

**Legend: ® = Required**

**® = required, if applicable**

[SE R4 Forms List](#)

# SE R8 (Eight Weeks Job Support) Milestone Forms List

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## Required Case Documentation for Payment:

- ® **ESS-C-117**—*Travel Log and Invoice* (when travel is authorized, see D. Milestone Rates)
- ® **ESS-C-133**—*DRS Counselor Monthly Update Form(s)* - required only when **SE R8 Milestone** lasts more than one (1) month (e-mail the form each month to DRS Counselor; submit separately from milestone documentation)
- ® **ESS-C-185**—*Job Accommodation Form* (only if updated)
- ® **ESS-C-225**—*Record of Hours Worked*
- ® **ESS-C-229**—*Natural Supports Plan* (only if updated)
- ® **ESS-C-233**—*Employer Verification* (signed by the employer)
- ® **ESS-C-249**—*Employee Satisfaction Survey*
- ® **ESS-C-398**—*SE Authorization Request & Milestone Billing Form*
- ® **ESS-C-425**—*SE R8 Milestone Report* (counts as DRS Monthly Update or final monthly update if SE R8 milestone extends beyond one month)

## If termination and/or replacement occurs:

- ® **ESS-C-181**—*Termination/Re-Placement Report* - upon Contractor notice of termination, (e-mail to DRS Counselor **and Cc** ESS TA)
- ® **ESS-C-181**—*Termination/Re-Placement Report* - prior to or on start date of re-placement, update the above form with new job information; (e-mail to DRS Counselor **and Cc** ESS TA)
- ® **ESS-C-161**—*Job Analysis* (completed prior to the first (1<sup>st</sup>) day of work) (for re-placement)
- ® **ESS-C-185**—*Job Accommodation Form* (for re-placement)
- ® **ESS-C-229**—*Natural Supports Plan* (for re-placement)

**Legend: ® = Required**

**® = required, if applicable**

[SE R8 Forms List](#)

# SE ST (Job Stabilization) 12- or 16-weeks Milestone Forms List

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## Required Case Documentation for Payment of SE ST Milestone:

- ® **ESS-C-117**—*Travel Log and Invoice* (when travel is authorized, see D. Milestone Rates)
- ® **ESS-C-133**—*DRS Counselor Monthly Update Form(s)* required only when SE ST milestone lasts more than one (1) month (e-mail the form each month to DRS Counselor; submit separately from milestone documentation)
- ® **ESS-C-173**—*Team Meeting Narrative* (for Team Meeting required during SE ST milestone)
- ® **ESS-C-225**—*Record of Hours Worked*
- ® **ESS-C-233**—*Employer Verification* (signed by the employer)
- ® **ESS-C-249**—*Employee Satisfaction Survey*
- ® **ESS-C-253**—EST Extended Services Statement
- ® **ESS-C-398**—*SE Authorization Request & Milestone Billing Form*
- ® **ESS-C-430**—*Stabilization Milestone Report* (report weeks nine through twelve (9-12) for Regular Support (Intensive Support will report weeks nine through sixteen (9-16) (counts as DRS Monthly Update or final monthly update if SE ST milestone extends beyond one month)

## If termination and/or replacement occurs:

- ® **ESS-C-181**—Termination/Re-Placement Report - upon Contractor notice of termination, (e-mail to DRS Counselor and Cc ESS TA)
- ® **ESS-C-181**—Termination/Re-Placement Report - prior to or on start date of re-placement, update the above form with new job information; (e-mail to DRS Counselor and Cc ESS TA)
- ® **ESS-C-161**—*Job Analysis* (completed prior to the first (1<sup>st</sup>) day of work) (for re-placement)
- ® **ESS-C-185**—*Job Accommodation Form* (for re-placement)
- ® **ESS-C-229**—*Natural Supports Plan* (for re-placement)

**Legend: ® = Required**

**® = required, if applicable**

[SE ST Forms List](#)

# SE EM (Successful Employment) Milestone Forms List

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## Required Case Documentation for Payment of SE EM Milestone:

- ® **ESS-C-117**—*Travel Log and Invoice* (when travel is authorized, see D. Milestone Rates)
- ® **ESS-C-133**—*DRS Counselor Monthly Update Form - (1<sup>st</sup>)* (e-mail first monthly update to DRS Counselor as an attachment; submit separately from milestone documentation)
- ® **ESS-C-133**—*DRS Counselor Monthly Update Form - (2<sup>nd</sup>)* (e-mail second monthly update to DRS Counselor as an attachment; submit separately from milestone documentation)
- ® **ESS-C-225**—*Record of Hours Worked*
- ® **ESS-C-237n**—*Current Pay Stub/Earnings Statement*
- ® **ESS-C-249**—*Employee Satisfaction Survey*
- ® **ESS-C-266**—*Employment Outcome Report* (counts as 3<sup>rd</sup> and final DRS Monthly Update for SE EM milestone)
- ® **ESS-C-398**—*SE Authorization Request & Milestone Billing Form*

