



Discovery Staging Record Cover Sheet

Date: _____

Counselor: _____

Provider information: _____

Jobseeker: _____

The following cumulative DSR Discovery Staging Record is for
Dates of Service **from** _____ **to** _____.

This time was spent identifying information recorded in **Stage(s)** _____.

Billable Hours: _____

Authorization Code(s) _____

Discovery Staging Record

Instructions: This form is used to stage, structure, capture and record the major events of Discovery. The recorder(s) should pay particular attention to how the tasks are typically performed, any accommodations, technology, supports, or specialized training strategies that should be employed. Handwritten discovery notes should be used in the field during the discovery activity with information summarized here. **NOTE: The DSR is a flexible document, changing as situations change. Feel free to update it when needed, but be sure to insert any new/updated information into the form fields WITHOUT overwriting or erasing the original information you entered. That way the DSR will keep a record of the original activities and in chronological order, the newest changes. Here is how to insert: return to the beginning of the section where the new information will be added. Place the cursor above the existing information and type in the new date followed by the newest discovery information. The old information should stay in place. A quality DSR has more verbs than adjectives. It describes the development and observations of activities.**

Name: _____
Date started _____ Date completed: _____

Family Contacts: _____

Phone _____ - _____ ext. _____ E-mail: _____

Person(s) completing Discovery Record:

Additional Contact Information: _____

Team Members and Responsibilities:

Consultants/Experts to Contact:

Comments/Considerations:

Stage One: Home & Neighborhood Observation

This section includes "relevant" information not only from interviews and conversations but from your observations.

Who will ensure this stage is completed? _____
By what date? _____

Preliminary step: review records, files, assessments to establish current issues, cautions, training, etc., that may be of relevance:

Initial Interviews: Begin with the individual's home and/or family home (if residing there).

Recap of Information (attach field notes, pictures): _____

Observations of home, bedroom, property, belongings that seem relevant: _____

Specific chores & tasks performed at home: _____

Hobbies, Sports, Collections, Interests noticed during home visit: _____

Family/friend/community activities individual engages in and regularity: _____

Neighborhood Mapping (resources, employers, transportation options, neighbors of interest, activities, civic engagement): _____

Talents, interests, skills, and tasks observable/revealed: _____

Activities, situations, & locations that need to be avoided: _____

Stage Two: Others to be Interviewed



1. Name: _____

Relationship/role: _____

Person responsible: _____

By this date: _____

Date accomplished _____

What was learned? _____

2. Name: _____

Relationship/role: _____

Person responsible: _____

By this date: _____

Date accomplished _____

What was learned? _____

3. Name: _____

Relationship/role: _____

Person responsible: _____

By this date: _____

Date accomplished _____

What was learned? _____

4. Name: _____

Relationship/role: _____

Person responsible: _____

By this date: _____

Date accomplished _____

What was learned? _____

5. Name: _____

Relationship/role: _____

Person responsible: _____

By this date: _____

Date accomplished _____

What was learned? _____

6. Name: _____
 Relationship/role: _____
 Person responsible: _____ By this date: _____
 Date accomplished _____
 What was learned? _____

Patterns Emerging: (Tasks, Interests, Talents & Skills): _____

Request Benefits Planning Query (BPQY) from SSA:

Date Requested: _____
 Information Learned: _____
 PASS Potential (or other Work Incentives to investigate): _____

Referral for Technology Assessment (State Tech Project or other):

Considerations: Adaptations, assistive or universal technology may be helpful in clarifying DPG outcomes and in augmenting performance in employment, communication, self-management, etc.

Reason for Referral: _____
 Date Requested: _____
 Information Learned: _____

Stage Two: Discovery Visits



Identify approximately five places where this individual can be observed in activities that give context to their Interests, Talents & Skills – **TAKE PHOTOS.**

1. _____
 Person responsible: _____ By this date: _____
 Date accomplished _____
2. _____
 Person responsible: _____ By this date: _____
 Date accomplished _____
3. _____
 Person responsible: _____ By this date: _____
 Date accomplished _____
4. _____
 Person responsible: _____ By this date: _____
 Date accomplished _____
5. _____
 Person responsible: _____ By this date: _____
 Date accomplished _____

Observations

Note your observations for each location, date, the specific tasks engaged in, skills utilized, and specific supports needed:

1. Location: _____
Date: _____
Tasks: _____
Supports Needed: _____

2. Location: _____
Date: _____
Tasks: _____
Supports Needed: _____

3. Location: _____
Date: _____
Tasks: _____
Supports Needed: _____

4. Location: _____
Date: _____
Tasks: _____
Supports Needed: _____

5. Location: _____
Date: _____
Tasks: _____
Supports Needed: _____

6. Location: _____
Date: _____
Tasks: _____
Supports Needed: _____

7. Location: _____
Date: _____
Tasks: _____
Supports Needed: _____

8. Location: _____
Date: _____
Tasks: _____
Supports Needed: _____

9. Location: _____
Date: _____
Tasks: _____
Supports Needed: _____

10. Location: _____
Date: _____
Tasks: _____
Supports Needed: _____

Summary of supports needed during these activities (be specific): _____

What environments & activities need to be avoided and why? _____

What places, skills and activities need more exploration? _____

Where/when will this exploration occur? _____

Who is responsible? _____

Report on follow-up exploration (Report each follow up activity with the date and descriptive narrative. Include what was learned, who participated, and the name of the person responsible for the activity): _____

Stage Three: Vocational Themes

(not job descriptions or business ideas)

Emerging themes that meld Tasks, Interests, Talents, and Skills:

1. _____
2. _____
3. _____

Identify 3 places for each theme where people with similar themes work:

Theme 1:

1. _____
2. _____
3. _____

Theme 2:

1. _____
2. _____
3. _____

Theme 3:

1. _____
2. _____
3. _____

Select and Arrange Informational Interviews to Add to Discovery

(Including short, preferably paid, work experiences in businesses or non-profits)

1. Location: _____
Person responsible: _____ By this date: _____
Date accomplished _____
Observations: _____

2. Location: _____
Person responsible: _____ By this date: _____
Date accomplished _____
Observations: _____

3. Location: _____
Person responsible: _____ By this date: _____
Date accomplished _____
Observations: _____

4. Location: _____
Person responsible: _____ By this date: _____
Date accomplished _____
Observations: _____

5. Location: _____
Person responsible: _____ By this date: _____
Date accomplished _____
Observations: _____

Note Supply & Customer Chain connections from each location and pursue further Discovery and Job Development options as appropriate. Record this information under "Observations" above.

Stage Three: Vocational Profile

Summarize findings from Discovery and include the following in your description. If a clear direction is identified

1. Interests, Talents, Skills, Tasks as observed; best ecological fit; best learning mode/methodology; places/situations to avoid; personal resources (benefits, family support, savings, transportation); most endearing/engaging qualities; exploitable skills: _____
2. Ideal Conditions of Employment: _____
3. What "off the job" support will be needed and who will provide? _____
4. How will this person stay in contact with their friends, and who will ensure this? _____

5. How will this person get to and from work? _____
6. What is this person's ideal work schedule (days and hours) and why? _____

Descriptive paragraph summarizing the individual's Vocational Profile (highlight concrete skills, tasks, and potential contributions to a workplace): _____

Stage Four: Job/Business Development Plan ☒

Note that in many States this Stage is not funded under Discovery/Assessment. This Stage instead signals the beginning of the Job Development and/or Career Planning Milestone.

List of Twenty Places where people with similar Vocational Themes Work:

Theme 1:	Theme 2:	Theme 3:
1. _____	1. _____	1. _____
2. _____	2. _____	2. _____
3. _____	3. _____	3. _____
4. _____	4. _____	4. _____
5. _____	5. _____	5. _____
6. _____	6. _____	6. _____
7. _____	7. _____	7. _____
8. _____	8. _____	8. _____
9. _____	9. _____	9. _____
10. _____	10. _____	10. _____
11. _____	11. _____	11. _____
12. _____	12. _____	12. _____
13. _____	13. _____	13. _____
14. _____	14. _____	14. _____
15. _____	15. _____	15. _____
16. _____	16. _____	16. _____
17. _____	17. _____	17. _____
18. _____	18. _____	18. _____
19. _____	19. _____	19. _____
20. _____	20. _____	20. _____

Note: Create representational portfolios, picture books, resumes, and other tools for job development as needed.

Person responsible: _____

By what date: _____

Date completed: _____

Describe the job development tool (attach or submit with this DSR): _____

DSR Final Approval Signatures For Discovery

NOTE: From this point forward you will continue to use the format described in Stage 4 to report all job development activities for wage employment.

For self-employment or business-within-a-business you will report through narrative case notes, submission of a business plan, and any negotiations documenting job development.

DSR Final Approvals Signatures in this section are done when the jobseeker and others decide this DSR answers the question “Who is this person?”, and all Team members agree to the direction the job development plan is going. This signals the end of Discovery and the jobseeker moves into job development and placement activities.

Participant: _____ Date: _____

Conservator/Care Provider: _____ Date: _____

VR Counselor Signature: _____ Date: _____

ACRE Certified Customized Employment Specialist: _____ Date: _____

Vocational Manager: _____ Date: _____

Stage Four: Informational Interviews for Job Development

Utilizing information gained during Discovery and summarized in this DSR, select 3 or 4 businesses from the list above and arrange Informational Interviews, or short-term Work Experiences, Internships, and Modified Apprenticeships for job development

1. **Business Name:** _____
Person responsible: _____
By this Date: _____ Date completed: _____

Contact person and title: _____
Phone: _____ - ext. _____ e-mail: _____

Notes: _____

Information Learned: _____

Follow up (what, who and by when): _____

Negotiation Notes: Date: _____ Notes: _____

2. **Business Name:** _____
Person responsible: _____
By this Date: _____ Date Completed: _____

Contact person and title: _____
Phone: _____ - ext. _____ e-mail: _____

Notes: _____

Information Learned: _____

Follow up (what, who and by when): _____

Negotiation Notes: Date: _____ Notes: _____

3. **Business Name:** _____
Person responsible: _____
By this Date: _____ Date Completed: _____

Contact person and title: _____
Phone: _____ - ext. _____ e-mail: _____

Notes: _____

Information Learned: _____

Follow up (what, who and by when): _____

Negotiation Notes: Date: _____ Notes: _____

4. **Business Name:** _____
Person responsible: _____
By this Date: _____ Date Completed: _____

Contact person and title: _____
Phone: _____ - ext. _____ e-mail: _____

Notes: _____

Information Learned: _____

Follow up (what, who and by when): _____

Negotiation Notes: Date: _____ Notes: _____

5. **Business Name:** _____
Person responsible: _____
By this Date: _____ Date Completed: _____

Contact person and title: _____
Phone: _____ - ext. _____ e-mail: _____

Notes: _____

Information Learned: _____

Follow up (what, who and by when): _____

Negotiation Notes: Date: _____ Notes: _____

6. **Business Name:** _____
Person responsible: _____
By this Date: _____ Date Completed: _____

Contact person and title: _____
Phone: _____ - ext. _____ e-mail: _____

Notes: _____

Information Learned: _____

Follow up (what, who and by when): _____

Negotiation Notes: Date: _____ Notes: _____

7. **Business Name:** _____
Person responsible: _____
By this Date: _____ Date Completed: _____

Contact person and title: _____
Phone: _____ - ext. _____ e-mail: _____

Notes: _____

Information Learned: _____

Follow up (what, who and by when): _____

Negotiation Notes: Date: _____ Notes: _____

DSR Final Approval Signatures

NOTE: DSR Final Approval Signatures in this section are done when the jobseeker and others agree on the job (development) placement negotiated outcomes, outlining the specific strategies to be implemented for successful employment (i.e.; self-employment, wage employment, resource ownership, supported employment, customized work activities or schedules, etc.).

Participant: _____ Date: _____

Conservator/Care Provider: _____ Date: _____

VR Counselor Signature: _____ Date: _____

ACRE Certified Customized Employment Specialist: _____ Date: _____

Vocational Manager: _____ Date: _____

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