

GUIDELINES ON SERVICES PROVIDED BY JOB COACHES

SET III

**TOOLKIT FOR MONITORING AND MANAGEMENT
OF JOB COACH PERFORMANCE**



POLSKIE FORUM OSÓB NIEPEŁNOSPRAWNYCH

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**TOOLKIT FOR MONITORING AND MANAGEMENT
OF JOB COACH PERFORMANCE**

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TABLE OF CONTENTS

CHAPTER I

MONITORING OF JOB COACH PERFORMANCE

- GENERAL FRAMEWORK 7

CHAPTER II

DATA RECORDING WITHIN THE MONITORING SYSTEM 13

1. CLIENT DATA IN THE SUPPORTED EMPLOYMENT PROCESS 13

2. DATA ON TECHNICAL EXPERTS, INCLUDING JOB COACHES,
VOCATIONAL COUNSELLORS, PSYCHOLOGISTS AND OTHER
MEMBERS OF INTERDISCIPLINARY SUPPORT TEAMS 15

3. DATA ON AN EMPLOYER – PARTY TO A SIGNED AGREEMENT
ON COOPERATION WITHIN SUPPORTED EMPLOYMENT SERVICES 16

4. DATA ON ACTIVITIES PERFORMED BY TECHNICAL EXPERTS 16

5. TOOLS SUPPORTING PERFORMANCE AND MONITORING
OF JOB COACH PERFORMANCE 18

CHAPTER III

MANAGEMENT OF JOB COACH PERFORMANCE

– SUPPORTED EMPLOYMENT IMPLEMENTATION PROCEDURE 20

1. DOCUMENTATION REQUIRED DURING SERVICE IMPLEMENTATION 20

2. FUNDAMENTAL TYPES OF SUPPORT PROVIDED BY JOB COACHES	23
3. CLIENT ENGAGEMENT IN SUPPORTED EMPLOYMENT SERVICE	23
4. TERMINATION OF CLIENT ENGAGEMENT IN SUPPORTED EMPLOYMENT	24
5. WORK STRUCTURE AND PERFORMANCE INDICATORS FOR JOB COACHES	25
6. MANAGEMENT AND MONITORING OF JOB COACH PERFORMANCE	
– SYSTEMIC RECOMMENDATIONS	26
APPENDICES	28

CHAPTER I

MONITORING OF JOB COACH PERFORMANCE

– GENERAL FRAMEWORK

Monitoring of a job coach's performance is defined as a process of consistent collecting and analysing of both quantitative and qualitative data to evaluate actions taken by job coaches.

Designed to collect and analyse such information, an online application called Electronic Monitoring System (hereinafter referred to as the monitoring system) is available together with a set of forms describing a job coach's activities.

The monitoring system was set up to enhance and automate the process of collection and analysis of data on support provided by job coaches to clients. It is geared towards the maximum simplification of the process of the documentation of a job coach's performance, the reduction of formal procedural requirements and focuses on the model's primary application i.e. client-oriented support (support for persons with disabilities).

The monitoring system registers all activities in which a client participates (direct support) and which are conducted on his/her behalf but without his/her involvement (indirect support). Other job coach activities are also registered, should they prove to be relevant to the supported employment model. The system enables users to register stages of a vocational development process, including potential progress or lack of progress. A unified catalogue of activity names has been developed to support analysis and reporting in the system.

Multifaceted data analysis, an important factor in the management of job coach performance, can be conducted by using functional reports based on specific "key questions". The answers to them are provided by means of thoroughly planned data monitoring.

One of the Electronic Monitoring System's key components is a tool for registering provided support use forms (so-called work record sheets) which must be completed on an ongoing basis. The tool is launched simply, by selecting specific items on a drop-down list. There is no need to enter any content (except for group support and the option "other" which is subject to a coordinator's approval; once the approval has been granted, the option becomes available on the drop-down list). A time unit, understood as an hour of a job coach's work, is subject to detailed specification. This tool gives a good picture of a day's work to both a job coach and his/her manager. Such detailed monitoring enables supported employment researchers to obtain quantified input for comprehensive analyses which help identify factors that guarantee effective services (both in terms of client satisfaction and financial efficiency, which is crucial for the financing institution).

The catalogue of data subject to monitoring and principal reporting functionalities includes the following items:

1. Key characteristics of a person with a disability – the service’s client. The database of clients of supported employment services is based, inter alia, on application forms which are stored in paper version only. The database contains data which is compartmentalised in the following files:
 - a) personal file,
 - b) participation file,
 - c) hands-on action file,
 - d) support file.

Combined with support monitoring data, this input facilitates observations of diverse environments of persons with disabilities.

2. The possibility to record time spent on particular service users. To provide an appropriate representation of a given hour of a job coach’s work in the monitoring system, a user must define whether the hour was spent on a client’s/clients’ vocational development (direct support), or was associated with duties of another nature (indirect support), such as meetings of teams of job coaches, training dedicated to the improvement of job coaches’ skills, informational-promotional activities, travel, appointments with superiors, development of an employers’ database, contact with employers or other labour market entities that are not associated with any specific client, etc.
3. When specifying the nature of support provided to a client per hour spent, a job coach should be able to indicate one of five stages of supported employment and select a specific type of activity assigned to that stage. Below is the list of stages to choose from, categorised into direct and indirect support.

I. Direct support:

- a) engagement (a stage that ends with the signing of a contract with a client), which includes the following forms of support:
 - recruitment meeting,
 - a job coach and a client presenting themselves, presentation of supported employment,
 - gathering of preliminary data on a client,
 - development and finalising of a contract;

b) development of a vocational profile, which includes the following forms of support:

- consulting diagnosis of job preferences and aptitude,
- diagnosis of social competence,
- support in organising “job samples”,
- support during “job samples”,
- group workshops, the scope of which may be fine-tuned, such as workshops on social competences and finding one’s way around the labour market,
- development of an Individual Vocational Profile and Action Plan (the Action Plan is the result of the joint effort of a job coach and his/her client; recorded on paper, it defines the client’s vocational goals, actions and their deadlines),
- face-to-face meeting with a client,
- communication training,
- direct contact with an employer,
- other items (may be added to the list);

c) job search, which includes the following forms of support:

- support for a client in development of application documents,
- linking potential employers to workers,
- identification of potential workplaces,
- support in setting up internships,
- support during internships,
- support in meeting formal requirements associated with the organisation of an internship,
- support for clients during their internship,
- face-to-face meeting with a client,
- communication training,
- group workshops, the scope of which may be fine-tuned,
- direct contact with an employer,
- other items (may be added to the list);

d) employer's engagement, which includes the following forms of support:

- face-to-face meeting with a client,
- communication training,
- group workshops, the scope of which may be fine-tuned,
- direct contact with an employer,
- making a client familiar with a job description,
- support for a client in preparation for a job interview,
- preparing an employer and other employees for cooperation with a client,
- setting up a trilateral meeting (job candidate, job coach and employer),
- support for a client and employer in employment procedures,
- taking a job (signing a contract with an employer),
- other items (may be added to the list);

e) on- and off-the-job support which includes the following forms of support:

- supporting a client in formal issues,
- supporting a client in their performance of work duties,
- on-the-job training,
- supplementary training or training interventions,
- monitoring job performance while staying in touch with an employer,
- periodic performance appraisal,
- job coaching support/support on the job,
- off-the-job support,
- communication training,
- support groups, the scope of which may be fine-tuned,
- other items (may be added to the list).

II. Indirect support (without a service user's involvement):

- a) meetings of a team of job coaches, including coaching sessions,
- b) skills improvement training courses for specialists,
- c) meetings with managers of job coaches,

- d) consultations among team members,
- e) consultations with specialists – the drop-down list includes psychologist, psychiatrist, vocational counsellor (further professions may be added into a list),
- f) informational and promotional activities – the drop-down list includes the following items:
- meeting at an NGO/foundation,
 - meeting at an employment agency,
 - meeting at a vocational therapy workshop,
 - meeting at a self-help community centre,
 - meeting at a nursing home,
 - meeting at a support centre,
 - meeting with a person with disabilities,
 - meeting with a family of/other people close to a person with disabilities,
 - leaflet distribution,
 - promotion by e-mail/phone calls,
 - other items (may be added to the list);
- g) work travel,
- h) work associated with documentation,
- i) organising hands-on activities – the drop-down list features specific action items such as internship, on-the-job training, “job samples”,
- j) labour market analysis – the drop-down list features the following items:
- direct contact with employers,
 - contact via e-mail/phone with employers,
 - analysis of press and online job ads,
 - other items (may be added to the list);
- k) contact with other labour market entities – other items (may be added to the list);
- l) other action items (there is the option to add other action items that do not feature in a catalogue).

4. The possibility of periodic measurement of indices at the level of:
 - a) implementation of the whole programme/financial settlement period,
 - b) teams that implement the supported employment programme,
 - c) activities undertaken by individual job coaches.
5. A database/documentation register set up within the system should feature various access levels, reflecting the needs of:
 - a) job coaches – access to all documentation and personal tabs on persons with a disability that require completion,
 - b) mentors (job coach coordinators) – access to documents, lists and reports with an option of editing and adding comments on completed documents; the possibility to generate relevant reports,
 - c) specialists for the coordination of job coaches' performance,
 - d) manager,
 - e) clearing institution.

CHAPTER II

DATA RECORDING WITHIN THE MONITORING SYSTEM

It is recommended that an IT tool is used to monitor a supported employment process. However, standard paper documentation may be applied instead if necessary.

The system records the following types of data:

1. data on supported employment client – the participant,
2. data on technical experts, including job coaches, vocational counsellors, psychologists and other members of an interdisciplinary team,
3. data on an employer – party to the signed agreement on cooperation within the model supported employment,
4. data on activities performed by technical experts.

1. CLIENT DATA IN THE SUPPORTED EMPLOYMENT PROCESS

Data gathered in four files:

1. A personal file, which contains:
 - a participant's personal data (first name, surname, PESEL [personal identity number]– participant's age and sex should be automatically generated),
 - place of residence (urban area/size of city or town/rural area, address, contact data of the participant and/or his/her close relative, phone number, e-mail address),
 - degree of disability (mild, moderate, severe), type of disability (in accordance with the regulation on disability and disability degree certification¹),
 - education (none, elementary, junior secondary school, secondary school, post-secondary school, tertiary education) with an option of specifying each level of education;
 - support centre attendance (attendee, graduate, not specified; for attendees and graduates, the type of centre and the period of attendance should be specified),
 - labour market status (unemployed, long-term unemployed, job seeker, vocationally inactive),

¹ Regulation of the Minister of Economy, Labour and Social Policy of 15 July 2003 on disability and disability degree certification, Official Journal of Laws No 139, item 1328.