## If termination and/or replacement occurs:

- ® **ESS-C-181**—*Termination/Re-Placement Report - upon Contractor notice of termination*, (e-mail to DRS Counselor and Cc ESS TA)
- ® **ESS-C-181**—*Termination/Re-Placement Report - prior to or on start date of re-placement, update the above form with new job information*; (e-mail to DRS Counselor and Cc ESS TA)
- ® **ESS-C-161**—*Job Analysis* (completed prior to the first (1<sup>st</sup>) day of work) (for re-placement)
- ® **ESS-C-185**—*Job Accommodation Form* (for re-placement)
- ® **ESS-C-229**—*Natural Supports Plan* (for re-placement)

**Legend:** ® = [Required](#)      ® = [required, if applicable](#)

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# IPS Career Profile Milestone Forms List

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## Required Case Documentation for Payment for IPS CP Milestone:

- ® **ESS-C-700**—*IPS Milestone Billing Form*
- ® **ESS-C-705**—*Career Profile*
- ® **ESS-C-710**—*Educational Experience Report (when in training)*

**Legend: ® = Required      ® = required, if applicable**

# IPS 15-Day Job Placement & Retention Milestone Forms List

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## Required Case Documentation for Payment for IPS 15-Day JP & R Milestone:

- ® **ESS-C-185**—*Job Accommodation Form*
- ® **ESS-C-225**—*Record of Hours Worked (or related Contractor Form/Report)*
- ® **ESS-C-700**—*IPS Milestone Billing Form*
- ® **ESS-C-705**—*Career Profile (if updated)*
- ® **ESS-C-710**—*Educational Experience Report (when in training)*
- ® **ESS-C-715**—*Job Search Plan (e-mailed to the DRS Counselor when completed)*
- ® **ESS-C-720**—*Job Start Report*
- ® **ESS-C-725**—*Employer Contact Log(s)*
- ® **ESS-C-730**—*Job Support Plan*
- ® **ESS-C-735**—*Job End Report (if applicable)*

**Legend: ® = Required      ® = required, if applicable**

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# IPS 45-Day Employment Milestone Forms List

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## Required Case Documentation for Payment of IPS 45-Day Employment Milestone:

- [®](#) **ESS-C-225**—*Record of Hours Worked* (or related Contractor Form/Report)
- [®](#) **ESS-C-700**—*IPS Milestone Billing Form*
- [®](#) **ESS-C-705**—*Career Profile* (if updated)
- [®](#) **ESS-C-710**—*Educational Experience Report* (when in training)
- [®](#) **ESS-C-720**—*Job Start Report* (if applicable)
- [®](#) **ESS-C-725**—*Employer Contact Log(s)* (if applicable)
- [®](#) **ESS-C-735**—*Job End Report* (if applicable)

**Legend: [®](#) = Required      [®](#) = required, if applicable**

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# IPS Re-placement Milestone Forms List (one-time only)

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## Required Case Documentation for Payment of IPS Re-placement Milestone:

- ® **ESS-C-185**—*Job Accommodation Form*
- ® **ESS-C-225**—*Record of Hours Worked (or related Contractor Form/Report)*
- ® **ESS-C-700**—*IPS Milestone Billing Form*
- ® **ESS-C-705**—*Career Profile (if updated)*
- ® **ESS-C-710**—*Educational Experience Report (when in training)*
- ® **ESS-C-720**—*Job Start Report (if applicable)*
- ® **ESS-C-725**—*Employer Contact Log(s) (if applicable)*
- ® **ESS-C-735**—*Job End Report (if applicable)*

**Legend: ® = Required**

**® = required, if applicable**

# IPS 90-Day Competitive Employment Milestone Forms List

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## Required Case Documentation for Payment of IPS 90-Day CIE & Retention Milestone:

- ® ESS-C-185**—*Job Accommodation Form (if updated)*
- ® ESS-C-225**—*Record of Hours Worked (or related Contractor Form/Report)*
- ® ESS-C-237n**—*Paystub and/or Earnings Statement*
- ® ESS-C-700**—*IPS Milestone Billing Form*
- ® ESS-C-705**—*Career Profile (if updated)*
- ® ESS-C-710**—*Educational Experience Report (when in training)*
- ® ESS-C-720**—*Job Start Report (if applicable)*
- ® ESS-C-725**—*Employer Contact Log(s) (if applicable)*
- ® ESS-C-730**—*Job Support Plan (if applicable)*
- ® ESS-C-735**—*Job End Report (if applicable)*

**Legend: ® = Required      ® = required, if applicable**

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