

Who's Knocking at Your Door?

Understanding and assessing your customer's situation and needs.

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Robyn L. Lewis, Ph.D.
Assistant Director, IIRER



**Illinois Institute for Rehabilitation
and Employment Research**

UNIVERSITY OF ILLINOIS URBANA-CHAMPAIGN

Agenda

- The 5 W's and Customer Profiles
- Applying for Services
- Customer Employment Lifecycle
- Plan for Support
- Continuous Assessment
- Customer Employment Life Cycle



The 5 W's

- ✓ Essential elements of building a story
- ✓ Information gathering
- ✓ Problem solving
- ✓ Ensures understanding
- ✓ Builds a vision
- ✓ Assists with planning



Who?

■ Who is your customer?

- Youth or Adult
- Independent or Guardian
- In school or out of school
- Educational background
- Disability type
- Functional Limitations

■ Who is in their support network?

- Guardian
- Family and/or friends
- CILA or other providers

■ Who brought them to your door?

- Self-referral
- Family/friend referral
- Agency referral

■ Who is assisting with decisions?

- No-one
- Agency
- Family/guardian



Why?

- **Why is the customer at your door?**

- Own volition
- Because someone said so...

- **Why is the customer seeking services?**

- Employment only
- Meaningful day only
- Combination
- Social engagement
- Housing, Advocacy, other

- **Why did they choose you?**

- Personal referral
- Agency referral
- Services

- **Why will you accept them?**

- Meet quota
- Good match
- Adequate funding

What?

- **What does the customer want?**
 - Competitive Employment
 - Skill building
 - Recreational/Social
- **What does the referral source want?**
 - Daily or intermittent services
 - Specific services or goals
 - Safe place to go
- **What are the support needs?**
 - Personal needs
 - Transportation
- **What are their resources?**
 - Financial Resources
 - HCBS Waiver or private pay
 - SSI/SSDI/Medicaid
 - Trust
 - Human Resources
 - Support network
 - No supports?
 - Transportation
 - Driver/non-driver
 - Access to public transportation



When?

- **When do services need to begin?**

- Immediately
- Near future
- Just exploring

- **When will they attend?**

- Daily?
- 2-3 times a week?
- Once a week?

- **When do they want to work?**

- Now
- 6 months
- No time frame



Where?

- **Where do they live?**

- independently
- with family/friend
- facility/CILA
- Homeless

- **Where do they need to go?**

- Funding
- Wraparound service

- **Where do they want to work?**

- Specific business
- Specific location
- Specific job type



How?

- **How will the customer pay for services?**

- Private Pay
- Home and Community Based Services Waiver
- Division of Rehabilitation

- **How will they achieve their goals?**

- **How will the customer get to work/programming?**

- Facility provided
- Door-to-Door Public
- Standard Public Route
- Driver services
- Parent
- Walk/drive/bike

