##### Discovery Staging Record Cover Sheet

Date:

Counselor:

Provider information:

Jobseeker:

The following cumulative DSR Discovery Staging Record

# is for *Dates of Service* from      to      .

# This time was spent identifying information recorded in *Stage(s)*       .

# Billable Hours

# Authorization Code(s)      Discovery Staging Record

Instructions: This form is used to stage, structure, capture and record the major events of Discovery. The recorder(s) should pay particular attention to how the tasks are typically performed, any accommodations, technology, supports, or specialized training strategies that should be employed. Handwritten discovery notes should be used in the field during the discovery activity with information summarized here. **NOTE: The DSR is a flexible document, changing as situations change. Feel free to update it when needed, but be sure to insert any new/updated information into the form fields WITHOUT overwriting or erasing the original information you entered. That way the DSR will keep a record of the original activities and in chronological order, the newest changes. Here is how to insert: return to the beginning of the section where the new information will be added.  Place the curser above the existing information and type in the new date followed by the newest discovery information. The old information should stay in place. A quality DSR has more verbs than adjectives. It describes the development and observations of activities.**

**Name:**

Date started       Date completed:

**Family Contacts:**

**Phone**         -      ext.       **E-mail:**

**Person(s) completing Discovery Record:**

Additional Contact Information:

**Team Members and Responsibilities:**

**Consultants/Experts to Contact:**

Comments/Considerations:

## Stage One: Home & Neighborhood Observation

*This section includes “relevant” information not only from interviews and conversations but from your observations***.**

***Who will ensure this stage is completed?***      

*By what date?*

Preliminary step: review records, files, assessments to establish current issues, cautions, training, etc., that may be of relevance:

Initial Interviews: Begin with the individual’s home and/or family home (if residing there).

Date:

Recap of Information (attach field notes, pictures):

Observations of home, bedroom, property, belongings that seem relevant:

Specific chores & tasks performed at home:

Hobbies, Sports, Collections, Interests noticed during home visit:

Family/friend/community activities individual engages in and regularity:

Neighborhood Mapping (resources, employers, transportation options, neighbors of interest, activities, civic engagement):

Talents, interests, skills, and tasks observable/revealed:

Activities, situations, & locations that need to be avoided:

## Stage Two: Others to be Interviewed

1. Name:

Relationship/role:

*Person responsible:*        *By this date:*

*Date accomplished*

What was learned?

1. Name:

Relationship/role:

*Person responsible:*        *By this date:*

*Date accomplished*

What was learned?

1. Name:

Relationship/role:

*Person responsible:*        *By this date:*

*Date accomplished*

What was learned?

1. Name:

Relationship/role:

*Person responsible:*        *By this date:*

*Date accomplished*

What was learned?

1. Name:

Relationship/role:

*Person responsible:*        *By this date:*

*Date accomplished*

What was learned?

1. Name:

Relationship/role:

*Person responsible:*        *By this date:*

*Date accomplished*

What was learned?

1. Name:

Relationship/role:

*Person responsible:*        *By this date:*

*Date accomplished*

What was learned?

1. Name:

Relationship/role:

*Person responsible:*        *By this date:*

*Date accomplished*

What was learned?

1. Name:

Relationship/role:

*Person responsible:*        *By this date:*

*Date accomplished*

What was learned?

1. Name:

Relationship/role:

*Person responsible:*        *By this date:*

*Date accomplished*

What was learned?

1. Name:

Relationship/role:

*Person responsible:*        *By this date:*

*Date accomplished*

What was learned?

1. Name:

Relationship/role:

*Person responsible:*        *By this date:*

*Date accomplished*

What was learned?

***Patterns Emerging:*** (Tasks, Interests, Talents & Skills):

### Request Benefits Planning Query (BPQY) from SSA:

Date Requested:

Information Learned:

PASS Potential (or other Work Incentives to investigate):

## Stage Two: Discovery Visits

Identify five places where this individual can be observed in activities that give context to their Interests, Talents & Skills – **TAKE PHOTOS**.



*Person responsible:*        *By this date:*

*Date accomplished*



*Person responsible:*        *By this date:*

*Date accomplished*



*Person responsible:*        *By this date:*

*Date accomplished*



*Person responsible:*        *By this date:*

*Date accomplished*



*Person responsible:*        *By this date:*

*Date accomplished*

### Observations

Note your observations for each location, date, the specific tasks engaged in, and specific supports needed:

1. Location:

Date:

Tasks:

Supports Needed:

1. Location:

Date:

Tasks:

Supports Needed:

1. Location:

Date:

Tasks:

Supports Needed:

1. Location:

Date:

Tasks:

Supports Needed:

1. Location:

Date:

Tasks:

Supports Needed:

1. Location:

Date:

Tasks:

Supports Needed:

1. Location:

Date:

Tasks:

Supports Needed:

1. Location:

Date:

Tasks:

Supports Needed:

1. Location:

Date:

Tasks:

Supports Needed:

1. Location:

Date:

Tasks:

Supports Needed:

Summary of supports needed during these activities (be specific):

What environments & activities need to be avoided and why?

