

# Iowa IPS Documentation Requirements



## Milestone 1:

- **IA IPS Career Profile** (*fidelity & billing requirement; “living” document that is updated as needed*)
- **IA IPS Job & Education Search Plan** (*fidelity & billing requirement; can be updated with minor preference changes; if most or all job preferences change with a new job, a new Job Search Plan should be completed*)

## Milestone 2:

- **IVRS Job Development Monthly Report Form** (*billing requirement; IVRS form; individualized per job seeker, one form completed for each month during job development phase*)
- **IA IPS Job Start Form** (*fidelity & billing requirement; completed for each new work experience*)

## Milestone 3:

- **IA IPS Job & Education Support Plan, Initial** (*fidelity & billing requirement; begin form and complete the “Initial Evaluation of Job Supports” section during the first 45 days of employment to assess initial support needs, and submit with Milestone 3*)

## Milestone 4:

- **IA IPS Job & Education Support Plan, Updated & Finalized** (*fidelity & billing requirement; review form for any updates and complete “90 Day Job Support Evaluation” and “Transition Planning” sections during 45<sup>th</sup>-90<sup>th</sup> day of employment and submit finalized form with Milestone 4*)

## For Milestone Reauthorizations:

- **IA IPS Job End Form** (*fidelity & billing requirement; to assess the job end and identify changes that need to be made for next job search; also required for Milestone Reauthorizations*)

## Additional IPS Documents

- **IA IPS Disclosure Worksheet** (*not required, but useful for disclosure discussions; other required IPS documents also cover disclosure information*)
- **Detailed progress notes of client sessions** (*include method of contact and specific interventions/outcomes such as employers & job types explored; may be requested with Milestone documents*)
- **Employer Contact Log** (*fidelity requirement; typically, in the form of an Excel Spreadsheet or hand-written log with monthly, face-to-face employer contacts for tracking purposes*)
- **Active Client Case List/Supervisor Tracking Spreadsheet including Placement Spreadsheet**
- **Iowa IPS Monthly Data Report** (*typically completed by IPS Supervisor*)
- **Field Mentoring Logs** (*logs not required, but may be helpful to track Specialists’ needs and progress by Supervisor; field mentoring completed for employer contacts and client appointments*)
- **IPS Unit Meeting Notes** (*include meeting type, i.e. in person, virtual, by phone, client successes, barriers, shared job leads, team outcomes and goals*)