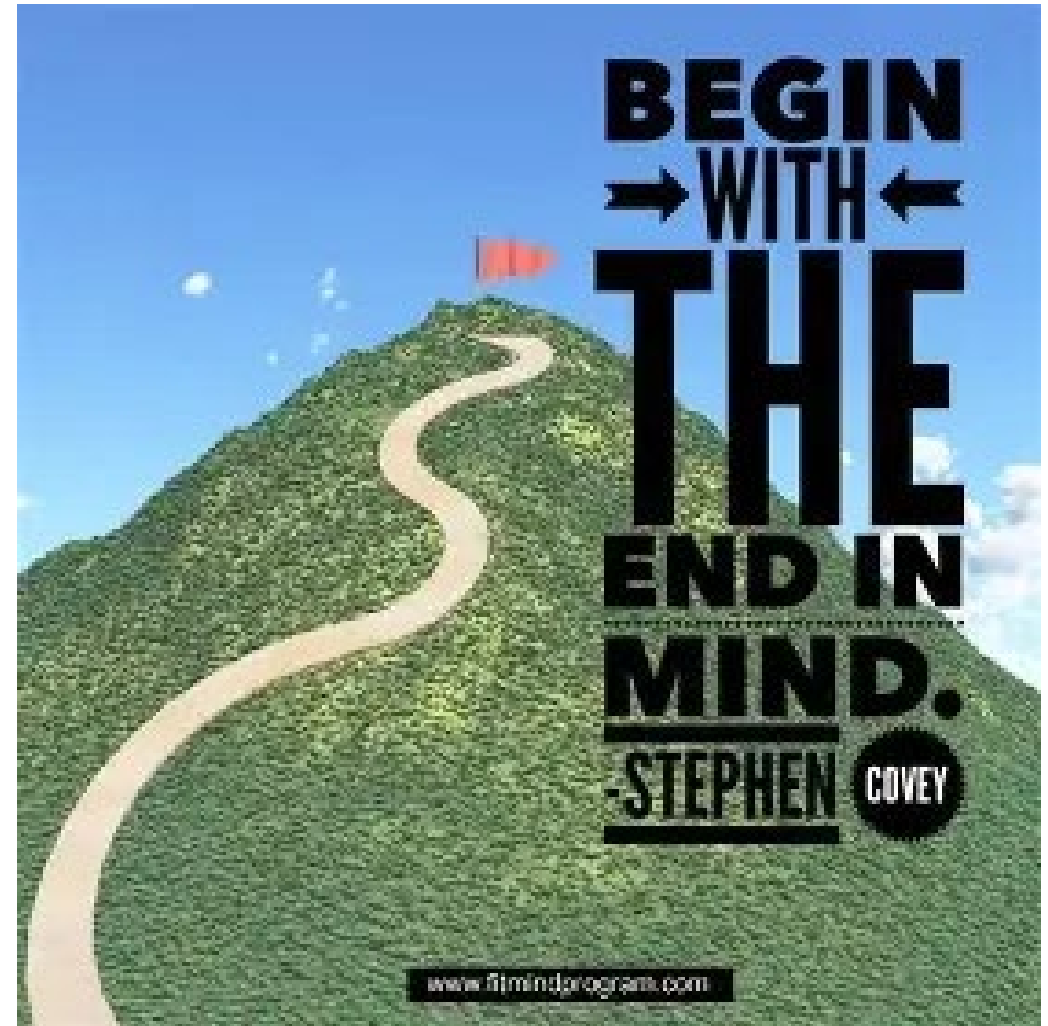


Applying for services



Begin with the end in mind

- ✓ **Consider** customer's
 - strengths, resources, priorities,
 - concerns, abilities, interests, and
 - informed choice
- ✓ **Identify** the ultimate goal
- ✓ **Create** actionable steps
- ✓ **Form** a timeline
- ✓ **Develop** a plan



Vital Documents

- State ID, Social security card, birth certificate
- Guardianship paperwork
- Insurance documents
- Disability documentation
 - Social security letter
 - School IEP
 - Psychological evaluation
 - Medical records



Benefits Assessment

- Social Security
 - SSI/SSDI
 - Need to apply?
- Work history
 - Previous competitive employment
- Benefits Planning
 - SSI/SSDI- MUST be referred
 - No SSI/SSDI- MUST be educated
- Insurance
 - Medicaid
 - Medicare
 - Private (Parents)
 - TriCare- Military
- ABLE Account and/or Special needs trust
 - Need a mechanism for saving \$
- Private Trust account



Referrals

- **What referrals are needed and why?**
 - State Agency (Service Coordination, DRS, DDD)
 - Benefits Planning
 - Assistive Technology
 - Transportation
- **How do you apply?**
 - Online
 - In-person
- **Who will complete and track the referral?**
 - Individual and/or guardian
 - Referring agency
 - Servicing Agency
 - Support agency (CIL)
- **When do referrals need to be completed and in what order?**



Decision Matrix

Customers seeking competitive integrated employment

Customer Type	Guardian		Developmental Disability (DD)		SSI/SSDI		Medicaid		HCBS (DD only)		Assistive Technology		Door-to-Door Transportation		Personal Assistance	
	YES	NO	YES	NO	YES	NO	YES	NO	YES	NO	YES	NO	YES	NO	YES	NO
In-School Youth (14- 22)	YES	NO	YES	NO	YES	NO	YES	NO	YES	NO	YES	NO	YES	NO	YES	NO
<i>Refer to</i>	Include Guardian	Provide guardianship info	DDD	DRS	Benefits Plan Apply as adult	Benefits Education	Apply for adult benefits at 18	Apply for Medicaid	Apply for adult benefits at 18	PUNS/ISC	IATP	XX	XX	Local Transport Agency	DRS HSP or DDD HCBS	XX
Youth (22-24)	YES	NO	YES	NO	YES	NO	YES		YES	NO	YES	NO	YES	NO	YES	NO
<i>Refer to</i>	Include Guardian	Provide guardianship info	DDD	DRS	Benefits Plan	Benefits Education	XX	Apply for Medicaid	XX	PUNS/ISC	IATP	XX	XX	Local Transport Agency	DRS HSP or DDD HCBS	XX
Adult (25+)	YES	NO	YES	NO	YES	NO	YES		YES	NO	YES	NO	YES	NO	YES	NO
<i>Refer to</i>	Include Guardian	XX	DDD	DRS	Benefits Plan	Benefits Education	XX	Apply for Medicaid	XX	PUNS/ISC	IATP	XX	XX	Local Transport Agency	DRS HSP or DDD HCBS	XX

