

Tools for the Vocational Evaluator

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Conducting a vocational assessment in a systematic and consistent manner can be a challenging task. During the assessment, a lot of information is gathered by the evaluator and important details can easily be overlooked.

Writing a thorough and well-crafted report that is accessible to the average reader is also a challenge. In his/her report, the evaluator must process all the information gathered during the assessment without omitting any important elements that could affect the client's employability.

I would like to introduce here two simple tools I have designed to facilitate my work. The first is an evaluation checklist I consult during a vocational assessment. The checklist ensures I conduct the assessment systematically and that I cover all essential aspects needed for my vocational evaluation report. The second tool is a flowchart helping me to visualize the job selection process during report writing.

Since I often conduct vocational assessments for insurance companies and law firms, I have geared these tools accordingly. They are of course meant as examples and you are welcome to modify them to suit your needs. Keep in mind that these tools are not meant to be static. For me, they are work in progress and I try to improve them as I gain experience in the field. Hopefully, these tools will help you to be more consistent, accurate and time efficient with your own vocational assessments.

Evaluation Checklist

I have detailed below the essential elements I wish to cover during the assessment.

1. Before the evaluation:

- Review the client's medical file. I usually focus on the more recent reports (over the past year). I try to choose at least one example of each discipline (e.g. orthopaedic, psychological, physiatry, FAE, etc.) and focus on information related to the client's employability.

2. During the intake interview:

- Collect the client's information and cross-check it with the medical file.
- Collect the client's medical history plus current treatments and symptoms.
- Collect the client's education history including diplomas, certificates or licenses. Include current computer skills and driver's license.
- Collect the client's work history, including last known salary information. Verify if the client worked after his accident. If the client indicated he has not worked after his accident, clearly state so in the report.
- Collect information on the client's vocational interests and hobbies as well as his perceived ability to return to work and motivation.

3. During testing:

- Test the client's academic achievement.
- Test the client's aptitudes and GED.
- Test the client's vocational interests.
- Include a summary of behavioural observations on the client.

4. Report writing:

- Include all information collected in sections one, two and three.
- In the employment recommendation section, include a paragraph on how employment options were selected. Include the appropriate medical disclaimer (in the event that additional medical information on the client's physical/psychological restrictions is needed to confirm job suitability).
- Address the referral question (s), as applicable. Do not provide information or recommendations beyond what is asked by the referral source. For example, if the referral source asks to identify direct-entry employment options, do not include employment options that require additional skill training and/or academic upgrading.
- Support your opinions and recommendations with objective information (e.g. Test results, documented physical/psychological restrictions). You should comment on the client's employability from a vocational perspective only (i.e. in terms of academic achievement, work experience/transferable skills or aptitudes). Documented physical or psychological restrictions should also be considered when available.
- Include direct-entry employment options, if any. With insurance companies, the focus is usually on direct entry employment options.
- If requested by the referral source, include employment options that require additional academic upgrading and/or skills training.
- Recommend jobs matching the client's interest, if possible. If not possible, explain why.
- Recommend jobs matching the client's pre-injury wage, if possible.
- Provide a summary of findings and conclusions.

Vocational Evaluation Flow Chart

This chart provides an overview of the job matching process, taking into consideration the various aspects of a person's vocational profile.

