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Practice Perspective

Using Checklists as a Vocational Rehabilitation Tool for Employed Consumers

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The responsibilities of rehabilitation counselors can be overwhelming. Rising caseload sizes, high turnover rates, policy changes, and new legislation can cause duties to increase over time. Such added requirements may reduce rehabilitation counselors' ability to aid consumers in achieving their maximum potential. Therefore, it is essential to explore tools and techniques that may assist them with managing ever-evolving duties. One simple tool I have used is a checklist.

General Use of Checklists

Of course, checklists are not new or unique concepts. They may be used in personal contexts such as keeping track of groceries needed and chores to be completed. They may also be used professionally. I created task-specific checklists in my previous role as a state rehabilitation counselor. For example, I listed the steps necessary to assist consumers with applying for a position. Such a list might include:

- contact employer to verify that the position is unfilled
- ensure job applicant understands position requirements
- review the job applicant's updated résumé
- verify that the job applicant's references are reliable

I would usually use abbreviations and incomplete sentences for items on my checklists to save time. For example, I might write, "Refs reliable?" for bullet point four. After initial meetings with job applicants who are receiving vocational rehabilitation services, I created lists of services that they may benefit from. Such lists could include:

- vocational evaluation
- assistive technology assessment
- counseling and guidance
- job coach

Similar to checklists, I have kept to-do lists to keep track of daily tasks such as telephone calls to return, medical records to follow up on, and businesses to research for business development. In addition to informal checklists, I used formal, agency-established electronic or printed checklists. Both formal and informal checklists were helpful to ensure that tasks were completed, considerations were assessed, and regulations were applied without having to rely solely on my memory.

Job Retention and Career Advancement Checklists

The Workforce Innovation and Opportunity Act (WIOA) highlights the need for vocational rehabilitation programs to provide services that support consumers in maintaining their jobs (job retention) or advancing in their careers (career advancement). With almost one-third of consumers with blindness and low vision employed at the time of application for vocational rehabilitation services, a higher rate than other consumers (Crudden, McDonnall, & Sui, 2018), job retention and career advancement are essential. As part of an agency training session about job retention and career advancement, I created checklists to help participants assess the job retention and career advancement needs of people with blindness or low vision. The checklists are primarily based on my own personal experiences as a rehabilitation counselor and career counselor assisting consumers with various disabilities to retain and advance in their careers. However, I also utilized knowledge gained from the National Institute on Disability, Independent Living, and Rehabilitation Research (NIDILRR) funded research project: Job Retention and Advancement: A Mixed Methods Investigation, led by Adele Crudden, from which the training was derived (see also Crudden & Steverson, 2018).

The job retention checklist is designed to assess employed consumers who are blind or have low vision who may be having difficulty maintaining their jobs. It poses questions that

prompt conversations about job challenges, the social and financial implications of job loss, and supports that people with visual impairments need in the workplace. These questions may help reveal the need for job retention to prevent job loss. The career advancement checklist is designed to assess if an employed consumer with blindness or low vision may benefit from vocational rehabilitation services to help them achieve better pay and a higher-level position that requires advanced skills. It includes questions that prompt counselors to inquire about job satisfaction, mentorship, income requirements, and motivation to work. These questions are intended to get both the consumer and counselor to think more deeply about career advancement and its potential impact.

Format of Checklists

Structured similarly, the job retention checklist has 17 questions, and the career advancement checklist has 18 questions. Each checklist has an introductory statement that explains the purpose of the document. There are designated spaces at the top of the checklists for a consumer's name and the date. The bottom of each form contains a spot for the counselor or other rehabilitation professional to put their name and the date the document was completed. The far-left column has questions to consider. In the subsequent three columns, counselors check *yes*, *no*, or *N/A* to answer the corresponding question. The final column provides space to provide further details about the consumer's response or ideas counselors think will be helpful to support the consumer. The first three questions determine if it is necessary to complete each checklist. The other questions further explore consumers' job retention or career advancement needs. Available in a variety of formats, counselors can add additional questions and include more content in the explanation boxes. Both checklists can be found on the website of the National Technical Assistance Center on Blindness & Low Vision (n.d.) at Mississippi State University.

Recommendations for Use

Using the job retention or career advancement checklists to assess all consumers who are employed during intake can ensure that the assessment of job retention and career advancement is consistent amongst consumers. Instead of handing the checklists to consumers to complete, counselors can utilize the checklists to conduct a conversational interview. By using their counseling skills to ask open-ended questions, counselors can gain additional helpful information and strengthen rapport. For example, the first question on both checklists is: Is the consumer satisfied with their job? Instead of asking it exactly how it is listed, the counselor can obtain the information by asking several open-ended questions: "How do you feel about your job?" "What about your job satisfies you?" "What do you dislike about your job?" After exploring those questions, they can ask, "Considering what we discussed, would you say that you are satisfied with your job?" Used as an assessment tool, the checklists may help ensure consumers receive the necessary support to meet their job retention or career advancement goals. Rehabilitation counselors can place the content of the checklists into a case note, or the hardcopy can be placed into a consumer's file as evidence that there was an assessment of job retention and career advancement.

Conclusion

Although informal checklists are common for personal and professional use, formal checklists may help rehabilitation counselors in various ways to keep up with their responsibilities and their ever-changing, demanding roles. Luckily, there are resources available for them to explore that may help them perform their jobs more effectively and, in turn, have a positive impact on those they serve. The job retention checklist and the career advancement checklist are two of those resources.

References

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Table 1. Sample Questions from the Job Retention Checklist.

Is the consumer having specific challenges that may result in job loss?
Are there other services, resources, and supports that can aid the consumer with retaining their job? Would the consumer benefit from any resources to help with job retention?
Does the consumer have resources in place to help with job retention?
Does the consumer believe their employer is committed to their job retention effort?

Table 2. Sample Questions from the Career Advancement Checklist.

Is the consumer interested in gaining a higher-paying job with their current employer?
Has the consumer done any research on how they can advance in their career?
Does the consumer have a long-range career goal? If so, is it realistic given their strengths, abilities, interests, and preferences?
Can the consumer pursue their career goal while employed, or will they need to stop working to acquire additional education, training, or experience?