Decision Matrix

- Meant to be a guide
- Not all encompassing
- Everyone's situation is individualized
- Customize with your local contacts



Customer Type

Customer Type	
In-School Youth (14- 22)	
	<i>Refer to</i>
Youth (22-24)	
	<i>Refer to</i>
Adult (25+)	
	<i>Refer to</i>

- In- School Youth (14-22)
 - Connect with school case manager
 - Understand IEP and current services
 - Recent Psychological Eval (or request one)
 - Can services be provided after school hours

- Youth (22-24)
 - Most recent IEP (yearly)
 - Psych eval. (3 yrs.)
 - Understand Program and services

- Adult (25+)
 - Medical records/diagnosis with IQ score



Guardian

Customer Type	Guardian	
In-School Youth (14- 22)	YES	NO
<i>Refer to</i>	Include Guardian	Provide supported decision Info
Youth (22-24)	YES	NO
<i>Refer to</i>	Include Guardian	Provide supported decision Info
Adult (25+)	YES	NO
<i>Refer to</i>	Include Guardian	Provide supported decision Info

- Guardians must be included in all decisions.
- Under 18- biological parent is automatic (unless court ordered)
- DCFS & Justice involved- may have assigned guardian
- At 18- students become own guardian regardless of the severity of the disability.
- Guardians are assigned through court petition
- Once a guardian is assigned, difficult to reverse
 - Can impact ability to live independently and drive
 - Cannot engage in binding contracts (rental agreements, loans, etc.)
- Supported Decision Making

Guardian Resources

- [Illinois Supported Decision-Making Act \(PA 104-0614\)](#)
- [Illinois Legal Aid Online](#)
 - Agreement templates
- [Illinois Guardianship and Advocacy Commission](#)
 - Brochures
 - Flow charts and graphics
 - Training
 - School and non-school age resources



Developmental Disability

Customer Type	Developmental Disability (DD)	
In-School Youth (14- 22)	YES	NO
<i>Refer to</i>	DDD	DRS
Youth (22-24)	YES	NO
<i>Refer to</i>	DDD	DRS
Adult (25+)	YES	NO
<i>Refer to</i>	DDD	DRS

- An intellectual disability
 - (IQ < 70) or
 - other severe, chronic disability, other than mental illness, closely related to an intellectual disability (ID).
 - Started **before 22** years of age
 - likely to **continue indefinitely**,
- **Substantial functional limitations** (3 or more areas)
 - self-care, language, learning,
 - mobility, self-direction,
 - capacity for self-sufficiency (independent living/economic)
- Needs a combination of services, individualized supports, or other assistance
 - **lifelong or extended duration**
 - are **individually planned** and coordinated.

Developmental Disability Resources

- [Illinois Developmental Disability Services \(DDD\)](#)

- How to apply
- [IDHS: Independent Service Coordination \(ISC\) Agencies](#)
- Provider lists
- Provider vacancies
- Resource library
- Home and Community Based Services Waiver
- PUNS information

- [Illinois Council for Developmental Disabilities \(ICDD\)](#)

- Advocacy
- Resource Library

- [Illinois Healthcare and Family Services \(HFS\)](#)

- Home and Community Based Services Waiver
- Eligibility



Division of Rehabilitation Resources

- [Illinois Division of Rehabilitation Services \(DRS\)](#)
 - How to [apply](#)
 - Vocational Rehabilitation
 - Home Services Program
 - Employment services for special populations
 - Blind and visually impaired
 - Deaf and hearing impaired
 - Hispanic, Latino, Latina, Latinx, Latine
 - Mental illness (IPS)
 - Benefits Planning
 - Workforce Development
 - Transition Services for Youth
 - [Forms and Brochures](#)



SSI/SSDI

Customer Type	SSI/SSDI	
In-School Youth (14- 22)	YES	NO
<i>Refer to</i>	Benefits Plan Reapply as adult	Benefits Education
Youth (22-24)	YES	NO
<i>Refer to</i>	Benefits Plan	Benefits Education
Adult (25+)	YES	NO
<i>Refer to</i>	Benefits Plan	Benefits Education

- Refer all SSI/SSDI recipients to a benefits planner
- Must reapply at 18 for adult benefits
- Understand Student Earned income Exclusion
- Ensure customers are reporting wages
 - Identify who will assist

Benefits Planning Tips

- Notify Benefits planner with ANY change in employment:
 - increase/decrease in hours;
 - increase in wages;
 - job loss; etc.
- Review Benefits plan throughout employment process
- Understand Impairment related Work Expenses

SSI/SSDI Resources

- [Prepare for Social Security benefits | SSA](#)
- [Apply for Supplemental Security Income \(SSI\) | SSA](#)
- [IDHS: Work Incentives Planning and Assistance \(WIPA\) program](#)
- [Student Earned Income Exclusion](#)
- [Achieving A Better Life Experience \(ABLE\) Accounts](#)
- [Impairment-Related Work Expenses](#)



Medicaid

Customer Type	Medicaid	
In-School Youth (14- 22)	YES	NO
<i>Refer to</i>	Apply for adult benefits at 18	Apply for Medicaid
Youth (22-24)	YES	
<i>Refer to</i>	XX	Apply for Medicaid
Adult (25+)	YES	
<i>Refer to</i>	XX	Apply for Medicaid

- All customers with SSI/SSDI should have Medicaid
- All customers with Intellectual and/or Developmental Disabilities need Medicaid to access HCBS
- Medicaid funds
 - HCBS
 - DRS Home Services
- Customers can only be enrolled in **ONE** waiver program
- Customers needing personal assistance and/or home services can use HCBS OR DRS Home services, not both.
- Youth **MUST** reapply as an adult at 18 yrs. old

Medicaid Resources

- [Illinois.gov - IL Application for Benefits Eligibility \(ABE\) ABE Home Page](#)
- [Medicaid Guide Home](#)
- [Illinois | Medicaid.gov](#)
- [F2F-Medicaid-general-questions-fact-sheet-Feb-8-final.1.pdf](#)



Home and Community Based Services (HCBS)

Customer Type	HCBS (DD only)	
In-School Youth (14- 22)	YES	NO
<i>Refer to</i>	Apply for adult benefits at 18	PUNS/ ISC
Youth (22-24)	YES	NO
<i>Refer to</i>	XX	PUNS/ ISC
Adult (25+)	YES	NO
<i>Refer to</i>	XX	PUNS/ ISC

- Apply through Independent Service Coordination Agency
 - PUNS
- Center for Medicaid Services (CMS)
 - Issues rules
- Illinois Dept of Healthcare and Family Services
 - Administration and Oversight
- IDHS- Division of Developmental Disabilities
 - Operating agency
- Eligibility
 - US citizen and IL resident
 - Medicaid financial eligibility
 - Level of care requirements
 - Cost of care equal or less than institutional care
 - Able to be safely supported at home or community setting
- HCBS Services
 - In-home or residential supports
 - Supported Employment
 - Self-Direction
 - Adaptive Equipment
 - Other supports



HCBS Resources

- [IDHS Office Locator](#)
- [IDHS: Chapter 500 - \(DDPAS-5\) Eligibility](#)
- [Support Waiver for Children and Young Adults with Developmental Disabilities | HFS](#)
- [Adults with Developmental Disabilities | HFS](#)
- [IDHS: Division of Developmental Disabilities](#)



Assistive Technology

Customer Type	Assistive Technology	
In-School Youth (14- 22)	YES	NO
<i>Refer to</i>	IATP	XX
Youth (22-24)	YES	NO
<i>Refer to</i>	IATP	XX
Adult (25+)	YES	NO
<i>Refer to</i>	IATP	XX

- School-age students typically use school issued Speech generated devices (SGD)
- Before the last year of school, students should acquire their own SGD
 - Speech Pathologist can request through Medicaid and/or family insurance
 - If the student is not covered under insurance/waiver, then a referral to DRS can be made (for those interested in working)
 - Important to program for adult life
- Assistive Technology for job accommodations
- [Illinois Assistive Technology Program](#)
 - Device loan and trials
 - Evaluations and assessments

Assistive Technology Resources

- [Illinois Assistive Technology Program](#)
- [Job Accommodation Network \(JAN\)](#)
- [Centers for Independent Living](#)
- [Illinois Life Span Resource List](#)



Transportation

Customer Type	Door-to-Door Transportation	
	In-School Youth (14- 22)	YES
<i>Refer to</i>	XX	Local Transport Agency
Youth (22-24)	YES	NO
<i>Refer to</i>	XX	Local Transport Agency
Adult (25+)	YES	NO
<i>Refer to</i>	XX	Local Transport Agency

- Critical to employment success
 - Think about work close to home (minimize need)
 - Think about work easy to get to (maximize options)
 - Consider self-employment
- Use DRS or HCBS to pay for
 - Transportation services
 - Vehicle modifications
- Identify your local transportation agency
 - Understand disability benefits
 - Paratransit application process
 - Is travel training offered
- Identify alternatives to public transportation
 - Friends, family, and paid support workers
 - Ride-share (Uber, Lyft, taxi, co-worker)

Transportation Resources

- [Centers for Independent Living](#)
- [IDHS: Adaptive Equipment, Assistive Technology, Home and Vehicle Modification Request Process](#)
- [Accessibility in the Public Right of Way: IDOT](#)
- [IDHS: Home Based Services - Transportation, Non-Medical](#)
- [Illinois State List: Community Disability, Assistive Technology & Transportation Services](#)
- [DRS Administrative Code- Vehicle Adaptation/Modification](#)



Personal Assistance

Customer Type	Personal Assistance	
In-School Youth (14- 22)	YES	NO
<i>Refer to</i>	DRS HSP or DDD HCBS	XX
Youth (22-24)	YES	NO
<i>Refer to</i>	DRS HSP or DDD HCBS	XX
Adult (25+)	YES	NO
<i>Refer to</i>	DRS HSP or DDD HCBS	XX

- Personal Assistance on the job is NOT included in job coaching
- Personal Assistance/Personal Support Services
 - Activities of Daily Living
 - Bathing, dressing, grooming
 - Toileting / wheelchair transfers
 - Eating
 - Mobility (walking/assisted/wheelchair)
- HCBS OR DRS Home Services can pay for personal assistance
- In-School youth-
 - What personal supports are currently provided
 - What supports will continue and how will they be paid



Personal Assistance Resources

- [IDHS: DRS Home Services Program](#)
- [Home and Community Based Services Waiver Programs | HFS](#)
- [Activities of Daily Living \(ADLs\): Checklist and Examples](#)



Customer Employment Lifecycle



School-Age Youth with Home and Community Based Services (HCBS)

1. Apply for adult HCBS waiver services at 18
2. 1 year prior to Graduation, refer to DRS Vocational Rehabilitation Services
3. Determine Community Rehabilitation Provider
4. Use HCBS for Day services, including DDD Group Supported Employment
5. Use DRS Employment contract to seek CIE
6. DRS case should remain open; transition to adult case at exit from school.



School-Age Youth without HCBS

1. Contact local ISC and apply for PUNS as early as possible
2. 1 year prior to Graduation, refer to DRS Vocational Rehabilitation Services (unless already engaged in PECT)
3. Determine Community Rehabilitation Provider
4. Seek private funding for day services (until selected for Waiver)
5. Use DRS Employment contract to seek CIE
6. DRS case should remain open; transition to adult case at exit from school.



School-Age Youth and DRS

- Pre Employment Career Training (PECT) formerly STEP
- Assistive technology and job accommodation
- Dual Credit courses
- Phase 1 and 2 of customized employment
- Phase 1 of supported employment contracts
- Home services and personal assistant services.



Adult with Home and Community Based Services (HCBS)

1. Determine Community Rehabilitation Provider
2. Use HCBS for Day services, including DDD Group Supported Employment
3. Use DRS Employment contract to seek CIE
4. Prior to DRS successful case closure, refer to DDD Individual Supported Employment for long term supports.



Adult without HCBS

1. Contact local ISC and apply for PUNS as early as possible
2. Determine Community Rehabilitation Provider
3. Use HCBS for Day services, including DDD Group Supported Employment
4. Use DRS Employment contract to seek CIE
5. Prior to DRS successful case closure,
 - Refer to DDD Individual Supported Employment for long term supports.
 - May be eligible for DRS continued support option



DRS and DDD Memorandum of Understanding

- [IDHS: DDD Supported Employment Program](#)
- [Flow of Adult Employment Services \(pdf\)](#)
- [Employment Collaboration: Services and Supports through DRS & DDD- Training](#)



Plan for Support

- Person-centered planning
- Understanding support needs
- Understanding who can provide support
- Understanding funding mechanisms available to pay for support needs
- Interagency collaboration
- Transparent and frequent communication



Continuous Assessment

- Case managers and counselors should continually monitor
- Customer situations could trigger new service needs
 - Turning 18
 - Gaining/losing competitive employment
 - Gaining HCBS funding
 - Guardian changes
 - Graduating school





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