- work experience (open/sheltered employment with duration of service); it is possible to indicate both options or a lack of experience,
- social benefits: allowances, pensions, etc.,
- incapacitation (yes/no, partial/total).

At the level of recruitment, the system displays only the basic “personal file” which contains the following data: personal data, PESEL, address of residence, contact data. Entering the file into the system enables a user to select participants from a list to register actions with a participant’s direct involvement. After a given person has been deemed eligible for a supported employment service, the system allows the user to edit the remaining data from the personal file.

2. Participation file, which contains the following data:

- date of admission to the programme (recruitment date),
- date of and reasons for programme termination (completion according to the plan, early termination, resignation),
- date of return to the programme.

3. Hands-on activity file, which contains the information on:

- internships – contract duration, position, employer’s name,
- placements – contract duration, position, employer’s name,
- job samples – dates, hours, scope of responsibilities, employer,
- voluntary work – contract duration, position, employer’s name,
- employment – contract duration, type of contract (employment contract, contract for specific service, contract for specific work), position, employer’s name, number of working hours per month.

4. Support file, which contains:

- vocational profile – data on a participant’s level of competences (general, social and vocational),
- monthly report on cooperation between the supported employment expert and his/her client,
- support – information on the type and number of hours of support, including the possibility of generating a report which accounts for one or many participants/one or many forms of support per number of hours and/or number of persons.

2. DATA ON TECHNICAL EXPERTS, INCLUDING JOB COACHES, VOCATIONAL COUNSELLORS, PSYCHOLOGISTS AND OTHER MEMBERS OF INTERDISCIPLINARY SUPPORT TEAMS

Data gathered in five files:

1. A personal file (to be accessed by a mentor), which contains:

- first name and surname,
- PESEL,
- position (job coach, vocational counsellor, psychologist, other),
- form and period of employment, working time, duration of leave,
- for external entities: number in the National Court Register (Krajowy Rejestr Sądowy, KRS) or a different register of business activity.

2. **Participants** – list of names of participants who are supported by a technical expert, including access to all client data. It is also necessary to enable a mentor to share access to another participant's tab with an expert (e.g. in cases where one specialist calls in sick).

3. Work record files, which contain:

- classification of support into support directly associated with a participant and indirect support (without a participant's direct involvement),
- printable periodic reports, to be generated from direct support activities on a monthly basis (other periods of time are possible),
- input data for the "support" sub-tab in the "participants" tab, to be generated from direct support data.

4. Conclusions:

- browsing for job coach files (using a technical expert's ID and work file ID), including insight into their status (rejected, submitted, approved),
- approval or rejection of a job coach's work file (reasons for rejecting a file must be stated),
- a mentor has the possibility of cancelling an already approved work file.

5. **The organiser** – this should be available to a job coach only, and not to a mentor.

3. DATA ON AN EMPLOYER – PARTY TO A SIGNED AGREEMENT ON COOPERATION WITHIN SUPPORTED EMPLOYMENT SERVICES

Data shall be gathered in three files:

1. File on a work establishment, which contains the following items:

- workplace/company name,
- workplace/company address,
- National Court Register number,
- workplace/company size (micro-, small, medium-sized or large enterprise),
- industry (to be selected from the relevant list),
- sector (I, II, III),
- contact person (contact data, phone number, e-mail).

2. Job analysis

3. Register of agreements on cooperation with employers (there is the possibility to generate a report with an attached register of agreements).

4. DATA ON ACTIVITIES PERFORMED BY TECHNICAL EXPERTS

Work record files, designed to record working hours and tasks, help register activities performed by job coaches. The activities accounted for in record files may fall into the following categories:

1. work for clients that fits into any of the five stages of supported employment– direct support,
2. work that is not directly linked to a client – indirect support.

In the case of work for clients that fits into any of the five stages of supported employment, the monitoring process consists in collecting data on:

1. the receiver of the support (client's data),
2. participants of the support: client only, client and employer, client and his personal network,

3. type of provided support:
 - a) stage of supported employment,
 - b) form of support,
4. when the support was provided (date),
5. duration of the support (in sexagesimal format – 00.00) – with the level of detail up to within 30 minutes.

In the case of work that is not directly linked to a client, monitoring shall consist in collecting data on:

1. person doing the work (job coach's personal data),
2. type of work (to select from a list):
 - meetings of a job coaches' team, including coaching meetings,
 - skills-improvement training for specialists,
 - meetings with managers,
 - consultations among team members,
 - consultations with experts – the drop-down list features a psychologist, psychiatrist, vocational counsellor (other items/professions can be added to the list),
 - informational and promotional activities – a drop-down list features the following items:
 - meeting at an NGO/foundation,
 - meeting at an employment agency,
 - meeting at a vocational therapy workshop,
 - meeting at a community self-help centre,
 - meeting at a nursing home,
 - meeting at a support centre,
 - meeting with a person with disabilities,
 - meeting with a family of/people close to the person with disabilities,
 - leaflet distribution,
 - promotion via e-mail/phone,
 - other items (may be added to the list),

- work travel,
 - work related to documentation,
 - arrangement of hands-on activities to be selected from the drop-down list; the list features specific action items, such as internships, hands-on training and job samples,
 - labour market analysis – a drop-down list features the following items:
 - direct contact with employers,
 - contact via phone/e-mail with employers,
 - analysis of press and online job ads,
 - development of an employers' database,
 - other items (may be added to the list),
 - contact with other labour market entities – other items (may be added to the list),
 - other actions (other action items, which do not feature in a catalogue, may be added to the list),
3. when the work was performed (date),
 4. work duration (in sexagesimal format – 00.00) – with the level of detail up to within 30 minutes.

5. TOOLS SUPPORTING PERFORMANCE AND MONITORING OF JOB COACH PERFORMANCE

1. The organiser (calendar) – accessed by a job coach only; the calendar is a job coach's scheduling tool. A mentor's diary is available in the same format.
2. Notebook for technical experts – accessed by an authorised user only.
3. Work file.
4. Reports.

The organiser features the following key functionalities:

1. work to be done,
2. recording the events that a job coach considers to be relevant,

3. a note-taking option,
4. calendar,
5. contacts.

The organiser should also be easy to use for users who are not familiar with this type of application.

Notebook – offers the possibility to save one’s own notes. It comes in the form of a blank page of a document file, to be used by a technical expert for note-saving and editing.

The work file enables a user to document activities performed by job coaches and other technical experts.

Work file layout should be modeled after the file recording working hours and tasks. However, the work file should not offer a client selection option. A single record (equivalent of a single instance of support) shall be mapped to a specific activity that has been saved by a job coach in a file recording working hours and tasks.

Application user (mentor, job coach) shall select one of three views of saved data:

1. list of support hours – work for a client that fits into any of the five stages of supported employment,
2. list of extra activities – work not directly linked to a client,
3. complete set of information (support hours + extra activities).

Reports – generated from the data in the system:

1. report on “participants of supported employment programme”,
2. quantitative report on hands-on activities,
3. report on support (technical and time-bound path of support),
4. report on performance of a technical expert, including the possibility of generating aggregate data, and data on direct or indirect support only,
5. monthly report on direct support, to be generated by a mentor.

CHAPTER III

MANAGEMENT OF JOB COACH PERFORMANCE

– SUPPORTED EMPLOYMENT IMPLEMENTATION PROCEDURE

Management of job coach performance shall be defined as a comprehensive description of standard activities performed by the job coach that are linked to the provision of support to a service user, as well as guidelines on work documentation and management of teams of job coaches by a mentor (service coordinator). Structured around these components, the procedure of supported employment implementation also features specific tools for job coaches. The tools are available in the form of appendices, formally linked to a procedure.

In the future, a supported employment service may be implemented by variously structured entities, representing different corporate cultures and legal statuses (public finance sector entities, non-governmental organisations, commercial entities). Given that, the procedural solutions listed below contain flexible components, e.g. statements such as “it is recommended that (...) at least every (...)”. This approach will facilitate the best possible tailoring of the service’s management-related components to the needs of an entity that will implement the service. Flexibility is also a must in defining the methods of job coach recruitment.

1. DOCUMENTATION REQUIRED DURING SERVICE IMPLEMENTATION²

The following documents are required within the service:

- a) Application form (template in appendix 1),
- b) Statement that confirms eligibility for supported employment programme (template in appendix 2),
- c) Contract between client and job coach (template in appendix 3),
- d) Vocational profile (template in appendix 4),
- e) Client’s performance progress file (template in appendix 5),
- f) File recording job coach’s working hours and tasks (template in appendix 6),
- g) Monthly report on cooperation between a technical expert and client (template in appendix 7),

² Available as appendices to this set of documents, templates represent the minimum scope of information and may be further developed to meet the requirements related to procedures applied by a given funding institution.

- h) Job analysis (template in appendix 8),
- i) Agreement with an employer (template in appendix 9),
- j) Assessment file for cooperation between a job coach and client (template in appendix 10),
- k) Assessment file for cooperation between a job coach and employer (template in appendix 11).

1. Application form:

- a) this document is valid in paper version only,
- b) this document must be completed by a person who wants to use the service provided by a job coach; once updated and signed, it must be submitted at the office.

2. A statement that confirms eligibility for a supported employment programme:

- a) this document is valid in paper version only; it is filled in after the recruitment has been completed.

3. Contract between a client and job coach:

- a) this document is valid in paper version only,
- b) this document must be signed by a job coach and client for a definite period of time.

4. Vocational profile:

- a) this document is valid in both paper and electronic versions,
- b) this document is developed and signed after a diagnosis has been made and a client's potential has been identified,
- c) the last component of a Vocational Profile - an Action Plan is updated by means of an annex each time a client and job coach decide to change/add new elements to the vocational development process; it must be stored in paper version only.

5. A client's performance progress file:

- a) this document is valid in paper version only; it is completed upon the client's admission to the programme, in the course of the support implementation and after its termination.

