

Academic and Career Plan and Individual Service Strategy

SECTION I: Identification

Customer Name

Name: Pat Smith

Last Four Digits SSN: 1234

SECTION II: Informational Interview

Purpose for Visit

I want to get a job in the medical field.

Educational Background

I completed half of grade 12 and need a GED.

Work History

Cashier and cook at McDonalds for 5 years (part time). Part time at Walmart stocking shelves for about 8 months.

Career Interests

I want to work as a Physician Assistant and know that I have to further my education to do so.

Needs and Barriers

Single parent of 3 young children so I need a flexible schedule.

Transportation- relies on public transportation and rides

Track

Job-to-training-job

Next Steps

Take all three assessments on ICE and the TABE prior to meeting next with week with the ACC.

Comment [s1]: Completed by Case Manager-SRM

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SECTION III: Employment Plan

Field of Interest

Career Goal:

Strengths and Weaknesses

Strength: (drop down)

- Transferable Skills
- Credentials
- Education
- Work Experience

Notes:

Weakness:

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Needs and Barriers

Needs and Barriers-1: (drop down)

- Impairment (Physical, Mental, Learning)
- Receives Public Assistance
- Low Income
- Displaced Homemaker
- Single Parent
- Lack of Transferable Skills
- Deficient in Basic Literacy Skills
- Limited English Proficiency
- School Dropout/ Poor Work Experience
- Substance Abuse
- Older Worker
- Childcare Required
- Poor/No transportation
- Unemployed/ Underemployed
- Veteran with significant barrier to employment
- Other barriers not identified
- Pregnant and Parenting Youth
- Homeless/Runaway /Foster Child
- Requires add'l assistance to complete ed prgm
- Requires add'l assistance to secure and hold employment

Plan For Overcoming Identified Needs and Barriers:

Action Step:

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Employment Goals

Work History:

Employer (1)

Dates of Employment:

Position Held

Responsibilities

Employer (2)

Dates of Employment:

Position Held

Responsibilities

Long Term Employment Goal:

Short Term Employment Goal:

Job Search Strategy:

Notes:

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Education Goals

Long-Term Education Goal:

Short-Term Education Goal:

Strategy for Achievement:

.

Notes:

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Goals and Interests

(1) **Date Set:**

Goal Type:

- | | | |
|---|--|---------------------------------------|
| <input type="checkbox"/> Basic Skills | <input type="checkbox"/> Self Sufficiency Goal | <input type="checkbox"/> H.S. Diploma |
| <input type="checkbox"/> Family Goal | <input type="checkbox"/> Training Goal | <input type="checkbox"/> Career |
| <input type="checkbox"/> GED Goal | <input type="checkbox"/> Work Readiness Goal | |
| <input type="checkbox"/> Lifestyle Goal | | |

Description:

Action Step:

Action Step:

Action Step:

Action Step:

Status: (drop down)

- | | | |
|-----------------------------------|---|---|
| <input type="checkbox"/> Attained | <input type="checkbox"/> Set but Attainment pending | <input type="checkbox"/> Set but Unattained |
|-----------------------------------|---|---|

Planned Date of Attainment:

Date of Attainment:

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Training Plan

Co-Enrolled in Adult Education: (Drop down)

- Yes
- No

Co-Enrolled in WIA Adult/Youth: (Drop down)

- Yes
- No

Occupational Skills Needs:

Date Drug Test Administered:

Results: Pass/Fail: (Drop down)

- Pass
- Fail

Enrollment Date:

Training Provider:

Training Provider ID:

Training Program:

Training Program ID:

Completion Date:

Career Certification Program: (Drop down)

- Yes
- No

Adult Education/Remediation Needs:

Assistive Technology Needs for Persons with Disabilities for Attaining Career Goals:

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Required Supportive Services During Active Participation:

Post Employment Needs:

Notes:

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SECTION V: Financial Plan

Educational Grants

ITA Issued:

Begin Date:

End Date:

Amount:

Demand Occupation (O*NET-SOC):

Pell Grant Issued:

Begin Date:

End Date:

Amount:

Other Grants/Scholarships:

Begin Date:

End Date:

Amount:

Customer Contribution:

Total Funds Available:

Program Cost:

Balance of Funds Less Program Cost:

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SECTION VI: REA

Reemployment and Eligibility Assessment

Is Customer Enrolled in REA:

Is Signed Individual Reemployment Program Agreement on File:

SECTION VII: Testing Information

Testing Information

COMPASS

Test Date:

Scores: Reading Writing Math

Pass/Fail: (Drop down)

- Pass
- Fail

Notes:

Accuplacer

Test Date:

Scores: Reading Writing Math

Pass/Fail: (Drop down)

- Pass
- Fail

Notes:

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Indiana Career Explorer

Assessment Date: 9/1/11

Kuder Career Search With Person Match:

Top 3 Career Clusters-Human Services/ Health Services/ Hospitality and Tourism

Kuder Skills Assessment:

Top 3 Career Clusters- Marketing/ Transportation, Distribution and Logistics/ Hospitality and Tourism

Kuder Work Values Inventory:

Top 3 Values: Workplace/ Lifestyle/ Challenge

Notes:

Comment [s2]: Completed by Case Manager, SRM, prior to being referred to ACC

Worldwide Interactive Network (WIN)

Assessment Date:

Test Code: (drop down)

Pre Test Post Test Locator

Level: (drop down)

1 2 3 4 5 6

Test Score – Percentile: Applied Math Applied Technology Listening Locating
Information Observation Reading for Information Team Work Writing Business
Writing Work Habits

Notes:

Work Keys

Assessment Date:

Test Score: Reading for Information Applied Mathematics Locating Information

Does Customer Meet Minimum Qualifications for Profiled Job: (drop down)

Yes No n/a

Basic Skills Deficient: (drop down)

Yes No

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Notes:

Other Assessment

Assessment Date:

Form: (drop down)

- CASAS Other

Test Score - Raw:

Test Score – Scaled:

Test Score – Grade Equivalent:

Basic Skills Deficient: (drop down)

- Yes No

Notes:

TABE

Assessment Date: 9/15/11

Test Code: Pre-Test

Series: 9

Level: D

Test Score – Raw: Applied Math- Math Computation-

Test Score – Scaled: Applied Math- Math Computation-

Test Score – Grade Equivalent: Applied Math- 10.9 Math Computation- 9.6

Basic Skills Deficient: (drop down)

- Yes No

Notes:

Comment [s3]: Completed by Case Manager prior to being referred to ACC

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Assessment Date: 9/15/11

Test Code: Pre Test

Series: 9

Level: A

Test Score – Raw: Reading-

Test Score – Scaled: Reading-

Test Score – Grade Equivalent: Reading- 12.1

Basic Skills Deficient: (drop down)

Yes

No

Comment [s4]: Completed by Case Manager prior to being referred to ACC

Notes:

TABE CLAS-E

Assessment Date:

Test Code: (drop down)

Pre test

Post test

Locator

Level/Form:

Test Score – Raw: Reading Listening Writing Speaking

Test Score – Scaled: Reading Listening Writing Speaking

Test Score – Grade Equivalent: Reading Listening Writing Speaking

Notes:

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SECTION VIII: Customer Commitment

Customer Agreement

I agree to follow the academic and career plan by working toward the achievements of the goals outlined above. I will attend classes/workshops, complete my assignments, ask for help when I need it, and make a genuine effort to achieve my goals. If changes need to be made to my academic and career plan, my case manager and I will make a new agreement.

Customer's Signature: _____ Date: _____

Case Manager's Agreement:

As the customer's case manager, I will do everything possible to help the customer achieve the above goals by providing appropriate guidance and by reviewing the customer's progress at regular intervals. I understand that if changes need to be made in the academic and career plan, the customer and I will make a new agreement.

Case Manager's Signature: _____ Date: _____

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SECTION IX: Progress and Review

Check In

CASE NOTE

Date:

Type: (drop down)

Phone

Face to face

Email

Notes:

CASE NOTE

Date:

Type: (drop down)

Phone

Face to face

Email

Notes:

CASE NOTE

Date:

Type: (drop down)

Phone

Face to face

Email

Notes:

CASE NOTE

Date:

Type: (drop down)

Phone

Face to face

Email

Notes: