



## Applicant Intake Meeting Practice Guide

The purpose of the applicant intake meeting is

1. to introduce or clarify the purpose of the American Indian Vocational Rehabilitation Services (AIVRS) Program for the applicant;
2. to exchange information necessary to determine eligibility and to identify the applicant's needs and intent to achieve an employment outcome; and
3. to establish a trusting working alliance between the Tribal Vocational Rehabilitation (TVR) Counselor and applicant.

The focus of the intake meeting should be on the applicant's unique strengths, resources, priorities, concerns, abilities, capabilities, and interests that will assist him or her in achieving and maintaining gainful employment, as well as identifying functional limitations of the disability that create a substantial impediment to employment.

### Building Rapport and Trust

#### Hospitality

TVR Counselors should consider setting up their own intake meetings so applicants recognize the Counselor's voice at their first meeting. It may be helpful for TVR Counselors to introduce themselves by what they do and not their professional title. It is often helpful to state the goal and anticipated outcome of the meeting, which may put applicants at ease and reduce anxiety. TVR Counselors should be prepared to make reasonable accommodations as needed. Keep in mind that some applicants travel long distances from isolated areas: therefore, upon an applicant's arrival, it is customary to offer water and the opportunity to use the restroom.

When rapport is established, TVR counselors should use culturally sensitive and a personalized interview approach to learn more about the applicant. The TVR Counselor should be mindful of the variety of Western and traditional lifestyles, beliefs, values, and practices that an American Indian with a disability may encounter. External factors such as an applicant living in a geographically isolated area, limited access to transportation services, absence of resources and employment opportunities, and limited education or training opportunities, may have a substantial impact on a consumer's participation in the AIVRS program.

#### Communication

TVR Counselors are encouraged to use the applicant's Tribal language when appropriate. A family member may also attend an intake meeting to assist with interpretation. TVR Counselors are encouraged to use a style of communication that matches the applicant's cultural background for improved comprehension of the information. Avoid the use of VR jargon or acronyms and avoid



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### About the Institute

The Institute for Human Development is a research and training program located on Northern Arizona University. Our program is part of a national network of University Centers for Excellence in Developmental Disabilities (UCEDD). In Arizona, we are designated as one of two Arizona University Centers on Disabilities (AzUCD).

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providing too much information during the first meeting because too much information can be overwhelming and intimidating. TVR Counselors should customize their questions based on the applicant's responses, summarize information frequently, and ask applicants to describe in their words what they understand from the information provided.

#### General tips for successful rapport-building:

- Come well prepared for meetings.
- Avoid distractions, such as phone calls or walk-in interruptions.
- Block out a sufficient amount of time to complete the intake meeting.
- Avoid rushing applicants through the intake process.
- Focus on applicants' abilities to achieve personal independence and financial self-sufficiency and identify any relevant barriers to their attainment of gainful employment.

#### **Observing the Applicant**

TVR Counselors are encouraged to be active observers, avoid interrupting the applicant, and ask open-ended questions to allow the applicant to share freely. Even when a person with a disability cannot express themselves verbally; they can provide information for the intake process and influence the planning process (body postures, eye movement, smiling, and frowns). Some behaviors may be considered culturally appropriate such as not making direct eye contact, respect for elders and not speak while the elder is speaking, and the hesitancy of an applicant to disclose personal and family information. For individuals with visual or speaking impairments use assistive technology to communicate, allow ample time for a response and be sure to clearly identify yourself. If you do not understand what an applicant has said, ask them to repeat their answer.

#### **Exchanging Information**

To accomplish the primary objective of the intake meeting, a number of things need to be shared with the applicant. Likewise, the applicant needs to communicate sufficient information and provide documentation about his or her disability.

The TVR Counselor should begin by assuring applicants that the AIVRS program guarantees confidentiality of all counseling meetings and personal documents.

#### What does the TVR Counselor communicate or provide to the applicant?

- Purpose of AIVRS
- Culturally oriented VR process (i.e., intake to successful case-closure and review the physical, mental, spiritual, emotional approach to VR service delivery)
- Applicants' rights and responsibilities
- TVR Counselor's responsibilities
- Due process and Client Assistance Program (CAP)
- At the request of the consumer, traditional healing services will be provided as described in the individualized plan for employment

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- Similar Benefits/Comparable Services
- Purpose of forms to be signed (e.g., consent for release of information, application for services)
- If available, a consumer program handbook can be provided to the applicant containing information on the AIVRS mission/ vision statements

### What does the applicant communicate or provide to the TVR Counselor?

- A signed intake/application form
- Tribal membership verification
- Verification of residency on or near a reservation
- Reasons for seeking rehabilitation services
- Vocational goals and interests
- Personal account of disability and how it is an impediment to employment
- Relevant history such as vocational/employment history, medical and psychological history, education and/or training background, and previous evaluations of applicant's disability
- Release of information with the applicant's signature to obtain medical records
- Documentation of SSI (Supplemental Security Income) or SSDI (Social Security Disability Insurance) benefits, if applicable

By the end of the intake meeting, the TVR Counselor should be able to determine if, and what, external evaluations are necessary to determine eligibility. TVR Counselors should identify the applicant's next steps and schedule the next appointment to continue the applicant's eligibility determination. Each individual's situation is unique, and it may take several weeks to determine an applicant's eligibility if information must be obtained from other sources.

### References

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### Disclaimer

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