6. File recording a job coach's working hours and tasks:

- a) this document is valid in electronic version only,
- b) this document must be updated on a regular basis (recommended frequency: on a daily basis),

- c) this document is completed according to current instructions,
 - d) the data, collected by means of work record files, is available to a mentor on an ongoing basis; it provides input for the detailed monitoring of a job coach's performance by a mentor.
7. Monthly report on cooperation between a technical expert and client:
- a) this document is valid in electronic version only,
 - b) this document is updated by a technical expert once per month,
 - c) this document is used for analysis of a technical expert's performance by a mentor; it helps a mentor to identify problems encountered by a job coach in his/her work and to schedule feedback sessions (at least once per quarter); the objective of these sessions is to solve a given problem as well as to increase the job coach's effectiveness and improve clients' satisfaction with his/her performance.
8. Job analysis:
- a) this document is valid in electronic version only.
9. Agreement with an employer:
- a) this document is valid in paper version only,
 - b) this document is signed by a job coach and employer for a definite period of time.
10. Assessment file for cooperation between a job coach and client:
- a) this document is valid in paper version only,
 - b) a mentor is responsible for the process of handing the document over to clients, as well as collecting opinions on a job coach's performance,
 - c) a mentor conducts the appraisal at least once per quarter; this is designed to improve the quality of service provided to a client; a coaching talk between a mentor and job coach ends the process of assessing the job coach's performance by a client.
11. Assessment file for cooperation between a job coach and employer:
- a) this document is valid in paper version only,
 - b) a mentor is responsible for collecting employers' opinions on a job coach's performance,
 - c) a mentor conducts the appraisal at least once per quarter by sending assessment forms to all employers with whom a job coach has worked for at least a month; designed to improve the quality of service provided to an employer, a coaching session between a mentor and job coach ends the process of a job coach's assessment.

2. FUNDAMENTAL TYPES OF SUPPORT PROVIDED BY JOB COACHES

1. Support in supported employment is provided by a job coach.
2. Job coaches directly report to a mentor.
3. It is recommended that the number of members of a team of technical experts, managed by one (1) mentor, does not exceed fifteen (15).
4. It is recommended that an inexperienced job coach works with two-three clients at a time. An experienced job coach may effectively support a maximum of 10 persons (seven-nine of these should be at the monitoring stage and have received extensive on-the-job training). A job coach with 10 clients at the employment stage shall not take on new clients. He/she may hand over some of his/her clients to another job coach and only then take on new clients.
5. A client shall receive support at the following stages of supported employment:
 - a) engagement,
 - b) vocational profile development,
 - c) job finding,
 - d) engagement of an employer,
 - e) on- and off-the-job support.

3. CLIENT ENGAGEMENT IN SUPPORTED EMPLOYMENT SERVICE

1. Engagement, designed to analyse a client's needs and vocational potential, is the first stage of supported employment. The duration of the engagement stage shall not exceed one month.
2. The engagement stage ends with a joint decision by client and job coach as to whether to continue or discontinue the supported employment service.
3. A client who decides to remain in supported employment signs a contract with a job coach.
4. The contract, concluded for a definite period of time, describes the rules of using the service by a client and the job coach's responsibilities towards his/her client.

5. The contract's duration is determined by a job coach after consultation with the client; the contract's duration may be extended upon the request of a client or a job coach, e.g. in a situation when a full vocational development process has not yet been completed (no stable employment on the open labour market has been achieved).
6. After the contract has been signed, a client's vocational profile is developed (it contains an Action Plan). The profile provides the basis for subsequent stages of the service.
7. A job coach shares the information on clients and contracts with a mentor.
8. The mentor and job coach are obliged to mutually share information on clients using the supported employment service.
9. Meetings of job coach teams, designed to facilitate the exchange of information, are regularly convened by a mentor (recommended frequency: at least once per week).
10. Together with his/her mentor, a job coach performs a qualitative assessment of each client's progress (by filling in a client's qualitative performance progress file). The file is filled in upon the client's admission to the programme and on the termination of his/her participation in the programme. It is also updated in the case of a significant/noticeable progress or regress in the client's performance (mid-term file).

4. TERMINATION OF CLIENT ENGAGEMENT IN SUPPORTED EMPLOYMENT

1. A client terminates cooperation with a job coach once the contract has expired. In the best-case scenario, the contract is terminated once the client has obtained stable employment on the open labour market and no longer needs the support of his/her job coach.
2. A client may opt out of the supported employment service prior to the contract's expiry date in cases of breach of contract and when further support is no longer needed (when the desirable outcome, i.e. stable employment on the open labour market, is achieved earlier than planned).
3. In the case of early termination of a contract, the job coach shall inform his/her mentor that the contract has terminated early.
4. Each client that terminates cooperation with a job coach shall receive feedback information, including reasons for the cooperation's termination, a summary of activities performed and recommended further steps. Two copies of the document shall be drawn up (one copy is to remain in the office, the other is to be handed to the client).
5. Under special circumstances, a client who no longer receives support from a job coach or other specialist may be provided with the service once again.

5. WORK STRUCTURE AND PERFORMANCE INDICATORS FOR JOB COACHES

1. The manager/coordinator, supported by coordination specialists, is in charge of the coordination of task execution and clearing.
2. The mentor is responsible for strategic planning of the work of job coaches:
 - a) it is recommended that a mentor requests certain indices (number of employed persons, number of persons remaining in employment, etc.) from the team once per quarter and requests that the team perform obligatory activities (e.g. promotion of the service at job fairs) in a specific period of time,
 - b) it is advisable that the whole team of job coaches participate in the planning process, given that the plans for individual job coaches must derive from strategic planning at a „macro-service” level (tasks executed by all job coaches reporting to one mentor).
3. With a mentor’s approval, a job coach puts a strategic plan into operation. Special emphasis is placed on the development of a detailed schedule of support activities for individual clients.
4. Daily reports, developed on the basis of records of working hours, enable a job coach to closely monitor the implementation of plans. Moreover, they allow for the ongoing verification by a mentor of a job coach’s performance.
5. It is recommended that a mentor should organise a meeting for the whole team of job coaches once per week; this can also be in the form of a teleconference:
 - a) meetings shall be dedicated to discussing the current status of work, including results of job coach activities, as well as to solving any problems that arise,
 - b) meetings will be a way in which supervision is conducted, and should play a crucial part in particularly problematic cases (e.g. low levels of performance and effectiveness, difficult relations with challenging clients, symptoms of professional burnout in a job coach, etc.),
 - c) in the case of support activities that cover a whole region of the country (a province), alternative forms of meetings, such as teleconferences, are acceptable.
6. Monthly job coach reports are an important component of the supported employment management system:
 - a) reports enable a mentor to learn the accomplishment status of tasks and indices; they also offer him/her a deeper insight into a job coach’s performance, achievements in cooperation with clients, related problems, etc.,
 - b) a mentor, also having access to the monitoring system’s data that comes from job

coaches' monthly reports, is able to diagnose key risks, such as failure to accomplish target indices and/or activities, key employers pulling out of the programme, a job coach quitting his/her job,

- c) it is recommended that a mentor has a pep talk with each job coach once per month; the talk shall revolve around the contents of monthly reports and data from the monitoring system.
7. A mentor shall conduct a periodic (preferably quarterly) in-depth analysis of each job coach's performance:
- a) the analysis is based on the data from the monitoring system, monthly reports, job coach performance appraisals from clients and employers, and the qualitative performance progress files of individual service users,
 - b) the analysis focuses on the effectiveness of a job coach's performance (level of accomplishment of indices for a given period), work methodology (frequency of meetings with clients, occurrence of particular stages of supported employment in a client's path), relations with clients, employers, their team, etc.,
 - c) the analysis ends with a feedback session between a mentor and job coach, which may last several hours,
 - d) the duration of the feedback session, the degree to which it is structured and the problem patterns depend on the quality and effectiveness of a given job coach's performance; in the case of job coaches who have met all target indices and are valued by both clients and employers, the session may be reduced to a brief summary and reinforcement; highly structured sessions geared towards changing a job coach's attitude are to be expected in the case of job coaches whose performance has fallen below target indices and who have entered into conflicts with other stakeholders within the service.

6. MANAGEMENT AND MONITORING OF JOB COACH PERFORMANCE

– SYSTEMIC RECOMMENDATIONS

Far from being a quick-fix solution, supported employment is a service that must be controlled by means of rules and regulations. However, it is not recommended that management decisions are made subject to detailed procedures.

Support tasks should be implemented by cross-disciplinary teams. In the future, job coaches will be assigned to different teams. The differences within teams will reflect the diversity of entities in charge of supported employment programmes, different client groups and the varied scope of support offered by organisations and institutions.

1. A full-time employment contract is considered the most effective form of employment for job coaches. This type of contract gives an employee a sense of security and also obliges him/her to become fully engaged in his/her job responsibilities and invest in his/her professional development. This form of employment is recommended for general use.
2. Given the scope of a job coach's responsibilities, it is suggested that a task-based schedule or flexible working hours is used to allow for flexible schedule planning, which takes into account the needs of both clients and employers.

It is recommended that a two-track task planning process is adopted. It includes:

1. strategic planning by a whole team, including a job coach (setting up long-term goals and outcomes),
2. planning conducted directly by a job coach (ongoing development of support schedules for individual clients according to their needs).

It is recommended that a job coach's performance is managed on two levels:

1. formal management which takes the form of:
 - a) weekly team meetings designed to discuss the status of work, including a job coach's performance, and to solving problems that arise,
 - b) monthly reporting on work done, including such documents as timesheets, documentation on contact with an employer, documentation on cooperation with clients (which should contain observations and findings concerning work done; required documentation shall not be too bulky, so that a job coach is not unnecessarily distracted,
 - c) periodic, e.g. quarterly, verification of the effectiveness and efficiency of activities undertaken by a job coach; the verification shall be based on the level of accomplishment of the original target indices (depending on general targets) and on a client's qualitative performance progress file,
2. informal management which takes the form of:
 - a) collecting feedback information on a job coach's performance from a client's family, employer and people from a client's environment,
 - b) a job coach's performance progress assessment, to be conducted by a whole team, particularly when an individual is in the initial stages of assuming job coach responsibilities.

APPENDICES

1. Application form	29
2. Statement confirming eligibility for supported employment programme	30
3. Contract between client and job coach	33
4. Vocational profile	34
5. Client performance progress file	39
6. File for recording job coach's working hours and tasks	48
7. Professionals' monthly report on cooperation with a client	49
8. Job analysis	50
9. Cooperation agreement with employer	54
10. Assessment file for cooperation between job coach and client	55
11. Assessment file for cooperation between job coach and employer	57
12. User's manual for the electronic monitoring system (ESM)	59

APPENDIX 1

Place and date:

APPLICATION FORM

First Name:	Surname:	PESEL:
Age:	Area:	Postal code:
Province:	County:	Commune/Municipality:
Miejscowość:	Ulica:	Nr lokalu:
Landline Phone number:	Mobile Phone number:	E-mail address:
Sex:	Degree of disability:	Type of disability:
Education:	Employment status:	including:

KEY FUNCTIONAL LIMITATIONS:

--

COMMENTS:

--

APPENDIX 2

STATEMENT CONFIRMING ELIGIBILITY FOR SUPPORTED EMPLOYMENT PROGRAMME

.....
(Candidate's first name and surname)

Candidate's special needs that indicate the need to provide support to help him/her enter and remain on the open labour market:

L.p.	Description of limitations/challenges	Notes ³
1.	Challenges in the scope of: – reasoning <input type="checkbox"/> yes <input type="checkbox"/> no – understanding <input type="checkbox"/> yes <input type="checkbox"/> no – planning <input type="checkbox"/> yes <input type="checkbox"/> no – deduction <input type="checkbox"/> yes <input type="checkbox"/> no – problem solving <input type="checkbox"/> yes <input type="checkbox"/> no – abstract thinking <input type="checkbox"/> yes <input type="checkbox"/> no – fast and permanent learning <input type="checkbox"/> yes <input type="checkbox"/> no	
2.	Preferred learning method: – based on personal experience (instead of theory) <input type="checkbox"/> yes <input type="checkbox"/> no – through repetition <input type="checkbox"/> yes <input type="checkbox"/> no	
3.	Challenges in the scope of: – transferring an acquired skill from one situation to another, including similar situations <input type="checkbox"/> yes <input type="checkbox"/> no	
4.	Limited capacity in: – independent identification of information needed for task execution <input type="checkbox"/> yes <input type="checkbox"/> no – determining how to elicit and apply information that is key to task execution <input type="checkbox"/> yes <input type="checkbox"/> no	

³ Notes should include and/or further define other limitations/challenges not mentioned in particular rows.

L.p.	Description of limitations/challenges	Notes ³
5.	Challenges in the scope of: – predicting threats <input type="checkbox"/> yes <input type="checkbox"/> no – choosing a safe course of action <input type="checkbox"/> yes <input type="checkbox"/> no – predicting consequences of undertaken steps <input type="checkbox"/> yes <input type="checkbox"/> no	
6.	Challenges in the scope of: – independent development of a (step by step) process of executing an assigned task <input type="checkbox"/> yes <input type="checkbox"/> no	
7.	Communication problems: – limited vocabulary <input type="checkbox"/> yes <input type="checkbox"/> no – serious speech disorders <input type="checkbox"/> yes <input type="checkbox"/> no – anxiety <input type="checkbox"/> yes <input type="checkbox"/> no – withdrawal <input type="checkbox"/> yes <input type="checkbox"/> no – lack of contact (e.g. in autism) <input type="checkbox"/> yes <input type="checkbox"/> no – deafness <input type="checkbox"/> yes <input type="checkbox"/> no – blindness <input type="checkbox"/> yes <input type="checkbox"/> no – other items (may be added).....	
8.	Challenges in the scope of: – establishing and keeping positive relationships <input type="checkbox"/> yes <input type="checkbox"/> no – dealing with stress <input type="checkbox"/> yes <input type="checkbox"/> no – avoiding conflict <input type="checkbox"/> yes <input type="checkbox"/> no	
9.	Challenges in the scope of: – rational, rather than emotional, thinking <input type="checkbox"/> yes <input type="checkbox"/> no – interpretation of surrounding reality <input type="checkbox"/> yes <input type="checkbox"/> no – interpretation of social situations <input type="checkbox"/> yes <input type="checkbox"/> no	

L.p.	Description of limitations/challenges	Notes ³
10.	Challenges concerning: – adaptation to new or changing circumstances <input type="checkbox"/> yes <input type="checkbox"/> no – dealing with new challenges <input type="checkbox"/> yes <input type="checkbox"/> no – anxiety <input type="checkbox"/> yes <input type="checkbox"/> no – tendency to withdraw oneself <input type="checkbox"/> yes <input type="checkbox"/> no – tendency to run away/escape <input type="checkbox"/> yes <input type="checkbox"/> no – loss of motivation <input type="checkbox"/> yes <input type="checkbox"/> no	
11.	Problems with: – spatial orientation <input type="checkbox"/> yes <input type="checkbox"/> no – functional orientation <input type="checkbox"/> yes <input type="checkbox"/> no	
12.	Serious motor problems associated with multiple disabilities: – quadriplegia <input type="checkbox"/> yes <input type="checkbox"/> no – chorea – in pyramidal -extrapyramidal syndrome <input type="checkbox"/> yes <input type="checkbox"/> no – other items (may be added)	
13.	Other items (may be added)	

Based on an interview and submitted documentation, such as

- a disability certificate,

- other

it is certified that Ms/Mr
 meets/does not meet* the conditions for participation in a supported employment programme.

Statement of reasons for participant's eligibility for the programme:

.....

(signatures of professionals deciding on candidate's eligibility)

APPENDIX 3

CONTRACT BETWEEN CLIENT AND JOB COACH

concluded in on (date)between:

.....

represented by the job coach:

.....

and

.....

hereinafter referred to as “the client”,

Stipulating as follows:

§ 1

The subject matter of this contract is a joint undertaking, aimed at helping the client find and retain employment.

§ 2

The parties to the contract have agreed that the activities which are referred to in § 1 shall be executed by means of supported employment and using the job coach’s support.

§ 3

The activities that require the client’s involvement will be described in the “Vocational Profile” document. The document must be approved by the client.

§ 4

The client shall regularly participate in the activities stated in the “Vocational Profile”.

§ 5

The client shall recognise the fact that cooperation with him/her may be terminated in the event of failure to fulfill the obligation specified in § 4.

§ 6

Two identical copies of the contract have been prepared, one for each of the parties.

Signature of client:

Signature of job coach:

.....

.....

Additional information (support provided by family and specialists, contact data)

III. SOCIAL BENEFITS

(Do they impact willingness to undertake employment? If so, how?)

IV. EDUCATION

Together with your client, analyse his/her education path to date.

Dates	School/education facility	Certificates	Titles

V. TRAINING COURSES

Together with your client, analyse his/her qualifications acquired in the course of trainings.

Dates	Training provider	Training scope	Certificates

Other relevant information/qualifications (driving license, fork lift operator's license, etc.)

VI. EMPLOYMENT RECORD

Together with your client, analyse his/her employment history.

Dates	Employer (workplace data)	Name of a position	Responsibilities	Reason for leaving

VII. CLIENT'S VOCATIONAL PROFILE

ASSESSMENT OF SOCIO-VOCATIONAL SKILLS

Based on your client's qualitative performance progress file, describe his/her socio-vocational skills (all aspects should be considered). Consult with your client regarding this description in order to verify its contents and revise it if necessary.

VIII. JOB PREFERENCES

When at the stage of defining professional preferences, your client expresses his/her expectations as regards his/her future job. The job coach's role at this stage is to provide the client with support to help him/her make their professional aspirations more realistic, and make them aware of their own potential and ability to take on their preferred job.

Preferred job

Preferred responsibilities (e.g. office work, retail, catering, IT services, finance, warehousing, hotel work, etc.)

<p>Preferred work conditions (full-time/part-time work, work during the day, work in the evenings, work during the week, work over weekends, shift work, expected remuneration, etc.)</p>
<p>Preferred work environment (work outside/inside a building, quiet/noisy surroundings, large/small workplace, slow-paced/intense work)</p>
<p>Other (distance from home, preferred means of transport, etc.)</p>

ACTION PLAN

<p>GOALS TO BE ACHIEVED A client must feel co-responsible for planning his/her own professional goals. Involving the client at the planning stage increases the chances the goals being met (a person who identifies him/herself with their goal is more motivated and driven)⁴.</p>			
Item No.	Established goals	Suggested deadline	Person responsible for providing support to achieve goal
1.			
2.			
3.			
4.			
5.			
<p>Additional goals: It is necessary to consider other/additional goals that may impact the process of planning for vocational development, and which have arisen in the course of the identification of a client’s needs.</p>			
<p> </p>			

⁴ More rows should be added to the table for additional goals

Barriers and challenges:

When you start planning vocational goals with your client, both of you should try to identify potential challenges/barriers to their accomplishment. The client must be fully aware of possible obstacles in the process and determine an adequate support strategy with his/her job coach to address any potential problems.

Identified barrier	Suggested scope of support	Person responsible for support

Action Plan (AP) implementation:

Start date of AP implementation:/ DD-MM-YY
Planned end date of AP implementation:/ DD-MM-YY
Actual end date of AP implementation:/ DD-MM-YY

APPENDIX 5

CLIENT PERFORMANCE PROGRESS FILE

.....
Date of evaluation

<p style="text-align: center;">Client</p> <p>Surname:</p> <p>Date of admission to programme:</p>	<p style="text-align: center;">Person completing the form</p> <p>Surname:</p>
---------------------------------------------------------------------------------------------------------------------	--------------------------------------------------------------------------------------------

Type of evaluation:	Initial	Ongoing/employed	Ongoing/unemployed		
Supported employment stage:	Engagement	Vocational profile development	Job search	Employer's engagement	On-site and outside -of -work support
Total current number of worked:		Hours per week _____	Months per year _____		

Note: PLEASE DO NOT LEAVE ANY BLANK FIELDS

Based on observation of the client and interviews with persons who know him/her (relatives, carers, therapists and employers), the most appropriate answer should be selected to each question in the table.

GENERAL COMPETENCIES

<p>1. Physical appearance: (select the right answer)</p> <p>Additional remarks/ comments</p> <p>.....</p>	Unkempt/lack of personal hygiene	Tidy/clean	Neat clothes/ unwashed	Shabby clothes/ washed	
<p>2. Time awareness: (select the right answer)</p> <p>Additional remarks/ comments</p> <p>.....</p>	Unaware of time and the role of the clock	Aware of breaks (including meal breaks)	Able to tell the time to within an hour	Able to tell the time to within an hour and a minute	Familiar/ unfamiliar with a calendar

3. Practical ability to read: (select the right answer) Additional remarks/ comments	None	Visual memory of words/ characters	Basic literacy	Fluent reader	
4. Practical mathematical skills: (select the right answer) Additional remarks/ comments	None	Simple counting	Simple addition/ subtraction	Able to use a calculator	
5. Ability to cross the road unassisted: (select the right answer) Additional remarks/ comments	Requires support to cross the road	Able to cross the road unassisted if there are traffic lights	Able to cross the road unassisted also in the absence of traffic lights		
6. Use of means of public transport: (select the right answer) Additional remarks/ comments	Lack of ability to use means of transport	Requires another person's support	Able to use unassisted some of the means of transport on a specific route	Able to use unassisted some means of transport on various routes	Able to use unassisted various means of transport on a variety of routes
7. Spatial orientation: (select the right answer) Additional remarks/ comments	None	One room	Several rooms	Premises of a building	Premises of a building and adjacent grounds
8. Learning - ability to acquire new skills and knowledge: (select the right answer) Additional remarks/ comments	Unable to learn	Severe learning difficulties	Significant learning difficulties	Mild learning difficulties	Lack of learning difficulties
9. Punctuality: (select the right answer) Additional remarks/ comments	Always late and leaves early	Often late or leaves early	Sometimes late or leaves early	Most of the time clocks in and out on time, occasionally late	Always clocks in and out on time and is punctual

SOCIAL COMPETENCIES

I. SELF-AWARENESS

1. Self-esteem – perception and evaluation of one’s own potential and limitations: (select Yes or No in each field)	Inadequate self-esteem, too high or too low opinion of oneself	Usually inadequate self-esteem, occasional adequate self-evaluation	Partially adequate self-esteem	Usually adequate self-esteem, occasional inadequate self-evaluation	Adequate self-esteem, accurate perception of one’s strengths and weaknesses
	Yes / No	Yes / No	Yes / No	Yes / No	Yes / No
Additional remarks/ comments				
2. Awareness of one’s own identity: (select Yes or No in each field)	Almost indiscernible awareness of one’s own identity	Usually aware of his/her own identity	Aware of his/her own identity		
	Yes / No	Yes / No	Yes / No	Yes / No	Yes / No
Additional remarks/ comments				

II. COMMUNICATION

1. Reporting information: (select Yes or No in each field)	Unable to report information	Often reports information in an incomprehensible manner	Reports information in such a way that it can be understood only by people close to him/her	Reports information to everybody, sometimes needs support to make his/her message clear	Reports information in a clear manner
	Yes / No	Yes / No	Yes / No	Yes / No	Yes / No
Additional remarks/ comments				
2. Requesting information (asking questions): (select Yes or No in each field)	When lacking understanding, does not ask for clarification	Asks irrelevant questions	Sometimes asks relevant questions	Often asks relevant questions	Asks relevant and precise questions
	Yes / No	Yes / No	Yes / No	Yes / No	Yes / No
Additional remarks/ comments				

3. Listening to orders and questions: (select Yes or No in each field)	Does not listen to orders and questions	Rarely listens to simple orders and questions, without comprehension	Sometimes listens to simple orders and questions, but needs support to understand them	Often listens to orders and questions, but is unable to always respond to them appropriately	Listens to orders and questions, comprehends them and responds to them appropriately
	Yes / No	Yes / No	Yes / No	Yes / No	Yes / No
Additional remarks/ comments				
4. Answering questions: (select Yes or No in each field)	Does not answer questions	Rarely provides an adequate answer	Sometimes provides an adequate answer if supported	Answers questions, sometimes needs support	Provides clear and meaningful answers
	Yes / No	Yes / No	Yes / No	Yes / No	Yes / No
Additional remarks/ comments				
5. Striking up a conversation: (select Yes or No in each field)	Unable to strike up a conversation, whether with a person he/she knows or a stranger	Unable to strike up a conversation with a stranger, rarely initiates contact with a person he/she knows	Sometimes strikes up a conversation with both people he/she knows and strangers	Often strikes up a conversation with both people he/she knows and strangers, but only in familiar surroundings	Able to initiate contact with both people he/she knows and strangers
	Yes / No	Yes / No	Yes / No	Yes / No	Yes / No
Additional remarks/ comments				

III. DEALING WITH STRESS IN CHALLENGING SITUATIONS

1. Dealing with a challenging situation: (select Yes or No in each field)	Passive response to challenging circumstances	Makes clumsy and ineffective attempts to solve a problem	Occasionally makes suitable attempts to solve a problem	Often makes suitable attempts to solve a problem	Always makes suitable attempts to find the solution to a difficult situation
	Yes / No	Yes / No	Yes / No	Yes / No	Yes / No
Additional remarks/ comments				
2. Emotional balance: (select Yes or No in each field)	Emotionally volatile	Easily loses emotional balance	Sometimes able to control his/her emotions	Usually has his/her emotions under control	Emotionally stable
	Yes / No	Yes / No	Yes / No	Yes / No	Yes / No
Additional remarks/ comments				

<p>3. Dealing with conflict: (select Yes or No in each field)</p> <p>Additional remarks/ comments</p>	<p>Headstrong, it is his/her way or the highway</p> <p>Yes / No</p>	<p>Yields only to someone stronger than him/herself</p> <p>Yes / No</p>	<p>Dismisses the conflict</p> <p>Yes / No</p>	<p>Open to suggested proposals of a solution, accepts a compromise</p> <p>Yes / No</p>	<p>Makes attempts to solve the conflict, offers compromise and collaboration</p> <p>Yes / No</p>
<p>4. Reacting to change: (select Yes or No in each field)</p> <p>Additional remarks/ comments</p>	<p>Rejects change</p> <p>Yes / No</p>	<p>Responds to change, but expresses his/her disapproval</p> <p>Yes / No</p>	<p>Requires incentive, persuasion</p> <p>Yes / No</p>	<p>Approves of change</p> <p>Yes / No</p>	<p>Willingly accepts change</p> <p>Yes / No</p>
<p>5. Ability to express emotions: (select Yes or No in each field)</p> <p>Additional remarks/ comments</p>	<p>Unable to correctly identify emotions and express them appropriately to a situation</p> <p>Yes / No</p>	<p>Able to identify emotions if supported, but unable to express them appropriately to a situation</p> <p>Yes / No</p>	<p>Identifies emotions unassisted, sometimes able to express them appropriately to a situation</p> <p>Yes / No</p>	<p>Identifies emotions unassisted, expresses them appropriately to a situation most of the time</p> <p>Yes / No</p>	<p>Able to identify emotions, expresses them appropriately to a situation</p> <p>Yes / No</p>
<p>6. Taking criticism: (select Yes or No in each field)</p> <p>Additional remarks/ comments</p>	<p>Unable to take constructive criticism</p> <p>Yes / No</p>	<p>Able to take criticism if supported</p> <p>Yes / No</p>	<p>Sometimes able to take criticism</p> <p>Yes / No</p>	<p>Usually able to take criticism</p> <p>Yes / No</p>	<p>Able to take criticism</p> <p>Yes / No</p>

IV. MOTIVATION TO WORK AND DECISION MAKING

<p>1. Decision making: (select Yes or No in each field)</p> <p>Additional remarks/ comments</p>	<p>Inability to make decisions</p> <p>Yes / No</p>	<p>Able to make simple decisions if supported, but unable to predict their consequences</p> <p>Yes / No</p>	<p>Makes simple decisions, predicts their consequences if supported</p> <p>Yes / No</p>	<p>Makes simple decisions and predicts their consequences</p> <p>Yes / No</p>	<p>Makes complex decisions and predicts their consequences</p> <p>Yes / No</p>
----------------------------------------------------------------------------------------------------------------	----------------------------------------------------	-------------------------------------------------------------------------------------------------------------	-----------------------------------------------------------------------------------------	-------------------------------------------------------------------------------	--------------------------------------------------------------------------------

2. Motivation to work: (select Yes or No in each field)	Must be constantly motivated to work Yes / No	Sometimes needs to be motivated to work Yes / No	Performs a task but without engagement Yes / No	Engaged in the execution of a task Yes / No	
Additional remarks/comments					
3. Perseverance – consistent pursuit of a goal: (select Yes or No in each field)	Does not make an effort to overcome obstacles in the execution of a task; leaves a task unfinished Yes / No	Usually needs encouragement and support from others to overcome obstacles in the execution of a task Yes / No	Sometimes needs encouragement and support from others to overcome obstacles in the execution of a task Yes / No	Does not need encouragement to deal with obstacles, sometimes needs support to overcome them Yes / No	Always performs a task despite obstacles; seeks ways to overcome obstacles unassisted Yes / No
Additional remarks/comments					

V. TEAMWORK

1. Helping others: (select Yes or No in each field)	Never helps others Yes / No	Helps only those whom he/she knows, but must be encouraged or asked to do so Yes / No	Spontaneously helps people he/she knows Yes / No	Also helps strangers but must be encouraged or asked to do so Yes / No	Spontaneously helps everybody who is in need of help Yes / No
Additional remarks/comments					
2. Recognising differences among types of relationships – ability to behave appropriately toward a given group of people: (select Yes or No in each field)	Does not recognise differences between types of relationships, transfers behaviour towards one person or group to another Yes / No	Rarely recognises differences between types of relationships Yes / No	Sometimes recognises differences between types of relationships Yes / No	Usually recognises differences between types of relationships Yes / No	Notices differences and demonstrates adequate behavior toward superiors, colleagues, clients, etc. Yes / No
Additional remarks/comments					
3. Individual's acceptance of a group: (select Yes or No in each field)	Hostile towards a group, confrontational Yes / No	Alienates him/herself from a group Yes / No	Tolerates a group in his/her surroundings Yes / No	Shows moderate acceptance of a group Yes / No	Establishes an appropriate relationship with a group Yes / No
Additional remarks/comments					

VOCATIONAL SKILLS

(may be evaluated on the site during internship/on-the-job training/work)

<p>1. Physical strength, lifting and moving objects: (select the right answer)</p> <p>Additional remarks/ comments</p>	<p>Weak</p> <p>(< 5 kg)</p>	<p>Average</p> <p>(5 – 10 kg)</p>	<p>Medium</p> <p>(15 – 20 kg)</p>	<p>Strong</p> <p>(> 25 kg)</p>	
<p>2. Stamina (uninterrupted performance): (select Yes or No in each field)</p> <p>Additional remarks/ comments</p>	<p>Minimal stamina, gets tired right after starting work</p> <p>Yes / No</p>	<p>Able to work for 25 percent of a working day</p> <p>Yes / No</p>	<p>Able to work for half of a working day</p> <p>Yes / No</p>	<p>Able to work for 75 percent of a working day</p> <p>Yes / No</p>	<p>High stamina throughout a whole day</p> <p>Yes / No</p>
<p>3. Physical mobility: (select Yes or No in each field)</p> <p>Additional remarks/ comments</p>	<p>Extensive problems with mobility</p> <p>Yes / No</p>	<p>Requires support from another person to be able to move around</p> <p>Yes / No</p>	<p>Serious problems with moving around unassisted</p> <p>Yes / No</p>	<p>Experiences small problems when moving around unassisted</p> <p>Yes / No</p>	<p>Able to move around unassisted</p> <p>Yes / No</p>
<p>4. Pace of unassisted execution of a task: (select Yes or No in each field)</p> <p>Additional remarks/ comments</p>	<p>Slow pace</p> <p>Yes / No</p>	<p>Uneven pace</p> <p>Yes / No</p>	<p>Even/average pace</p> <p>Yes / No</p>	<p>Average pace, occasionally fast</p> <p>Yes / No</p>	<p>Fast pace</p> <p>Yes / No</p>
<p>5. Ability to focus on a task /persistence: (select Yes or No in each field)</p> <p>Additional remarks/ comments</p>	<p>Requires frequent stimulation</p> <p>Yes / No</p>	<p>Occasional stimulation/ requires constant supervision</p> <p>Yes / No</p>	<p>Occasional stimulation/ requires partial supervision</p> <p>Yes / No</p>	<p>Able to focus on a task, does not require supervision</p> <p>Yes / No</p>	<p>Yes / No</p>
<p>6. Ability to perform tasks in the right sequence unassisted: (select Yes or No in each field)</p> <p>Additional remarks/ comments</p>	<p>Unable to perform tasks in the right sequence</p> <p>Yes / No</p>	<p>Performs 2-3 tasks in sequence</p> <p>Yes / No</p>	<p>Performs 4-6 tasks in sequence</p> <p>Yes / No</p>	<p>Performs 7 or more tasks in sequence</p> <p>Yes / No</p>	<p>Yes / No</p>

7. Job expertise – familiarity with the scope of responsibilities, knowing how to do work and with what tools: (select Yes or No in each field)	Does not understand what to do and what tools to use	Understands what to do but fails to identify the right tools	Understands what to do and what tools to use, but fails to identify stages of work	Understands what to do and with what tools, not entirely familiar with the scope of responsibilities	Familiar with his/her responsibilities, knows how to perform them and what tools to use
	Yes / No	Yes / No	Yes / No	Yes / No	Yes / No
Additional remarks/ comments					
8. Productivity – performing a task according to adopted quantitative standards: (select Yes or No in each field)	Below the standards	25 percent productivity	50 percent productivity	75 percent productivity	Meets the standards
	Yes / No	Yes / No	Yes / No	Yes / No	Yes / No
Additional remarks/ comments					
9. Reliability - satisfactory fulfillment of work duties: (select Yes or No in each field)	Fails to fulfill his/her duties	Partially fulfills his/her duties, needs to be prompted	Performs his/her duties well, but must be strongly prompted	Performs his/her duties well, needs to be slightly prompted	Performs his/her duties well and unassisted
	Yes / No	Yes / No	Yes / No	Yes / No	Yes / No
Additional remarks/ comments					
10. Quality of work – performs tasks according to adopted qualitative standards: (select Yes or No in each field)	Performs below the standards	His/her performance is often defective	Usually performs tasks according to the standards	Performs tasks according to the standards	Excellent performance (above the standards)
	Yes / No	Yes / No	Yes / No	Yes / No	Yes / No
Additional remarks/ comments					

OTHER

1. Availability: (select Yes or No in each field)	May work on weekends	May work in evenings	May work 1/4 of full-time	May work part-time	May work full-time
	Yes / No	Yes / No	Yes / No	Yes / No	Yes / No
Additional remarks/ comments					

<p>2. Transportation: (select Yes or No in each field)</p>	Transport provided	Access to specialised transportation services	Lives on the bus route	Family provides transport	Uses his/her own means of transportation (bicycle, walking)
	Yes / No	Yes / No	Yes / No	Yes / No	Yes / No
Additional remarks/ comments					
<p>3. Family's attitude towards client's employment: (select the right answer)</p>	Strongly supportive	Supportive but with reservations	Neutral	Negative attitude towards client's employment	
Additional remarks/ comments					
<p>4. Financial situation: (select the right answer)</p>	Additional income may be an obstacle	Additional income is not an obstacle	Reduction in benefits raises concerns	Reluctance to give up benefits	
Additional remarks/ comments					
<p>5. Exercises employee's rights at his/her workplace: (select Yes or No for EACH item)</p>	Yes / No	0	=	none	
	Yes / No	1	=	sickness leave	
	Yes / No	2	=	rehabilitation allowance	
	Yes / No	3	=	holiday leave	
	Yes / No	4	=	rehabilitation leave	
	Yes / No	5	=	staff discount	
	Yes / No	6	=	other (specify)	
Additional remarks/ comments					
<p>6. Check each activity performed by a client during on-the-job training:</p>					
Clearing tables	<input type="checkbox"/>	Sweeping	<input type="checkbox"/>	Operating a washing machine	<input type="checkbox"/>
Preparing meals	<input type="checkbox"/>	Sorting linen	<input type="checkbox"/>	Washing floors	<input type="checkbox"/>
Polishing	<input type="checkbox"/>	Hoovering	<input type="checkbox"/>	Food processing	<input type="checkbox"/>
Dusting	<input type="checkbox"/>	Cleaning toilets	<input type="checkbox"/>	Rubbish removal	<input type="checkbox"/>
Organising supplies, shopping	<input type="checkbox"/>	Washing equipment	<input type="checkbox"/>	Serving meals	<input type="checkbox"/>
Other items (may be added):	<input type="checkbox"/>			Scrubbing pots	<input type="checkbox"/>
				Office work	<input type="checkbox"/>
				Working as an office-boy	<input type="checkbox"/>
				Gardening	<input type="checkbox"/>
				Care	<input type="checkbox"/>
<p>Complications/medical condition:</p> <p>.....</p>					
<p>Additional comments:</p> <p>.....</p> <p>.....</p> <p>.....</p>					

APPENDIX 6

FILE FOR RECORDING JOB COACH'S WORKING HOURS AND TASKS

Job coach's first name and surname (to be selected from a list)	Job coach's PESEL	Date (YYYY-MM-DD)	Number of hours of support (HH-MM)	Work performed (to be selected from a list)	Comments

APPENDIX 7

PROFESSIONALS' MONTHLY REPORT ON COOPERATION WITH A CLIENT

Date: month/year of cooperation:

Client's first name and surname:

Type of activity:

Job coach's first name and surname:

Objective of the activity/support:

Tasks and/or problems:

.....

.....

.....

.....

Professional's responsibilities:

.....

.....

.....

APPENDIX 8

JOB ANALYSIS

Company name:

Company address:

Date and job coach's name:

1. General job-related data:

a) Working time:

weekly: _____ h. flexible

working days:

Mon Tue Wed Thu Fri Sat Sun

start time – end time:.....

special arrangements concerning working time:

breaks: breakfast: from to.....

lunch: from to.....

b) Wages:

rate:

c) Travel:

means of transportation:

2. Company structure:

Number of employees: _____ in a department: _____

Number of employees in a corporate team:

Average age in a corporate team:

Gender distribution: females: _____ males: _____

Level of qualifications in a team: low average high

Staff turnover: low average high

Comments:

3. Work environment-related data (risk factors):

Noise:

Odours:

Indoor air quality:

Room characteristics (key features):

Changeability of working environment: yes no

Presence of allergenic materials (substances):

Special work & safety measures, e.g. protective clothing:

Necessity to use tools/machines:

Work at height:

Other comments:

4. Description of daily work routine:

Time/hours:

Description:

Before work:

After work:

5. Evaluation of requirements/competencies:

Please note: “knock-out criterion” represents a requirement which, if not met by a candidate, results in his/her ineligibility from taking up a job.

5a) Physical function requirements:

Comments:

requirements	low	medium	high	knock-out criterion
standing				
sitting				
walking				
lifting				
carrying				

5b) Sensory function requirements:

Comments:

requirements	low	medium	high	knock-out criterion
vision				
hearing				
sense of smell				

5c) Motor function requirements:

Comments:

requirements	low	medium	high	knock-out criterion
gross motor skills				
fine motor skills				
hand-eye coordination				
strength				

5d) Social interaction requirements:

Comments:

requirements	low	medium	high	knock-out criterion
isolation				
group				
clients				

5e) Learning ability requirements:

Comments:

requirements	low	medium	high	knock-out criterion
reading				
writing				
counting				
perception				
time orientation				
speech				
communication via pictograms				
computer skills				

5f) Requirements concerning pace of work:

Comments:

requirements	low	medium	high	knock-out criterion
pace				

5g) Mental resilience requirements:

Comments:

requirements	low	medium	high	knock-out criterion
resistance to stress				
ability to make decisions				
motivation				
flexibility				

requirements	low	medium	high	knock-out criterion
patience				
acting with confidence (diligence, self-control)				

6. Is it possible to adapt a workplace to a client’s individual needs and specific capabilities?

with regard to working time

.....

with regard to daily work routine

.....

with regard to technical assistive devices

.....

with regard to the organisation of the workplace

.....

Comments:

7. Contact person:

a) surname and function:

comments:

b) surname and function:

comments:

APPENDIX 9

COOPERATION AGREEMENT WITH EMPLOYER

concluded in on (date)between:

.....

represented by:

.....

hereinafter referred to as “the organisation” and

.....

represented by

.....

hereinafter referred to as “the employer”.

§ 1

The subject matter of this agreement is the implementation of activities related to supported employment of persons with disabilities, to be carried out by both parties to this agreement.

§ 2

In view of the implementation of supported employment-related activities, the organisation shall delegate its employees (job coaches) to work on the employer’s site:

1.....

2.....

in order to coach and monitor the work of persons with disabilities.

§ 3

The scope of responsibilities of the delegated organisation’s employees is specified in the annex to this agreement.

§ 4

Two identical copies of the contract have been prepared, one for each of the parties.

Signed on behalf of the employer:

Signed on behalf of the organisation:

.....

.....

APPENDIX 10

ASSESSMENT FILE FOR COOPERATION BETWEEN JOB COACH AND CLIENT

Client's first name and surname

Job coach's first name and surname

Date

1. How do you rate your cooperation with your job coach?

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
good	satisfactory	dissatisfactory	hard to say

2. What form of support provided by your job coach appealed to you most?

- assistance in defining vocational preferences
- assistance in identification of skills/capabilities
- finding an adequate job offer/workplace
- support in preparation of application documents
- support in preparation for a job interview
- support during a job interview
- assistance in making a decision on starting a job
- helping with formalities associated with starting a job (e.g. defining terms of employment)
- on-the-job training in a workplace
- ongoing monitoring during employment
- other items (may be added)

3. How do you rate frequency of your contact with your job coach?

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
too frequent	adequate	too rare	hard to say

4. Do you think that the scope/forms of cooperation with your job coach should change?
If so, what changes would you suggest?

.....

5. Additional comments/suggestions:

.....

APPENDIX 11

ASSESSMENT FILE FOR COOPERATION BETWEEN JOB COACH AND EMPLOYER

Name of company/entity

First name and surname of the company's/
entity's representative

Job coach's first name and surname.....

Date

1. How do you rate cooperation between your firm and the job coach?

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
good	satisfactory	dissatisfactory	hard to say

2. How do you rate the frequency of contact with the job coach?

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
satisfactory	correct	dissatisfactory	hard to say

3. How do you rate the scope of information provided by the job coach during the process of employee recruitment?

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
satisfactory	correct	dissatisfactory	hard to say

4. How do you rate the support provided by the job coach to the employee during the process of recruitment?

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
satisfactory	correct	dissatisfactory	hard to say

5. How do you rate the support provided by the job coach to the employee with regard to the performance of work duties?

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
satisfactory	correct	dissatisfactory	hard to say

6. How do you rate the purposefulness of the support provided by the job coach in the process of vocational development and during the process of work?

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
highly	moderate	low	hard to say

7. What type of support provided by the job coach appealed to you most?

- personnel consulting
- job matching for a person with disabilities, including a job description
- on-the-job training for an employee with disabilities
- prior to employment, expressing commitment to providing constant support to an employee with disabilities
- helping with formalities associated with the employment of a person with disabilities
- assistance in claiming allowances due to the employment of a person with disabilities
- ongoing monitoring of an employee with disabilities
- other items (may be added).....

8. Do you think that the scope/forms of cooperation between the job coach and your firm should change? If so, what changes would you suggest?

.....
.....

9. Additional comments/suggestions:

.....
.....

APPENDIX 12

User's Manual for the Electronic Monitoring System (EMS)

The Electronic Monitoring System (EMS) is an online tool for mentors, managers and other professionals who register their activities performed for clients of supported employment programmes.

The application can be accessed through a website.

In order to access the system, you will need to use your login and password that you have received from your coordinator/mentor.

1. A coordinator's account is set up by a system administrator.
2. A coordinator registers teams and provides team mentors with access data.
3. Mentors register professionals (i.e. create professionals' accounts) using the following data:
 - a) name and surname,
 - b) PESEL – Personal Identification Number,
 - c) job position (job coach, vocational counsellor, psychologist, other),
 - d) form of employment, part-time or full-time, term of employment.

Every user has access to the app at a different level of functionality.

I. Functionalities accessible from professionals' accounts

The system's professional account screen contains the following tabs:

- a) Participants tab
 - this tab is for adding participant information sheets (in order to add a participant, use the “add participant” option, then the system will redirect you to a personal information sheet with blank fields that need to be filled in),
 - every user has his/her tab consisting of 4 sub-tabs; the function of the tabs is to facilitate the gathering of the most important information about a participant and the support she/he has received.

b) Employers tab

- is for recording contact with employers,
- is for recording information about terms of agreements signed with employers,
- facilitates recording information resulting from job position analysis.

c) The organiser tab

- is for planning the tasks of a professional,
- facilitates registration of significant events (from the professional's perspective),
- includes a calendar,
- facilitates recording contact,
- includes a notepad (this enables a professional to record important data and information),
- is only accessible to a professional (an authorised user).

d) Worksheet tab

- the tab facilitates the generation of worksheets and the forwarding of worksheets to mentors for approval,
- it also makes it possible to browse worksheets and check their status (rejected, filed, approved), as well as dates of submission and comments,
- in order to view a worksheet you must click "view" and the worksheet file will be generated.

e) Record of working time tab

- this function is for registering all activities performed by the professional.

f) My account tab

- possibility to change your password.

Project participants are added by a job coach through the "**participants**" tab by clicking on "**add a participant**"; subsequently, the relevant worksheet pops up and needs to be filled in.

a) **Registration must take place on the day a participant is recruited or on the following day at the latest.**

b) All empty fields in the worksheet must be filled in. After completing the worksheet the participant is registered in the system's database.

c) **At the stage of recruitment the system displays a basic sub-tab (“personal data sheet”) that contains the following data:**

- **personal data,**
- **PESEL – Personal Identification Number,**
- **address of residence,**
- **contact data.**

The data is entered into the system in order to facilitate selection of a participant from a list of participants and also registration of activities for the given participant.

After the person has qualified for the given programme, tick “qualified” and the system will enable you to edit the remaining data from the personal data sheet (*full description of the tab can be found below*).

1. “Participants” tab consists of four sub-tabs:

a) sub-tab 1: personal data sheet

- **personal data of the selected participant (first name, surname, PESEL – Personal Identification Number – age and gender are generated automatically),**
- **address of residence**
 - **select from: urban area /city size/ rural area, region, municipality,**
 - **enter address (town/city, street, house number, flat number, postal code),**
 - **participant’s telephone number,**
 - **participant’s e-mail address,**
 - **enter the participant’s contact data / family’s contact data;**
- **disability**
 - **degree (select from the list: mild, moderate, severe),**
 - **type (select from the list in accordance with the binding legislation; enter all types as appropriate and in line with the participant’s updated disability certificate);**
- **education level**
 - **select from the drop-down list: no education, basic/primary, junior secondary, secondary, tertiary/higher,**
 - **each level can also be broken down further to reflect more details;**
- **participation in activities organised by support centres for persons with disabilities**

- select from the list: current participant, ex-participant, n/a;
- for participants and ex-participants you must enter the type of centre and duration of programme;
- job market status
 - select from the list: unemployed, long-term unemployed, jobseeker, vocationally inactive;
- professional experience
 - select from: open/sheltered labour market (enter years of experience),
 - it is possible to tick both options or enter “no professional experience”;
- social benefits: no benefits, (recipient of) allowance, (recipient of) benefits,
- incapacitation
 - select from list: no incapacitation, partial incapacitation, full incapacitation;

b) sub-tab 2: participant sheet

- date of recruitment to the programme
 - enter recruitment date;
- date of programme termination and reason for termination
 - termination as planned,
 - resignation (early termination);
- date of return to the programme,
- enter return date;

c) sub-tab 3: practical activities sheet

- job placement – term of agreement, job position, employer’s name,
- traineeship – term of agreement, job position, employer’s name,
- “job samples” – dates, hours, job position, employer’s name,
- volunteering – term of agreement, job position, employer’s name,
- employment – term & type of contract (full-time, task-based, part-time), job position, employer’s name,
- employers are selected from a drop-down list that contains all employers added through the “Employer” tab by all team members;

d) sub-tab 4: support sheet

- vocational profile,
- monthly report by the job coach: a qualitative description of the participant's functioning, with an account of problems and difficulties encountered in the coach's daily work,
- support – information on support type and number of hours of support – data generated from the registry of professionals (in the case of direct support).

2. “Employers” tab contains the following:**a) sub-tab 1: workplace data sheet – enter the following data:**

- workplace name,
- workplace address,
- KRS (National Court Registry) number,
- workplace size (select from drop-down list: micro, small, medium-sized, large enterprise),
- industry (select from list),
- sector (1, 2 or 3),
- contact person (telephone no., e-mail address);

b) sub-tab 2: job position analysis;**c) sub-tab 3: register of co-operation agreements signed with employers including term/duration of agreement.****3. “Organiser” tab is a planning tool and it includes the following:**

- calendar (with the functionality of adding planned activities),
- contact list (possibility to enter contact data),
- notepad (possibility to enter and record notes).

4. “Working time sheet” tab is for registering the support provided to the participant.

- a) After clicking on the tab, a list of tasks and activities will appear; to add a new element to the list, click **“add a new activity”**; subsequently, a new screen will load

with the possibility of adding activities (“**record of professional’s activities: add an activity**”).

- b) “**Record of professional’s activities: add an activity**” facilitates the recording of a performed support activity; the professional who enters the data can choose from a few options:

Select from the drop-down list of types of support delivered by the professional:

- **direct support**

- selection of a supported employment stage,
- selection of support form,
- select the relevant participant from drop-down list of participants,
- select dates,
- activity duration;

- **indirect support**

- select the relevant type of work from the drop-down list,
- select dates,
- activity duration (from – to).

REGISTER OF SUPPORT FORMS

Direct support (i.e. support activities implemented in direct collaboration with the participant):

stage I – engagement:

- recruitment meeting,
- introduction of a job coach and client, presentation of SE programme,
- gathering basic candidate data and information,
- developing and concluding a contract with the client;

stage II – vocational profiling:

- recognition of preferences and professional skills of a client,
- diagnosis of the level of social skills,

- support in the organisation of “job samples”,
- support during “job samples”,
- group workshops:
 - enter workshop subject,
 - select the participant(s) who took part in the workshop,
 - select from the list of professionals the professionals who conducted the workshop;
- preparation of Individual Career Plans and Action Plans,
- individual sessions with clients,
- communications training,
- direct contact with employers,
- other – specify
 - in order to enter a new activity you must contact the programme’s coordinator who will add a new category of activities to the system. Subsequently, all users will be able to access the new category;

stage III – job finding:

- supporting the disabled person in the process of drafting his/her CV and/or cover letter,
- active job seeking,
- identification of potential vacancies,
- support in the organisation of practices,
- support in the implementation of practices,
- support in dealing with formalities associated with job placements,
- support in the implementation of placements,
- individual sessions with clients,
- communications training,
- group workshops:
 - enter workshop subject,
 - select the participant(s) who took part in the workshop,

- select from the list of professionals the professionals who conducted the workshop;
- direct contact with employers,
- other – specify
 - in order to enter a new activity you must contact the programme's coordinator, who will add a new category of activities to the system; subsequently, all users will be able to access the new category;

stage IV – employer engagement:

- individual sessions with clients,
- communications training,
- direct contact with employers,
- showing the job position and environment to the client,
- support in the preparation of the client for a job interview,
- organisation of a trilateral meeting (candidate, job coach, employer),
- support for clients and employers in dealing with employment procedures,
- preparation of employers and co-workers for cooperation with the disabled client,
- employment (signing an employment contract with the employer),
- group workshops:
 - enter workshop subject,
 - select the participant(s) who took part in the workshop,
 - select from the list of professionals the professionals who conducted the workshop;
- other – specify
 - in order to enter a new activity you must contact the programme's coordinator, who will add a new category of activities to the system. Subsequently, all users will be able to access the new category;

stage V – on and off the job support:

- supporting the disabled client in all formal issues,
- supporting the disabled client in the performance of their duties at work,
- on the job training,
- supplementary or intervention training,

- job monitoring in collaboration with the employer,
- periodic evaluation,
- coaching support and social support in the workplace,
- off the job support,
- communications training,
- support group:
 - enter support group session subject,
 - select the participant(s) who took part in the workshop,
 - select from the list of professionals the professionals who conducted the workshop;
- other – specify
 - in order to enter a new activity you must contact the programme's coordinator, who will add a new category of activities to the system; subsequently, all users will be able to access the new category.

Indirect support (not based on direct collaboration with a participant):

1. meetings of teams of job coaches, including coaching sessions,
2. training courses to improve the level of knowledge of professionals,
3. meetings with managers,
4. consultations among team members.
5. consultations with other professionals – select from the drop down list: psychologist, psychiatrist, vocational counsellor, job coach, other – specify,
6. information and promotion – select from the drop-down list:
 - meeting at an NGO, e.g. foundation,
 - meeting at a job centre,
 - meeting at an occupational therapy workshop,
 - meeting at a community self-help home,
 - meeting at a social care home,
 - meeting at a support centre for disabled persons,

- meeting with the person with disability,
 - meeting with the family or environment of the person,
 - distribution of leaflets,
 - promotion of the programme through electronic mail and via telephone,
 - other – specify;
7. business travel,
8. working with documentation,
9. organisation practical activities – select the relevant type of activity from the drop-down list: “job samples”, placements, practices,
10. job market analysis – select from the drop-down list:
- direct contact with employer,
 - telephone/e-mail contacts with employer,
 - analysis of press/Internet-based job advertisements,
 - creation of database of employers,
 - other – specify;
11. contact with other entities on the labour market (enter type of entity),
12. other activities; in order to enter a new activity you must contact the programme’s coordinator, who will add a new category of activities to the system; subsequently, all users will be able to access the new category.

After registering an activity the activity is added to the list of activities performed by job coaches and then generated in the working time sheet.

5. “Working time sheet” tab:

- this tab includes two functionalities:
 - submit the sheet (submission of the sheet to a mentor for approval);
 - view submitted sheets (list of sheets filed with their status, possibility to generate and view printable versions of the sheets).

6. “My account” tab:

- this offers you the possibility to change your password.

II. Mentor's account functionalities

Tabs:

1. List of users

- a) add a new account for a new user (professional),
- b) view all users on the mentor's team, divided into the following data groups:
 - name (user's account name),
 - type of user (administrator, coordinator, job coach coordinator, mentor, professional),
 - user's name and surname,
 - user's e-mail address,
 - functionalities: edit an account, send an e-mail, delete account.

2. Professionals

- a) list of professionals on the team,
- b) the data is presented in a table in the following sequence:
 - name and surname,
 - PESEL – Personal Identification Number,
 - job position/role,
 - term of employment,
 - team,
 - 4 sub-tabs (operations):
 - **sub-tab 1: personal data sheet (editable)**
 - ◇ name and surname,
 - ◇ PESEL – Personal Identification Number,
 - ◇ job position (job coach, vocational counsellor, psychologist, other),
 - ◇ type of employment relationship,
 - ◇ term of employment,
 - ◇ part-time/full-time,
 - ◇ number of days of holiday/leave,
 - ◇ contract number,

- ◊ mentor's name and surname (automatically generated by the system);
- **sub-tab 2: participants** – list of names of participants supported by a given professional with access to all data from the tab; the system will automatically provide the number of participants and their status (current, interrupted programme, completed programme);
- **sub-tab 3: record of working time**
 - ◊ list of activities registered by a given professional with the possibility to filter for direct and indirect support,
 - ◊ month selection function;
- **sub-tab 4: worksheets**
 - ◊ this functionality makes it possible to browse worksheets and check their status (rejected, filed, approved), date of submission, comments,
 - ◊ in order to see a worksheet you must click “view” and the worksheet file will be generated.

3. Participants

- a) list of participant in a given team,
- b) the system will automatically provide the number of participants and their status (current, interrupted programme, completed programme),
- c) the data is presented in a table (name, surname, PESEL – Personal Identification Number, status, team) and can be filtered,
- d) **view sub-tabs functionality (operations):**
 - personal data sheet,
 - participation sheet,
 - practical activities sheet,
 - support sheet,
 - assignment of a different professional (possibility to change a participant's job coach in the system).

4. Employers

- a) list of all employers across all teams,
- b) the data is presented in a table with the following accompanying information: name, place, agreement (term/duration), team name, preview of a given employer's tab.

5. Reports (in order to generate a report please select the duration and apply a filter: job coach/coaches, form/s of support, participant/s)

- a) the report “Participants of supported employment programme”,
- b) quantitative report of practical activities performed,
- c) report for support activities (time and area of support),
- d) report of work activities of a professional:
 - general,
 - direct support,
 - indirect support;
- e) register of agreements.

6. Worksheets

- this functionality makes it possible to browse worksheets and check their status (rejected, filed, approved),
- it is possible to find all sheets of a given job coach through the job coach’s name, surname, PESEL – Personal Identification Number and through the worksheet ID,
- in order to see a worksheet you must click “view” and the relevant worksheet file will be generated,
- it is possible to approve or reject worksheets (reason for rejection must be provided).

7. My account

- this offers you the possibility to change your password.

III. Functionalities of the account of job coach coordinators

Tabs:

1. List of users

- a) add a new account for a new user (mentor),
- b) add a new team – in order to add a new team, add a new mentor and enter team name,
- c) view all users coordinated by the coordinator, divided into the following data groups:
 - name (user’s account name),

- type of user (administrator, coordinator, job coach coordinator, mentor, professional),
- user's name and surname,
- user's e-mail address,
- functionalities – edit an account, send an e-mail, delete account.

2. Professionals

- a) list of professionals, filtering option (filtering by mentors, mentor selection = team selection),
- b) the data is presented in a table in the following sequence:
 - name and surname,
 - PESEL – Personal Identification Number,
 - job position/role,
 - term of employment,
 - team,
 - 4 sub-tabs (operations):
 - **sub-tab 1: Personal data sheet**
 - ◇ name and surname,
 - ◇ PESEL – Personal Identification Number,
 - ◇ job position (job coach, vocational counsellor, psychologist, other),
 - ◇ type of employment relationship,
 - ◇ term of employment,
 - ◇ part-time/full-time,
 - ◇ amount of days of holiday/leave,
 - ◇ contract number,
 - ◇ mentor's name and surname;
 - **sub-tab 2: participants** – list of names of participants supported by a given professional with access to all data from the tab; the system will automatically provide the number of participants and their status (current, interrupted programme, completed programme);

◦ **sub-tab 3: record of working time**

- ◇ list of activities registered by a given professional with a possibility to filter for direct and indirect support,
- ◇ month selection function;

◦ **sub-tab 4: worksheets**

- ◇ this functionality makes it possible to browse worksheets and check their status (rejected, filed, approved), date of submission, comments,
- ◇ possibility to delete an approved worksheet; new approval by a mentor must follow,
- ◇ in order to see a worksheet you must click “view” and the relevant worksheet file will be generated.

3. Participants

- a) list of participants from all teams,
- b) the system will automatically provide the number of participants and their status (current, interrupted programme, completed programme),
- c) the data is presented in a table (name, surname, PESEL – Personal Identification Number, status, team) and can be filtered.

4. Employers

- a) list of all employers across all teams,
- b) data is presented in a table with the following information: name, place, agreement (term/duration), team name, preview of a given employer’s tab.

5. Reports (in order to generate a report please select the duration and apply a filter: job coach/coaches, form/s of support, participant/s)

- a) the report “Participants of support employment programme”,
- b) quantitative report of practical activities performed,
- c) report for support activities (time and area of support),
- d) report of work activities of a professional:
 - general,
 - direct support,
 - indirect support;
- e) register of agreements.

6. Worksheets

- this functionality makes it possible to browse worksheets and check their status (rejected, filed, approved),
- it is possible to find all sheets of a given job coach through the job coach's name, surname, PESEL – Personal Identification Number and through worksheet ID,
- in order to see a worksheet you must click on “view” and the relevant worksheet file will be generated,
- it is possible to approve or reject worksheets (reason for rejection must be provided),
- it is possible to reject worksheets approved by mentors,
- it is possible to delete worksheets approved by yourself.

7. My account

- this offers you the possibility to change your password.

IV. Coordinator's account functionalities

Tabs:

1. List of users

- a) new users can be added (“add a new user”),
- b) new teams can be added - in order to add a new team first add a new account of a job coach coordinator and then add mentor's account (when a mentor's account is added, new teams are added, as well as coordinators who will be attached to the teams),
- c) view all users recorded in the system divided according to the following data groups:
 - name (user's account name),
 - type of user (administrator, coordinator, job coach coordinator, mentor, professional),
 - user's name and surname,
 - user's e-mail address,
 - functionalities: edit an account, send an e-mail, delete account.

2. Professionals

- a) list of professionals, filtering option (filtering by professionals coordinated by a given coordinator and by mentors - selection of all professionals from a given team),

b) the data is presented in a table in the following sequence:

- name and surname,
- PESEL – Personal Identification Number,
- job position/role,
- term of employment,
- team,
- 4 sub-tabs (operations):
 - **sub-tab 1: personal data sheet (editable)**
 - ◇ name and surname,
 - ◇ PESEL - Personal Identification Number,
 - ◇ job position (job coach, vocational counsellor, psychologist, other),
 - ◇ form of employment, part-time or full-time, term of employment, amount of days of leave/holiday;
 - **sub-tab 2: participants** – list of names of participants supported by a given professional with access to all data from the tab; the system will automatically provide the number of participants and their status (current, interrupted programme, completed programme);
 - **sub-tab 3: record of working time**
 - ◇ list of activities registered by a given professional with a possibility to filter for direct and indirect support,
 - ◇ month selection function,
 - ◇ from direct support data is generated to sub-tab “support” in the “participants” tab;
 - **sub-tab 4: worksheets**
 - ◇ this functionality makes it possible to browse worksheets and check their status (rejected, filed, approved), date of submission, comments,
 - ◇ possibility to delete an approved worksheet; new approval by mentor and coordinator must follow,
 - ◇ in order to view a worksheet you must click “view” and the relevant worksheet file will be generated.

3. Participants

a) list of participants from all teams,

- b) the system will automatically provide the number of participants and their status (current, interrupted programme, completed programme),
- c) the data is presented in a table (name, surname, PESEL – Personal Identification Number, status, team) and can be filtered.

4. Employers

- a) list of all employers across all teams,
- b) the data is presented in a table with the following data: name, place, agreement (term/duration), team, preview of a given employer's tabs.

5. Teams

- a) list of all teams registered in the system,
- b) names of teams and mentors who manage particular teams.

6. Reports

- a) the report “Participants of supported employment programme”,
- b) quantitative report of practical activities performed,
- c) report for support activities (time and area of support),
- d) report of work activities of a professional:
 - general,
 - direct support
 - indirect support;
- e) register of agreements.

7. Administration

- adding new (other) information:
 - a) forms of support:
 - direct support,
 - indirect support;
 - b) position.

8. My account

- this offers you the possibility to change your password.

HELP / SUPPORT FOR USERS

The support function helps users of the application solve any problems associated with the application; support is provided via telephone, e-mail or by other means of communication.

Telephone and e-mail support will be available from Monday to Friday, 8 a.m. to 9 p.m. and will be provided by an external system administrator (contractor).