What places, skills and activities need more exploration?

Where/when will this exploration occur?

Who is responsible?

Report on follow-up exploration (Report each follow up activity with the date and descriptive narrative. Include what was learned, who participated, and the name of the person responsible for the activity):

## Stage Three: Vocational Themes

(not job descriptions or business ideas)

### Emerging themes that meld Tasks, Interests, Talents, and Skills:



### Identify 3 places for each theme where people with similar themes work:

Theme 1:



Theme 2:



Theme 3:



### Select 2 places and arrange informational interviews.



*Person responsible:*        *By this date:*

*Date accomplished*



*Person responsible:*        *By this date:*

*Date accomplished*

Interview dates and notes:



Which themes seem strongest?

New interests/talents revealed?

**Arrange further informational interviews and/or short (up to ½ a day) work experiences at the following places:**

1. Location:

*Person responsible:*        *By this date:*

*Date accomplished*

*Observations:*

1. Location:

*Person responsible:*        *By this date:*

*Date accomplished*

*Observations:*

1. Location:

*Person responsible:*        *By this date:*

*Date accomplished*

*Observations:*

1. Location:

*Person responsible:*        *By this date:*

*Date accomplished*

*Observations:*

1. Location:

*Person responsible:*        *By this date:*

*Date accomplished*

*Observations:*

1. Location:

*Person responsible:*        *By this date:*

*Date accomplished*

*Observations:*

1. Location:

*Person responsible:*        *By this date:*

*Date accomplished*

*Observations:*

## Stage Three: Vocational Profile

Summarize findings from Discovery and include the following in your description.

1. Interests, Talents, Skills, Tasks as observed; best ecological fit; best learning mode/methodology; places/situations to avoid; personal resources (benefits, family support, savings, transportation); most endearing/engaging qualities; exploitable skills:
2. Ideal Conditions of Employment::
3. What “off the job” support will be needed and who will provide?
4. How will this person stay in contact with their friends, and who will ensure this?
5. How will this person get to and from work?
6. What is this person’s ideal work schedule (days and hours) and why?

## Stage Four: Job/Business Development Plan

List of Twenty Places where people with similar Vocational Themes Work:

|  |  |  |
| --- | --- | --- |
| Theme 1: | Theme 2: | Theme 3: |

**Note:** Create representational portfolios, picture books, resumes, and other tools for job development as needed.

**Person responsible:**

By what date:       Date completed:

**Describe the job development tool (attach or submit with this DSR):**

## Stage Four: Informational Interview

Utilizing information gained during Discovery and summarized in this DSR, select 3 or 4 businesses from the list above and arrange Informational Interviews for job development

1. **Business Name:**

Person responsible:

By this Date:       Date completed:

**Contact person and title:**

Phone:        -     ext.       e-mail:

Notes:

Information Learned:

Follow up (what, who and by when):

Negotiation Notes: Date:       Notes:

1. **Business Name:**

Person responsible:

By this Date:       Date Completed:

**Contact person and title:**

Phone:        -     ext.       e-mail:

Notes:

Information Learned:

Follow up (what, who and by when):

Negotiation Notes: Date:       Notes:

1. **Business Name:**

Person responsible:

By this Date:       Date Completed:

**Contact person and title:**

Phone:        -     ext.       e-mail:

Notes:

Information Learned:

Follow up (what, who and by when):

Negotiation Notes: Date:       Notes:

1. **Business Name:**

Person responsible:

By this Date:       Date Completed:

**Contact person and title:**

Phone:        -     ext.       e-mail:

Notes:

Information Learned:

Follow up (what, who and by when):

Negotiation Notes: Date:       Notes:

1. **Business Name:**

Person responsible:

By this Date:       Date Completed:

**Contact person and title:**

Phone:        -     ext.       e-mail:

Notes:

Information Learned:

Follow up (what, who and by when):

Negotiation Notes: Date:       Notes:

1. **Business Name:**

Person responsible:

By this Date:       Date Completed:

**Contact person and title:**

Phone:        -     ext.       e-mail:

Notes:

Information Learned:

Follow up (what, who and by when):

Negotiation Notes: Date:       Notes:

1. **Business Name:**

Person responsible:

By this Date:       Date Completed:

**Contact person and title:**

Phone:        -     ext.       e-mail:

Notes:

Information Learned:

Follow up (what, who and by when):

Negotiation Notes: Date:       Notes:

## DSR Final Approvals

NOTE: From this point forward you will continue to use the format described in Stage 4 to report all job development activities for wage employment. For self-employment or business-within-a-business you will report through narrative case notes, submission of a business plan, and any negotiations for documenting job development.

DSR Final Approvals Signatures in this section are done when the jobseeker and others decide this DSR answers the question “Who is this person?”, and all Team members agree to the direction of the plan.

Participant Signature: Date:

Conservator/Care Provider Signature: Date:

Vocational Specialist Signature: Date:

Voc Manager Signature: Date: