

Individual Placement and Support – Supported Employment

PROVIDER GUIDE

Understanding IPS-SE in North Carolina

Effective November 2026

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Version 1.0

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INTRODUCTION AND BACKGROUND

Employment is a key social determinant of health and well-being for working-age adults, including those with mental health or substance use disorders. However, even though many people with these conditions can and want to work, they may struggle to find or keep employment. Individuals with the most serious conditions typically remain jobless over their lifetime. Unemployment can lead to negative outcomes, such as social isolation, inactivity, depression, and increased thoughts of suicide.

The good news is that research shows people with mental health or substance use disorders can achieve Competitive Integrated Employment (CIE) in jobs they choose, especially when they are able to access appropriate support through Individual Placement and Support – Supported Employment (IPS-SE).

What is IPS-SE?

IPS-SE is a clearly defined, evidence-based practice that helps individuals with serious mental health and/or substance use disorders (as a primary diagnosis) find and maintain competitive employment and/or further their education to achieve their career goals. Mental health and substance use disorders are also referred to as behavioral health disorders.

IPS-SE is a person-centered behavioral health service with a strong focus on employment and/or education. It is for individuals age 16 and older with significant mental health or substance use challenges, particularly those for whom employment has been difficult, interrupted, or inconsistent.

How IPS-SE Works

IPS-SE helps individuals choose, obtain, and maintain competitive, community-based paid employment, including:

- Part-time or full-time jobs
- Self-employment
- Career advancement through education or training

Trained professionals and Peer Mentors provide these services. They work collaboratively with IPS-SE participants to support their vocational goals, promote community integration, and ensure employment success.

Staffing

The IPS-SE team consists of multiple professionals. The requirements and duties for each role are listed in NC Medicaid Clinical Coverage Policy (CCP) 8H-2, 1915(i) IPS for Mental Health and Substance Use, published by the North Carolina Department of Health and Human Services (NCDHHS). IPS-SE teams include the following positions:

- Team Lead
- Employment Support Professional (ESP)
- Employment Peer Mentor (EPM)
- Benefits Counselor
- Program Assistant

Components of IPS-SE

Evidence-Based Fidelity Model

IPS-SE is built on a fidelity scale developed by the Dartmouth Psychiatric Research Center and promoted by the U.S. Substance Abuse and Mental Health Services Administration (SAMHSA). It is important for all providers to adhere to the fidelity model to ensure the service is effective.

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Zero-Exclusion Criteria

IPS-SE does not require pre-vocational or job readiness evaluation/training. No one is excluded based on readiness factors, including:

- Active substance use
- Mental health symptoms
- Criminal background
- Non-adherence to treatment or medication
- Appearance or hygiene

Individualized, Community-Based Services

IPS-SE services are tailored to the participant's needs and delivered as often as necessary (daily, weekly, or monthly). Services are not group-based and must occur primarily in the community—with staff expected to spend at least 65% of their time outside of the office.

Why Employment Matters!

BENEFITS of Employment

- Provides a critical component of recovery
- Enhances self-esteem and quality of life
- Increases independence and self-sufficiency
- Reduces hospitalization and criminal justice involvement
- Provides income, structure, and purpose

RISKS of Unemployment

- Increased substance use
- Worsened psychiatric symptoms
- Lowered self-worth
- Feelings of isolation and alienation

Career Profile

Staff work with each participant to develop and update a career profile, which captures the person's interests, skills, barriers, and job preferences. The career profile guides job development and support planning. It is completed during multiple sessions and is a living document. It should be updated as needed when changes occur, such as when the participant obtains employment or updates their disclosure preferences.

Collaboration and Coordination

IPS-SE teams work closely with:

- Behavioral health providers
- Employers
- The North Carolina Division of Employment and Independence for People with Disabilities (EIPD) *(formerly known as the Division of Vocational Rehabilitation Services)*
- The individual's care team (with consent)

Rapid Job Search

IPS-SE focuses on quickly helping individuals find jobs that match their interests and abilities.

How Effective is IPS-SE?

Individuals who engage in IPS-SE are **three times** more likely to obtain employment compared to those participating in traditional vocational services.

Disclosure is Always Optional

The level of involvement with employers is based on the individual's preferences, especially when it concerns disclosure of their mental health or substance use condition.

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IPS-SE IN NORTH CAROLINA

Transitions to Community Living Overview

On Aug. 23, 2012, the state of North Carolina entered into a Settlement Agreement with the U.S. Department of Justice (DOJ) concerning community integration of individuals with serious mental illness (SMI) or severe and persistent mental illness (SPMI) who reside in—or who are at risk of entry into—an Adult Care Home.

As outlined in the DOJ Settlement Agreement, North Carolina agreed to:

- Develop and implement effective measures to prevent inappropriate institutionalization; and
- Provide adequate and appropriate public services and support, identified through person-centered planning, in the most integrated setting appropriate to meet the needs of individuals with SMI or SPMI.

In response, North Carolina created the Transitions to Community Living (TCL) program. TCL provides eligible adults living with serious mental illnesses the opportunity to choose where they live, work, and engage in their communities. The program promotes recovery by providing long-term housing, community-based services, Supported Employment services, and opportunities for community integration.

Statewide Support for Employment First

On March 28, 2019, Gov. Roy Cooper signed Executive Order No. 92, reinforcing North Carolina's commitment to the "Employment First" initiative—prioritizing competitive, integrated employment as the preferred outcome for individuals with disabilities.

Implementation of IPS-SE

Feedback from community meetings and trainings indicates the focus on employment and the "Employment First" philosophy represents a major shift in thinking for North Carolina's system of care. There is a clear need for hands-on, systematic training and mentorship to fully understand the model and to support changes in provider organization practices. Additionally, there is a need for a stronger focus on removing barriers—such as "readiness thinking"—through ongoing stakeholder education. Improving Benefits Counseling for individuals and their families, as well as enhancing job development using the dual-customer approach with employers, is also essential.

Furthermore, the North Carolina Division of Mental Health, Developmental Disabilities, and Substance Use Services (DMHDDSUS) has been working closely with EIPD to support this initiative and has secured a grant from Dartmouth College to provide technical assistance (TA) and support implementation efforts.

UNC Institute for Best Practices

The University of North Carolina (UNC) Institute for Best Practices is the NCDHHS-approved TA vendor for IPS-SE services. The institute is composed of experienced professionals who are trained in IPS fidelity and the IPS-SE model. The UNC IPS-SE Consultant and Trainer Team support IPS-SE teams across the state. Each team is assigned a dedicated trainer to assist with implementation and ongoing support.

Per the NC Medicaid CCP, the institute is responsible for providing TA as required for those teams with fair fidelity, ensuring fidelity to the IPS model and conducting fidelity reviews in collaboration with other trained professionals. The institute also offers a "Monthly Round Up" email newsletter with upcoming trainings, updates, resources, and relevant information for IPS-SE providers. Sign up to get the newsletter. If your team needs consultation, you can submit a request

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through the institute's website.

Provider Resources

IPS-SE providers must regularly reference and utilize tools provided by the model developers:

- IPS Employment Center
- UNC Institute for Best Practices
- SAMHSA IPS Toolkit
- NC Medicaid CCP 8H-2, 1915(i) IPS for Mental Health and Substance Use
- State-funded IPS Service Definition
- NC Medicaid Program Specific Clinical Coverage Policies
- State-funded Service Definitions

Eight Practice Principles of IPS-SE

The Fidelity Model for IPS-SE incorporates eight practice principles that all service providers must follow to ensure high-quality, evidence-based Supported Employment services.

1. **Competitive employment**: Jobs must be open to anyone and offer at least minimum wage, with pay that is comparable to co-workers performing similar duties. Workers must pay taxes on their income, whether they are employees or independent contractors.
2. **Zero exclusion:** Individuals are never excluded from IPS-SE based on factors like the ones below. Everyone is eligible to participate in IPS-SE, regardless of these challenges:
    a. Readiness (such as active mental health symptoms)
    b. Diagnosis (including psychiatric disorders; within the range of the CCP)
    c. Substance use activity/history
    d. Psychiatric hospitalizations
    e. Homelessness
    f. Level of disability
    g. Legal system involvement
3. **Integrated services:** Employment Specialists are integrated with behavioral health treatment teams, ensuring vocational and behavioral health needs are addressed together. Specialists are typically assigned to one or two treatment teams and discuss their caseloads regularly.
4. **Attention to preferences:** IPS-SE services are person-centered and tailored to the individual's preferences and choices, not dictated by the Employment Specialist's or supervisor's judgment. The participant's career goals, interests, and values guide the employment process, ensuring they are supported in a meaningful and personal way.
5. **Benefits planning:** Employment Specialists provide participants with clear, personalized information about government benefits, including Social Security, Medicaid, and other relevant entitlement programs. This ensures job seekers can make informed decisions about work without fear of losing necessary benefits.
6. **Rapid job search:** IPS-SE uses a rapid job search approach, aiming to help job seekers obtain employment as quickly as possible, rather than focusing on long assessments, training, or counseling. First employer contact should happen within 30 days of initiating the job search.
7. **Systematic job development:** Employment Specialists actively visit employers based on the job seeker's preferences to understand their business needs and hiring criteria. This allows the development of targeted job opportunities.
8. **Time-unlimited services:** Job support continues if the individual wants and/or needs help. Employment Specialists must maintain face-to-face contact to provide continued support identified on the Job Support Plan in the career profile, ensuring long-term success and job stability.

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IPS-SE Fidelity in North Carolina

Since the introduction of the new IPS-SE service definition in May 2013, NCDHHS and Local Management Entities/ Managed Care Organizations (LMEs/MCOs), which operate Behavioral Health and Intellectual/Developmental Disability Tailored Plans, have collaborated to identify providers through network enrollment and start-up activities, ensuring adherence to fidelity standards.

As of July 1, 2013, North Carolina began conducting fidelity evaluations for new providers using the IPS-SE Fidelity Scale. This scale, developed by the Dartmouth Psychiatric Research Center, is included in the SAMHSA IPS Toolkit. The IPS-SE Fidelity Scale serves as both an evaluation tool and a guide to help IPS-SE teams achieve better outcomes.

Self-assessment and Fidelity

IPS-SE teams can use the IPS-SE Fidelity Scale to self-assess their service. Conducting a self-assessment is a useful starting point to identify areas in need of improvement before the next review. Even if the score is in the "good" to "exemplary" range, we advise working with the assigned trainer providing TA through UNC to help confirm the accuracy of the self-assessment. A fidelity review is essential for assessing the effectiveness of your organization's IPS-SE service delivery. TA can include coaching, observation, consultation, and training for IPS-SE teams.

The IPS-SE Fidelity Scale translates eight practice principles into 25 specific items on which IPS-SE is scored during the fidelity review. A higher score indicates better service quality and higher expected job outcomes for IPS-SE participants. Regular self-assessment and review of action plans are effective methods for continuously improving IPS-SE services. Upon request, the UNC trainer will verify service delivery scoring according to the IPS-SE Fidelity Scale.

Dual Purpose of IPS-SE Fidelity Review

The IPS-SE Fidelity Review serves two main purposes:

1. Ensuring teams are operating at a basic level of fidelity (a final rating of 74+ on the scale)
2. Providing targeted, individualized quality improvement guidance and support to teams

IPS-SE fidelity reviewers are highly trained professionals with experience in employment services and evaluation, ensuring high reliability and validity in ratings and TA reports. Reviewers conduct the review over two days and gather data from observations, documentation, and interviews.

Fidelity Review Process

Notification and Preparation

The UNC trainer will notify the Team Lead six to eight weeks prior to the review week, allowing them to select two days of the week for the onsite visit. During the visit, reviewers monitor services through observations and interviews.

Two weeks before the onsite visit, the IPS-SE team provides documentation for the IPS-SE participants randomly selected by UNC. The selection will include at least 12 charts for review. If the team's caseload exceeds 50 individuals, the selection is 20% of the caseload. The review will include documentation for at least two individuals who were discharged due to engagement. Selected active participants are categorized as follows:

- TCL participants (included, but not a specific percentage)
- Job search participants (40%)
- Follow-along support participants (60%)

The IPS-SE team submits required documentation for selected participants to the fidelity team within three business days of notification.

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Documentation to Submit Prior to Onsite Review

- Fidelity spreadsheet
- Agenda for onsite review
- Documentation for selected IPS-SE participants
- Weekly vocational unit meeting minutes (including all IPS-SE staff to review caseloads and share progress, successes, needs, job leads, and other issues)
- Behavioral health team meeting minutes
- EIPD meeting minutes
- Steering committee meeting minutes
- Supervision and field mentoring notes
- Quality assurance reports (including IPS-SE Fidelity Scale self-assessments and fidelity action plans)
- CEO communication regarding employment rates and goals or other communication with the Team Lead
- Back-to-work (success) stories
- Blank Comprehensive Clinical Assessment/mental health agency assessment and referral forms

Onsite Tasks

Interviews

- Clinicians
- Psychiatrists
- All IPS-SE team members (Team Lead, ESP, EPM, Benefits Counselor)
- EIPD counselors
- Individuals served
- Natural support(s) of individuals served (natural supports do not have to be connected to the person being interviewed)
- Provider organization leadership (if there are multiple teams within the organization, interviews may occur yearly)

Observations

- Vocational unit meeting
- Behavioral health team meeting(s)
- Job development with ESPs and Team Lead (if there are not two ESPs) This includes two observations: employer first time meeting and employer with an ongoing relationship

IPS-SE Fidelity Tool Total Rating and Subsequent Fidelity Evaluation Timeframe		
Certification	**Score Range**	**Minimum Follow-up Timeframe**
Fair Fidelity Level	Rating 74-99	Six months after final report is received
Good Fidelity Level	Rating 100-114	12 months after final report is received
Exemplary Fidelity Level	Rating 115-125	18 months after final report is received

Training Requirements for IPS-SE Staff

To ensure high-quality service delivery and compliance with Medicaid standards, staff must complete training as outlined in the current IPS CCP. It is essential to review this policy regularly to verify appropriate personnel complete training within designated time limits.

Required Trainings

All IPS-SE team members must complete the following trainings:

- IPS-SE 101

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- Person-centered Employment Planning
- Supervising NC Certified Peer Support Specialist (Team Lead Only)
- Employment Peer Mentoring (EPM only)
- Motivational Interviewing
- Ongoing continuing education units (CEUs) related to the population being served

Note: Staff must complete these training courses within the time limits specified in the IPS-SE CCP.

Optional/Recommended Trainings

While not required, Vaya Partners highly recommends training offered by UNC to support staff development. These are excellent opportunities to expand skills and stay updated on IPS-SE best practices, and trainings may count toward the annual CEU requirement.

EIPD

IPS-SE providers must be contracted with EIPD and refer individuals to EIPD for an eligibility determination at service initiation. EIPD must collaborate with IPS-SE teams and refer individuals to Tailored Care Management and/or IPS-SE teams for IPS-SE service initiation. During monthly meetings, the IPS-SE team and EIPD staff discuss referrals and service coordination. If EIPD is unable to provide services, Vaya Partners will staff the case with the IPS-SE team and/or EIPD. The IPS-SE provider must maintain documentation of the denial and the reason for denial.

IPS Milestone Flow



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TAILORED CARE MANAGEMENT AND IPS-SE

Tailored Care Management (TCM) is a whole-person care management program available to eligible NC Medicaid members at no cost to them. It helps individuals meet their health and wellness goals through comprehensive coordination of physical health, behavioral health, and social support services.

Conflict-free Care Management

North Carolina has implemented conflict-free care management to ensure unbiased service delivery. Under this model, the organization providing the assessment and coordination of services must be separate from the IPS-SE service provider. This separation reduces potential bias and ensures the participant's needs and choices are the primary drivers of service decisions.

1915(i) Assessment Process (Medicaid Only)

The process to determine a Medicaid member's care management assignment and complete the 1915(i) assessment entails the following steps:

- **Verify TCM assignment:** If you receive a referral and are unsure if 1915(i) assessment is completed, check NCTracks to identify which organization is providing the member with TCM (located under Copay information). If there is a TCM provider listed, reach out to the agency directly through the number provided or look up on the Vaya Partners TCM Providers list for contact information, including email addresses.
- **Initiate referral (if Medicaid is listed as Vaya Partners or not listed in NCTracks):** The IPS-SE team member should email 1915i@VayaPartners.org to request a 1915(i) assessment for IPS-SE services. Include the name, date of birth, current address, and contact number of the individual needing the assessment (in case the demographic information in the Vaya Partners system is incorrect). If the individual participates in TCL, be sure to copy Vaya Partners' Supported Employment Specialist on the email.
- **Assessment Completion:** The assigned Care Manager completes the 1915(i) assessment either in person or via telehealth (using video and audio).
- **Assessment Review:** The provider completed assessment is sent to Carelon, the organization designated by NCDHHS to determine 1915(i) eligibility.
- **Care Plan Development:** Upon approval of 1915(i) eligibility, the Care Manager develops the care plan and obtains required signatures from:
    - The member and/or guardian
    - The IPS-SE team representative Qualified Professional (QP)
    - Other service providers
    - Natural supports (if participating in the meeting)
- **Service Initiation:** Once all signatures are obtained, IPS-SE services can begin. The Care Manager sends the care plan to the IPS-SE team as part of a care plan packet, which the provider should file in the medical record as the official Service Order.

TCM Requirements for IPS-SE (Individual)

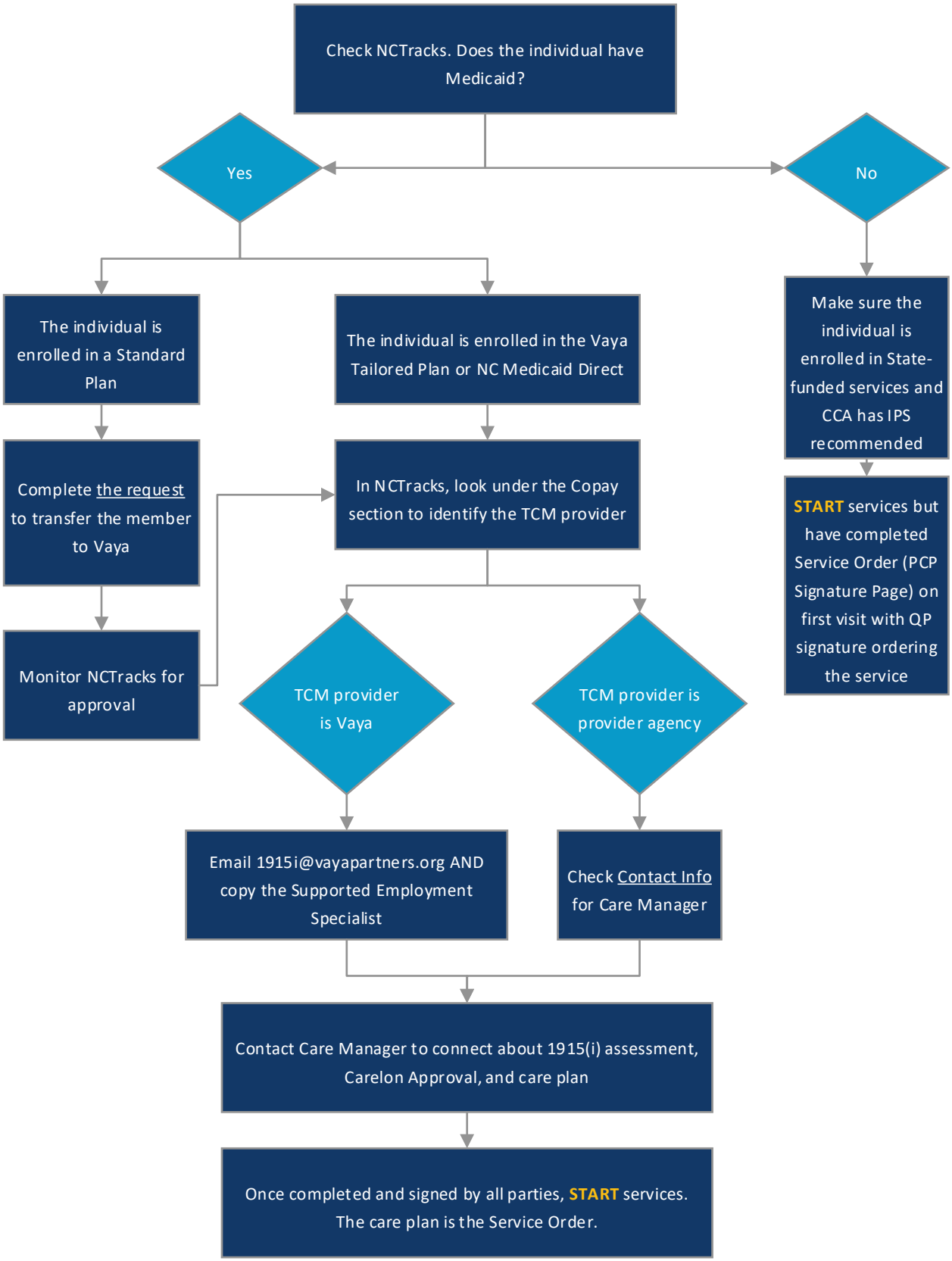
As part of Medicaid requirements, all IPS-SE participants must:

- Receive a 1915(i) assessment
- Have routine monitoring by their assigned Care Manager throughout their participation in IPS-SE services
- Have a care plan developed and maintained by the Care Manager:
    - The care plan must be signed by both the member (guardian) and a QP from the IPS-SE provider.
    - This care plan also functions as the Service Order.

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IPS Referral Workflow

To complete the request to transfer the member to Vaya Partners, visit the NC Medicaid website. For Care Manager contact information, review the TCM Providers list.



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Monthly IPS-SE Collaborative Meeting

Vaya Partners hosts a monthly meeting via Microsoft Teams to support IPS-SE Team Leads, provider organization leadership, and other designated staff members. Meeting highlights include:

- Information-sharing through presentations
- Updates from Vaya Partners, EIPD, UNC Institute for Best Practices, and NCDHHS
- Discussion of program expectations
- Opportunity for Q&A and problem-solving
- Sharing of best practices and resources

If you have topics and/or questions to be addressed during the meeting, email the Vaya Partners TCL Supported Employment Specialist in advance. If a provider staff member is not receiving the meeting invitation, notify the TCL Supported Employment Specialist to add them to the distribution list.

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NC CORE MODEL

Outcome-Based (Milestone) Payment System for IPS-SE Services

North Carolina has adopted the NC CORE Model, an outcome-based (milestone) payment system, for IPS-SE services. There are nine core milestones, although several of these include multiple payment segments.

IPS-SE Milestone Reference Guide

Milestone	Purpose / Key Activities	Required Documentation	Payment Provided and Outcome Complete
1. Career/ Educational Exploration and Initial Career Profile **(Vaya Partners payment)**	• Discuss interests in work/education • Provide IPS info/resources • Begin career profile (initial draft) • Hold face-to-face meetings	Career profile with the following information thoroughly completed: • Work history • Health history • Disclosure preferences • Job search plan • Employment goal • Job support plan • Input from EIPD, behavioral health providers, or natural supports (if available)	Career profile (initial) Paid by Vaya Partners

2. Career Profile Completion **(Vaya Partners payment)**	• Complete first full career profile (living document to be updated as needed)
	• Expand on previous sections input from others
	• Develop detailed job search plan
	• Develop detailed job support plan with tasks and responsibilities for individual/IPS-SE team members by answering:
	  ○ Who is providing the support?
	  ○ Where is the support occurring?
	  ○ How often is support being provided?
		Full career profile, including:
		• Personal preferences
		• Daily activities
		• Work interests/skills
		• Benefits
		• Education experience and preparation
		• Military experience
		• Vocational recovery and independence plan
		• Pre-employment screening
		• Additional info
		• Detailed job search and support plans
		• Input from EIPD, behavioral health providers, or natural supports (if available)
			Career profile (final)
			
			Paid by Vaya Partners

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Milestone	Purpose / Key Activities	Required Documentation	Payment Provided and Outcome Complete
IPS Job Retention ***(EIPD ONLY) – EIPD payment)***	If the participant secures a job before the EIPD Individualized Plan for Employment (IPE) is developed, the provider can bill EIPD for "IPS-SE Job Retention," which will lead directly to job support and vocational recovery	• Job support plan • Job start form that is dated prior to the development of the IPE	Paid once through EIPD only
3a. IPS Job Search **(EIPD payment)**	Complete one of the following items, whichever occurs first: • Development and refining of job search tools, including interviewing instruction, resume development, disclosure discussion, employment, and recovery conversations • Submission of 15 applications • Job obtained (if fewer than 15 applications submissions)	• Progress notes showing evidence of job search activities or development of tools to aid in the job search • Job search log showing evidence of application submissions, including date of application, employer, position, method of submission, and follow-up details • Job search plan from career profile • Job start and support plan (once employed)	**Can be submitted multiple times, but if more than twice, must consult with Program Specialist for behavioral health for consideration of continued job search efforts** Paid by EIPD unless individual declines EIPD involvement and is staffed and funded through Vaya Partners
3b. IPS Employer Networking **(EIPD payment)**	Job development, including follow-ups and networking: • Milestone can be earned when 12 face-to-face contacts with hiring personnel are complete, with priority given to the IPE/career profile goal***, or*** • Employment has been obtained, and there is documented face-to-face employer contact with hiring personnel regardless of the number of face-to-face contacts	• Evidence of a minimum of 12 face-to-face meetings with employers with priority of IPE and career profile vocational goal • Job search plan in the career profile • Employer contact log that includes date of contact, employer, employer point of contact, employer email/phone number, address, purpose of contact, and outcome/result of contact	**Can be submitted multiple times, but if more than twice, must consult with Program Specialist for behavioral health for consideration of continued employer networking efforts** Paid by EIPD unless the individual declines EIPD involvement and is staffed and funded through Vaya Partners

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Milestone	Purpose / Key Activities	Required Documentation	Payment Provided and Outcome Complete
3c. Job Development with Retention (includes a variety of individualized, employment-focused services designed to prepare the individual for competitive employment) **(EIPD payment)**	• Benefits Counseling for those receiving state/ federal benefits • Transportation planning • Job readiness support • Pros/cons of disclosing mental health condition to employer with documented plan for who/how/when disclosure is handled • Follow-along supports determined with details in job support plan	3C Job Placement: progress notes showing three face-to-face member contacts across three separate working days on or after first day of employment with interventions; interventions should reflect job supports identified in the career profile and support job retention; do not have to be consecutive days	Paid by EIPD unless individual declines EIPD involvement and is staffed and funded through Vaya Partners **Multiple payments can occur depending on the number of jobs obtained before EIPD closure**
4. Job Support and Vocational Recovery Involves weekly job support services to ensure the individual maintains employment and to proactively address any concerns; issues that may have previously led to job loss should be addressed to prevent recurrence **(EIPD payment)**	• Weekly intensive supports to maintain employment • Addressing of issues preventing job loss • Advocating for individual with employer (if disclosure agreed) • Collaboration with EIPD counselor • Interventions following the job support identified in the job support plan (onsite or offsite given the individual's preference) • Minimum of 30 days but depends on level of support needed	Progress notes or summaries documenting interventions and job support retention; documentation noting discussion with the EIPD counselor, individual and IPS-SE staff on vocational recovery date	Paid by EIPD unless individual declines EIPD involvement and is staffed and funded through Vaya Partners
5. Successful EIPD Closure (90 days post-vocational recovery) **(EIPD payment)**	• Continued support at 30, 60, 90 days • Less intensive support • Ensuring ongoing stability, job maintenance, and independence • Support for any new issues that have been reported to ensure job retention	Monthly summaries or notes showing: • Two or more face-to-face contacts per month • Updates on job satisfaction/issues • 30 days after the outcome date from previous milestone	**5a: +30 days** **5b: +60 days** **5c: +90 days** **Paid every 30 days** Payment is provided through EIPD unless declined, in which case it is staffed with Vaya Partners

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Milestone	Purpose / Key Activities	Required Documentation	Payment Provided and Outcome Complete
6. Long-term Follow-along **(Vaya Partners payment)**	• Maintain current job through strategies/support • Explore advancement or new opportunities • Continue career planning based on preference/goals • Collaborate with individuals to ensure tools, resources, and support needed to remain successful in role or transition to new opportunities	Progress notes documenting face-to-face support and strategies used	Ongoing follow-along contact completed. Paid by Vaya Partners
7. Vocational advancement Supports recognition of the individual's career growth and ensures they continue to make informed decisions about their employment and benefits **(Vaya Partners payment)**	Promotion or pay increase	Documentation of the promotion or wage increase: • Effective date • New job title (if applicable) • New compensation • Referral to Benefits Counselor if receiving Supplemental Security Income (SSI)/ Social Security Disability Insurance (SSDI)/ Medicaid, etc., to understand how increased earnings may impact their benefits	Verification of promotion/wage increase Paid by Vaya Partners
8. Educational advancement Supports the individual's progress toward employment goals through educational achievement (note: this milestone has a limited payment option and may only be billed once per completed program or term as defined by funding guidelines) **(Vaya Partners payment)**	Completion of educational program, semester, or certificate	Documentation of: • Institution/program name • Completion date • Outcome (credits, certificate, etc.)	Verified completion of educational term/ program Paid by Vaya Partners

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Milestone	Purpose / Key Activities	Required Documentation	Payment Provided and Outcome Complete
9. Successful IPS-SE closure Marks the formal conclusion of IPS-SE involvement and celebrates the individual's progress toward sustainable employment and independence **(Vaya Partners payment)**	• Employment goals met • Job stability and satisfaction • Natural supports/resources in place for employment success after graduation • Readiness for independence confirmed	Final documentation, including: • Summary of services received and outcomes achieved • Progress toward vocational recovery/independence • Closure summary	Formal transition out of IPS-SE Paid by Vaya Partners

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DOCUMENTATION AND REPORTING

Documentation Requirements in the Service Record

IPS-SE providers must maintain accurate and complete documentation for every individual receiving services. The following items are required in the clinical/service record:

- **Comprehensive Clinical Assessment (State-funded services recipients only)**: A completed and current assessment is required to justify service needs.
- **Service Order:** Medicaid members require a signed care plan, provided as part of the care plan packet, which serves as the Service Order. State-funded services recipients need a signed Service Order on the first day of services, signed by both the individual and a QP or higher.
- **Care Plan/Person-centered Plan:** This plan is required if the individual is receiving other enhanced services. The employment plan should be integrated and updated accordingly.
- **Career Profile:** The career profile is a living document developed collaboratively with the individual and must be updated regularly.
- **Service Notes:** Notes must align with the standards outlined in the DMHDDSUS Records Management and Documentation Manual (APSM 45-2), including documentation of:
    - Goal-related services
    - Progress and challenges
    - Interventions used
    - Outcomes of service provided
- **Discharge Planning Documentation:** Evidence that discharge planning has been discussed with the individual should be present in the record, even if discharge is not imminent.

IPS-SE teams must complete and submit documentation on a set schedule. Below is a summary of key reports, links, and submission guidelines:

Document Name	Submission Link	Submitted To	Frequency / Due Date
• **In At-Risk Checklist** • **TCL IPS-SE Referral Denials and Discharges**	• In At-Risk Checklist • TCL IPS-SE Referral Denials and Discharges	Vaya Partners	**Monthly** – Due by the **5th of each month**
IPS-SE Outcomes Report	IPS-SE Outcomes Form	DMHDDSUS	**Quarterly** – due in **January, April, July, and October** by the **10th of the month**
TCL Capacity Report	TCL Capacity Report	Vaya Partners	**Quarterly** – due in **January, April, July, and October** by the **5th of the month**

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