

## ***CERTIFIED VOCATIONAL EVALUATION of FLORIDA***

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### **REPORT OF VOCATIONAL EVALUATION WITH COMMUNITY BASED SITUATIONAL ASSESSMENT (CBSA)**

CLIENT NAME : (redacted) TBI Female  
DVR CASE ID# : (redacted)  
VR NUMBER : (redacted)  
AUTHORIZATION# : (redacted)  
CLIENT ADDRESS : (redacted), Florida  
CLIENT PHONE & EMAIL : (redacted)  
CLIENT EMAIL : (redacted)  
CLIENT AGE/DOB : 50/(redacted)  
REFERRAL SOURCE : (redacted)  
DATES OF APPOINTMENT : (redacted)-2025  
DATE OF REPORT : (redacted)-2025

#### **PURPOSE OF REFERRAL**

The purpose of this evaluation is to identify suitable vocational options and define appropriate courses of action for vocational rehabilitation. Unless otherwise specified, all background information shown in this report is based on Client's oral statements and/or documentation provided by the referring agency. Also, there is formatting throughout the report to assist the reader in skimming through, to obtain relevant information quickly. In both the narrative and tabular sections of the report, ***bold, italicized*** words are used to indicate ***problems*** or areas that ***need improvement/address***, and **bolded** words are used to indicate **vocationally-relevant assets, strengths or potentials**.

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#### **CLIENT'S SUMMARY**

##### **WORKER-TRAIT PROFILE:**

<u>Trait (Ed. Development/Aptitude)</u>	<u>Grade/Rating</u>
Reasoning (R)	C / Average
Math (M)	B / High Average
<b>Language (L)</b>	<b>A / Above Avg.</b>
<b><i>Spatial Perception (S)</i></b>	<b><i>D- / Below Avg.</i></b>
<b><i>Form Perception (P)</i></b>	<b><i>D / Below Avg.</i></b>
Clerical Perception (Q)	C- / Low Average
Motor Coordination (K)	C- / Low Average
Finger Dexterity (F)	D+ / Low Average
Manual Dexterity (Md)	C- / Low Average
Eye-Hand Coordination (E)	D+ / Low Average

Notes regarding GED, aptitude, coordination and dexterity ratings: With respect to estimated general population norms, Above Average = the top 20%; High Average = 60-79%ile; Average = 40-59%ile; Low Average = 20-39%ile; Below Average = 6-19%ile; Far Below Average = the bottom 5%. (Source: U.S. Department of Labor / BLS)

<u>Trait (Physical Capacity)</u>	<u>Rating</u>
<b>Lift/Carry/Push/Pull</b>	<b>Heavy Duty</b>
Sit/Stand/Walk	Continuous
Climb/Balance	Continuous
Bend/Stoop/Crouch/Squat/Kneel/Crawl	Continuous
Reach/Handle/Finger/Feel	Continuous
Talk/Hear/Write	Continuous
Seeing/Visual Acuity	Continuous
 <u>Trait (OSHA Compliant Environmental Tolerance)</u>	 <u>Rating</u>
Weather Exposure	Continuous
Extreme Cold	Continuous
Extreme Heat	Continuous
Damp/Humid/Wet	Continuous
Noise/Vibrations	Continuous
<b>Hazards: Mechanical/Electrical/Chemical/Heights (OSHA Compliant)</b>	<b>Rarely/Briefly</b>
<b>Exposure to Dust/Fumes/Odor/Mists/Gases (OSHA Compliant)</b>	<b>Occasional</b>

Notes regarding physical demand capacity (PDC), non-exertional demand and environmental tolerance ratings: All estimates are provisional, pending medical confirmation; Very Heavy Duty = more than 100#; Heavy Duty = 51# to 100#; Medium Duty = 26# to 50#; Light Duty = 11# to 25#; Sedentary = up to 10#; Occasional = up to 1/3 of the workday; Frequent = 1/3 to 2/3 of the workday; Continuous = more than 2/3 or more of the workday. (Source: U.S. Department of Labor / BLS)

## RECOMMENDED JOB TITLES:

### Recommended for Primary Consideration:

Note: See Appendix 1 for definition of codes & values. Job definitions can be accessed by entering the DOT Code into any search engine. For more detailed information about jobs, enter the job title into [www.mynextmove.org](http://www.mynextmove.org).

DOT Code	Job Title	VQ	SVP	TS	VA	VIPR				
<b>169.267-034</b>	<b>Research Analyst (Insurance)</b>	<b>115.30</b>	8	<b>60%</b>	<b>85%</b>	<b>ESTJ</b>				
Potentially				2023	2023	<u>2024-2032</u>				
Suitable Local				Entry	Exp..	Growth	Local	Tng		
Occupations (w/SOC Code)				Wage	Wage	Rate%	Openings	Rqmt		
<b>Market Research Analysts (131161)</b>				<b>\$16.08</b>	<b>\$37.96</b>	<b>08.8</b>	<b>8,482</b>	B		

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DOT Code	Job Title	VQ	SVP	TS	VA	VIPR				
<b>186.167-010</b>	<b>Estate Planner (Insurance)</b>	<b>113.45</b>	7	<b>40%</b>	<b>77%</b>	<b>ENTP</b>				
Potentially				2023	2023	<u>2024-2032</u>				
Suitable Local				Entry	Exp..	Growth	Local	Tng		
Occupations (w/SOC Code)				Wage	Wage	Rate%	Openings	Rqmt		
<b>Insurance Sales Agents (413021)</b>				<b>\$20.74</b>	<b>\$42.00</b>	<b>10.2</b>	<b>6,807</b>	PS		

### Recommended for Alternate Consideration:

Note: The following DOT Job Titles are indexed to SOC Occupations, which display local labor-market data, starting on page 23, below. Job definitions can be accessed by entering the DOT Code into any search engine. For more detailed information about jobs, enter the job title into [www.mynextmove.org](http://www.mynextmove.org). See Appendix 1 for definition of codes & values.

DOT Code	Job Title	VQ	SVP	TS	VA	VIPR
<b>219.362-010</b>	<b>Administrative Clerk</b>	<b>110.18</b>	4	<b>46%</b>	<b>77%</b>	<b>ESFP</b>
<b>162.267-010</b>	<b>Title Clerk</b>	<b>118.24</b>	6	<b>40%</b>	<b>75%</b>	INFP
<b>119.267-026</b>	<b>Paralegal</b>	<b>110.87</b>	7	<b>97%</b>	<b>79%</b>	INFP
<b>119.267-028</b>	<b>Paralegal</b>	<b>110.87</b>	7	<b>97%</b>	<b>79%</b>	INFP
<b>169.117-014</b>	<b>Grant Coordinator</b>	<b>110.52</b>	8	23%	<b>81%</b>	INFP
<b>162.117-014</b>	<b>Contract Administrator</b>	<b>110.26</b>	8	20%	<b>80%</b>	ESFJ
<b>186.267-026</b>	<b>Underwriter, Mortgage Loan</b>	<b>110.09</b>	8	23%	<b>76%</b>	<b>ESTJ</b>
<b>168.267-014</b>	<b>Claim Examiner</b>	<b>109.81</b>	7	23%	<b>74%</b>	<b>ESTJ</b>
<b>119.267-022</b>	<b>Legal Investigator</b>	<b>109.03</b>	7	<b>90%</b>	<b>86%</b>	INFP
<b>119.267-018</b>	<b>Contract Clerk</b>	<b>109.03</b>	7	<b>87%</b>	<b>76%</b>	INFP
<b>243.362-010</b>	<b>Court Clerk</b>	<b>108.89</b>	6	<b>71%</b>	<b>76%</b>	INTP
<b>119.267-010</b>	<b>Abstractor</b>	<b>108.65</b>	6	<b>85%</b>	<b>85%</b>	INFP
<b>119.287-010</b>	<b>Title Examiner</b>	<b>108.65</b>	7	<b>80%</b>	<b>75%</b>	INFP
<b>241.267-018</b>	<b>Claim Examiner</b>	<b>106.47</b>	7	<b>40%</b>	<b>79%</b>	ENTJ
<b>205.367-010</b>	<b>Admissions Evaluator</b>	102.30	6	<b>63%</b>	<b>77%</b>	<b>ESFP</b>
<b>209.367-046</b>	<b>Title Searcher</b>	92.63	5	<b>80%</b>	<b>77%</b>	<b>ESFP</b>
<b>199.267-034</b>	<b>Research Assistant II</b>	<b>114.63</b>	6	23%	<b>77%</b>	ENTJ

## VRC'S SUMMARY

### **CHALLENGES/BARRIERS:**

### **APPARENT STRENGTHS:**

Hx <b>Multi-TBI</b> ; Brief <b>UCSx1</b> & <b>NV/Diz</b> xx	<b>BS Legal Studies</b> ; AA Gen.Stud; AS Legal Asst HSG; "A/B"; English vs algebra; ( <i>redacted</i> ) Club 2-wk. formal OJT in <b>Inventory Compliance</b> 1-wk. seminar in <b>Trademark &amp; Copyright</b> law
Active sx = <b>NV/Diz</b> , <b>CFS</b> , <b>Attn</b> , " <b>Dull</b> " sensation	<b>Stable work history</b> ; 2-6 years in most positions <b>Computer literate</b> ; 43 WPM; MS Office <b>10 minutes early</b> ; Attire, grooming, hygiene OK Client appears considerably <b>younger</b> than her age.
<b>Imaging: High "black hole" volume</b> (neg.re-test)	Avg. Est. Gen. Cognit. Aptitude; <b>GCA=48%ile</b> <b>Above Avg.</b> scores on all <b>verbal</b> tests <b>EAS Numerical Reasoning = 96%ile</b>
<b>Not</b> under <b>psychiatric</b> treatment	Raised in <b>intact</b> household; <b>No criminal</b> record Divorced 20 years ago; <b>No children</b> <b>Homeowner</b> , Resides alone Class "E" d/l; Has <b>reliable transport</b>
Accurate but <b>slow</b> in <b>clerical matching</b> (17%ile)	<b>Neat &amp; well-organized</b> work habits <b>Unhurried, diligent</b> ; <b>Accuracy</b> over <i>speed</i> . Worked at problems <b>steadily</b> <b>No</b> indication of <b>fatigue</b> or <b>frustration</b> Unshakable <b>composure</b> in the two-day evaluation No unusual <b>behaviors</b> or <b>thought</b> processes Affect seemed quite <b>relaxed</b> (even <i>flat</i> at times)
WRAT: <b>GL 8.0 Math</b> Calculation	No <b>visual</b> , <b>auditory</b> or <b>motor</b> deficiencies <b>Attn/concentration</b> seemed intact Recep./expressive (oral/written) <b>language</b> intact <b>Polite</b> & agreeably <b>cooperative</b> ; <b>Motivated</b> LI Man.Dex: <b>Sys. load</b> ; <b>No laterality confusion</b> ,
Below Avg. <b>Spatial &amp; Form Perception</b> ratings	5'4"/125# ( <b>BMI=21.5</b> ) In <b>counseling</b> , for the past year Client claimed <b>no prior mental-health issues</b> .
Low Avg. <b>coord/dex.</b> scores due to <b>slow</b> speed	Still <b>attends boat-racing</b> ( <i>but doesn't drive</i> ) Plenty of <b>friends</b> ; <b>Fitness center</b> =/< 5 hrs./wk. <b>Reads</b> fiction for about a half-hour per day Weekly <b>relig.</b> svcs; Bible Study; Volunteers
Sit.Assm't: <b>Affect</b> perhaps a bit <b>flat</b>	Sit Assm't: <b>Professional-level skilled-work able</b>

**APPARENT NEEDS:****OTHER FACTORS:**

Recommend <u>consideration</u> be afforded to...	<b>Wants:</b> Legal research (no math), especially in trademark law; Prefers small firm/org.
<b>MD</b> to R/O Progesterone as causing NV/Diz, CFS	<b>Tx Skills:</b> Paralegal, LegalSec'y, CountyClk, InventoryClk, Regist.Clk, Cashier, Gen. H'dware Sales, Horticult.Wkr, Ofc.Hlpr; Exp.w/group brf (40), 1-1 OJT, supv.(2), bookkeeping, scheduling, MS Office, legal & inventory apps, farm tractor, machine-shop, Class A RV, E Econo Boatster.
<b>PsychEval</b> to R/O Depression as cause of CFS	<b>F(x):</b> Medium PDC, w/limited <i>hazards, heights, dusts, fumes</i> , etc. Avoid <i>overwhelming workload, very rapid pace of work, tight deadlines &amp; lack of personal control</i> .
<b>NeuroEval.</b> (w/PET/SPECT as ind.) for prognosis	<b>VIPR:</b> ESTP "The Entrepreneur/Promotor/Negotiator"; Action-oriented, Adaptable, Competitive & Self-Confident; Crisis mgmt.; Sales/Promo; Willing risk-takers; Attn. to detail
<b>Psychiatrist</b> ref'l for treatment (meds), if prescr.	<b>Values:</b> Working conditions & morality rated most important, followed closely by ability utilization, achievement, independence, security, co-workers, advancement, social service, company policies, quality supervision, creativity & responsibility. Autonomy, compensation & recognition were assigned a neutral rating. <i>Variety, authority &amp; social status</i> rated least important.
<b>Occupational Therapy</b> (OT) if prescribed (speed)	
<b>Speech Therapy</b> to address flat affect	
<b>OT/Games:</b> spatial/form perception, coordination, dexterity, psychomotor speed & processing speed	
<b>Khan Academy</b> for GL 8.0 math remediation	
<b>Job Coach:</b> job srch; arrange accom; work-adjust.	

Potentially Suitable Local Occupations (w/SOC Code)	2023 Entry Wage	2023 Exp.. Wage	2024-2032 Growth Rate%	Local Openings	Tng Rqmt
<b>Claims Adjusters, Examiners &amp; Investigators (131031)</b>	<b>\$35.93</b>	<b>\$43.83</b>	<b>10.0</b>	<b>2,489</b>	PS
<b>Insurance Sales Agents (413021)</b>	<b>\$20.74</b>	<b>\$42.00</b>	<b>10.2</b>	<b>6,807</b>	PS
<b>Paralegals &amp; Legal Assistants (232011)</b>	<b>\$19.62</b>	<b>\$29.59</b>	<b>11.6</b>	<b>6,601</b>	A
<b>Business Operations Specialists, All Other (131199)</b>	<b>\$18.15</b>	<b>\$26.67</b>	<b>08.7</b>	<b>7,844</b>	B
<b>Market Research Analysts (131161)</b>	<b>\$16.08</b>	<b>\$37.96</b>	<b>08.8</b>	<b>8,482</b>	B
<b>Purchasing Managers (113061)</b>	<b>\$38.32</b>	<b>\$63.75</b>	<b>08.1</b>	396	B
<b>Title Examiners, Abstractors &amp; Searchers (232093)</b>	<b>\$17.19</b>	\$25.82	<b>10.5</b>	923	PS
<b>Loan Officers (132072)</b>	<b>\$16.21</b>	<b>\$42.51</b>	00.6	<b>1,780</b>	B
Teaching Assistants, Postsecondary (119199)	\$15.49	<b>\$30.53</b>	04.7	570	B
Court, Municipal & License Clerks (434031)	\$14.96	\$23.79	07.0	<b>1,856</b>	HS
Office Clerks, General (439061)	\$14.36	\$22.92	<b>09.0</b>	<b>32,250</b>	PS
Legal Support Workers, All Other (232099)	\$13.40	\$21.27	06.6	341	A

**Legend:**Entry\$=**16/19**;Exp.\$=**26/42**;Growth%=**8/10**;Opens#=**1K/6K****Titles** featuring 4 bolded values are bold/highlighted.**Titles** featuring 3 bolded values are bolded.

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### **RESPONSES TO REFERRAL QUESTIONS**

**1. WHAT ARE INDIVIDUAL'S ACADEMIC BASIC SKILLS ACHIEVEMENT LEVELS?**

See page 16.

**2. WHAT IS INDIVIDUAL'S IQ LEVEL?**

See page 16.

**3. WHAT IS THE VOCATIONAL INTEREST OF THE INDIVIDUAL?**

See page 16.

**4. CAN THIS INDIVIDUAL RETURN TO WORK AT THE PREVIOUS OCCUPATION?**

With full accommodation & implementation of recommended supportive measures, Client appears to be capable of returning to work in selected positions represented by job titles in her work history.

**5. DOES THIS INDIVIDUAL HAVE TRANSFERABLE SKILLS?**

See page 14.

**6. IS THIS INDIVIDUAL READY FOR DIRECT JOB PLACEMENT?**

With full accommodation & implementation of recommended supportive measures, Client appears to be ready for direct placement in selected positions represented by recommended job titles featuring significant transferable skills (TS= $\geq$ 40%), as well as those which require specific vocational preparation at or below level 7.

**7. CAN THIS INDIVIDUAL TOLERATE A FULL DAY OF WORK?**

With full accommodation & implementation of recommended supportive measures, Client may be able to tolerate a full day of work, but she should start with a part-time schedule, and then increase her hours, as tolerated. This process should be medically monitored.

**8. IS THIS INDIVIDUAL EMPLOYABLE IN PART-TIME OR FULL-TIME WORK?**

With full accommodation & implementation of recommended supportive measures, Client appears to be employable on a part-time basis, and she may be able to tolerate a full-time schedule, but she should start with a part-time, and then increase her hours, as tolerated. This process should be medically monitored.

**9. WHAT ARE CLIENT'S PHYSICAL/MOTOR SKILLS?**

The following test scores...

Percentile	GATB Std. Score	Aptitude/Perception	Name of Test or Subtest
9	73	Q F E	EAS MANUAL SPEED AND ACCURACY
22	85	K MdE	LI MANUAL DEXTERITY
32	90	KF E	LI FINGER DEXTERITY

...yielded the following worker-trait ratings...

Trait (Ed. Development/Aptitude)	Grade/Rating
Motor Coordination (K)	C- / Low Average
Finger Dexterity (F)	D+ / Low Average
Manual Dexterity (Md)	C- / Low Average
Eye-Hand Coordination (E)	D+ / Low Average

#### 10. DOES CLIENT STAY ON TASK?

Yes.

#### 11. ARE THERE ATTENDANCE/PUNCTUALITY ISSUES?

No.

#### 12. HOW DID CLIENT PERFORM IN THE OFFICE-BASED AND COMMUNITY-BASED SITUATIONAL ASSESSMENTS?

- A. Observations During Phase I (Vocational Interview & Testing): See page 7.
- B. Observations During Phase II (Community-Based Situational Assessment): See page 18.

#### 13. IS CLIENT RECOMMENDED FOR TRAINING/EDUCATION?

See page 26.

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### **PHASE I: VOCATIONAL INTERVIEW & TEST RESULTS**

#### **1. OBSERVATIONS:**

Client was about ten **(15) minutes early** for her Phase I (vocational interview & testing) appointment. She said she had slept and eaten, prior to her arrival. Her **attire, grooming & hygiene** were unremarkable, but Client did appear considerably **younger** than her stated age. She manifested **no unusual behaviors or thought processes**, and her affect seemed quite **relaxed**, and at times, almost *flat*.

Otherwise, no discernible indications, suggestive of pathology, were detected. No **visual, auditory or motor** deficiencies were detected, and her **attention/concentration** capacity and receptive/expressive (written and oral/auditory) **language** ability seemed intact. Her manner was **polite** and she was **agreeably cooperative**, manifesting a seemingly average level of **motivation**. Rapport was readily established at a level suitable for testing.

Client's work habits were reasonably **neat & well-organized**, and her executive style, though **unhurried**, was quite **diligent**; emphasizing **accuracy** over **speed**. She worked at problems **steadily**, with no observable indication of fatigue or frustration. This was especially evident in the EAS Manual Speed & Accuracy Test, which involves placing pencil dots in small circles for five minutes. Client did not stop, mid-way through the test, to shake out and rub her hand, like most examinees do (often accompanied by audible complaints). She maintained a notable degree of **composure** throughout the two-day evaluation session (which, by design, involved some periods of operational stress).

Client loaded the LI Manual Dexterity board **systematically**, and evidenced **no laterality confusion**, during the trial phase. Client demonstrated a commercially-viable level of **computer literacy**, in accessing and configuring the typingtest.com application, on which she scored **43 WPM (with no errors)** – an average word-processing speed, for computer-literate individuals.

## 2. MEDICAL/PSYCHIATRIC:

When asked about physical disability conditions and/or chronic illnesses which may affect employability, Client mentioned having sustained **multiple concussions (MTBI)**, mostly in motor-vehicle accidents (including racing). She claimed to have **lost consciousness** (for about a minute), after only one of these events (walking into an open door, last February). However, she did say that she has experienced **nausea & dizziness** (NV/Diz) after some previous concussions, noting that these symptoms **persist, to the present day**. When asked about any other persistent symptoms, Client said she experiences **chronic fatigue (CFS)** and often has difficulty maintaining **attention (Attn)**. Then she pointed to her **forehead** and stated that she experiences a **“dull sensation”** there. She was unable to provide clarification, either direct or metaphorical. Client said she has undergone multiple neuro-imaging studies, including C-T and MRI scans. One such test revealed a **high “black hole” volume** (which can indicate lesions); **but re-test results were negative**.

Otherwise, Client claimed no significant prior medical history. She denied frequent toothaches and said her last eye-exam was four months ago, noting that she got new contacts for distance vision. (She uses reading glasses for close work.) When asked to describe her overall physical health, Client said it is “good”, adding that it could be excellent, if she could eliminate her “...neuro problems and chronic fatigue...”. She said she takes vitamins & hormones (including **progesterone; possible side effects of which include fatigue, nausea and dizziness**), but no prescription medications. She denied using nicotine or ethanol. She takes CBD, but denied any other use of cannabis. Client described her appetite as “good” and noted that she sleeps “OK”. She gave her height/weight as **5’4”/125# (BMI=21.5)**. Client said she has been **in counseling for the past year**, due to her persistent **fatigue** (which, she noted, is possibly symptomatic of **depression**). She indicated that she **doesn’t feel counseling is helping**, much, but she still plans to continue with the sessions, for a while. (Note that she is taking **no psychiatric medications**.) Client claimed **no prior mental-health issues**.

## 3. PHYSICAL, ENVIRONMENTAL, PSYCHOSOCIAL RESTRICTIONS:

Those who are at risk for neurological and/or neuropsychiatric disorders should consider avoiding situations involving prolonged exposure to **work-related stressors**, such as **overwhelming workload**, very **rapid pace** of work, **tight deadlines** and a perceived **lack of personal control**. Client is **provisionally** rated at **Medium-Duty PDC** (physical demand capacity), with **environmental-tolerance restrictions** (see below), **pending medical review**. Since no medical or psychological documentation was provided with this referral, the following residual physical functional capacity and environmental tolerance ratings are based on Client's responses to structured interview questions:



Note: *Significant limitations are bold/italicized.*

Elements	Ratings	Descriptions	Functional Categories / Scales of Measurement
AP7	3	Drive	1=Poor 2=Low Average 3=Low Middle 4=High Middle
AP7	4	Eye-Hand-Foot Coordination	1=Poor 2=Low Average 3=Low Middle 4=High Middle
AP8	3	Color Discrimination	1=Poor 2=Low Average 3=Low Middle 4=High Middle
PD1	3	Lift	In pounds: 1=<10 2=10-20 3=20-50 4=50-100 5=>100.
PD1	3	Carry	In pounds: 1=<10 2=10-20 3=20-50 4=50-100 5=>100.
PD1	3	Push	In pounds: 1=<10 2=10-20 3=20-50 4=50-100 5=>100.
PD1	3	Pull	In pounds: 1=<10 2=10-20 3=20-50 4=50-100 5=>100.
PD1	3	Sit	1=Sedentary 2=Flexible 3=No Problems Noted.
PD1	3	Stand	1=Sedentary 2=Flexible 3=No Problems Noted.
PD1	3	Walk	1=Sedentary 2=Flexible 3=No Problems Noted.
PD2	1	Climb Stairs	0=Not Present to Occasional 1=Frequently to Constantly.
PD2	1	Climb Ladders	0=Not Present to Occasional 1=Frequently to Constantly.
PD2	1	Climb Scaffold	0=Not Present to Occasional 1=Frequently to Constantly.
PD3	1	Bend	0=Not Present to Occasional 1=Frequently to Constantly.
PD3	1	Stoop	0=Not Present to Occasional 1=Frequently to Constantly.
PD3	1	Crouch	0=Not Present to Occasional 1=Frequently to Constantly.
PD3	1	Squat	0=Not Present to Occasional 1=Frequently to Constantly.
PD3	1	Kneel	0=Not Present to Occasional 1=Frequently to Constantly.
PD3	1	Crawl	0=Not Present to Occasional 1=Frequently to Constantly.
PD4	1	Reach	0=Not Present to Occasional 1=Frequently to Constantly.
PD4	1	Handle	0=Not Present to Occasional 1=Frequently to Constantly.
PD4	1	Finger	0=Not Present to Occasional 1=Frequently to Constantly.
PD4	1	Feel	0=Not Present to Occasional 1=Frequently to Constantly.
PD5	1	Talk-Hear	0=Not Present to Occasional 1=Frequently to Constantly.
PD5	1	Write Orders	0=Not Present to Occasional 1=Frequently to Constantly.
PD5	1	Write Phone Messages	0=Not Present to Occasional 1=Frequently to Constantly.
PD6	1	See Close-up	0=Not Present to Occasional 1=Frequently to Constantly.
PD6	1	See Far-away	0=Not Present to Occasional 1=Frequently to Constantly.
EC1	3	Weather (Indoor/Both/Outdoor)	1=Mostly Indoors 2=Both Indoors and Outdoors 3=Mostly
EC2	1	Extreme Cold	0=Not Present to Occasional 1=Frequently to Constantly.
EC3	1	Extreme Heat	0=Not Present to Occasional 1=Frequently to Constantly.
EC4	1	Dampness	0=Not Present to Occasional 1=Frequently to Constantly.
EC4	1	Humidity	0=Not Present to Occasional 1=Frequently to Constantly.
EC4	1	Wetness	0=Not Present to Occasional 1=Frequently to Constantly.
EC5	1	Quiet Noise	0=Not Present to Occasional 1=Frequently to Constantly.
EC5	1	Lt-Mod Noise	0=Not Present to Occasional 1=Frequently to Constantly.
EC5	1	Loud/Jar/Jolt	0=Not Present to Occasional 1=Frequently to Constantly.
<b>EC6</b>	<b>0</b>	<b>Mechanical Hazards</b>	<b>0=Not Present to Occasional 1=Frequently to Constantly.</b>
<b>EC6</b>	<b>0</b>	<b>Electrical Hazards</b>	<b>0=Not Present to Occasional 1=Frequently to Constantly.</b>
<b>EC6</b>	<b>0</b>	<b>Chemical Hazards</b>	<b>0=Not Present to Occasional 1=Frequently to Constantly.</b>
<b>EC6</b>	<b>0</b>	<b>Heights Over 6 Feet</b>	<b>0=Not Present to Occasional 1=Frequently to Constantly.</b>
<b>EC7</b>	<b>0</b>	<b>Dusts</b>	<b>0=Not Present to Occasional 1=Frequently to Constantly.</b>
<b>EC7</b>	<b>0</b>	<b>Fumes</b>	<b>0=Not Present to Occasional 1=Frequently to Constantly.</b>
<b>EC7</b>	<b>0</b>	<b>Odors</b>	<b>0=Not Present to Occasional 1=Frequently to Constantly.</b>
<b>EC7</b>	<b>0</b>	<b>Mists</b>	<b>0=Not Present to Occasional 1=Frequently to Constantly.</b>
<b>EC7</b>	<b>0</b>	<b>Gases</b>	<b>0=Not Present to Occasional 1=Frequently to Constantly.</b>

#### 4. SOCIAL/FINANCIAL/HOUSING/TRANSPORTATION:

Client was born in (*redacted*), FL, and was raised in an **intact** (*redacted*) County household, by her mother and father (farmers). She has two sisters. The eldest (age 52) is in marketing, and the younger (age 48) runs a pottery studio. All immediate family members live nearby. When asked whether her early home atmosphere was more calm or more tense, she said it was both.

When asked if she ever witnessed or experience any abuse in the home environment, she said that discipline was strict, in her house (and, at times, physical), but never rose to the level of abuse. Client claimed **no criminal record**. She is divorced; married for less than a year, about 20 years ago. She has **no children**. Client, a **homeowner**, resides alone. She has a standard Class “E” Florida **driver’s license**, as well as an expired competition license. She drives a late-model Nissan Pathfinder, said to be **reliable transport**. Client does not receive SSI/SSDI. She claimed less than \$10K in unsecured (medical debt), which she said is “pending processing”.

When asked about hobbies & interests, Client said she still attends boat-racing events, though she no longer drives in them. She claimed no organizational affiliation, but she said she does have plenty of **friends**. She goes to a local **fitness center**, up to 5 times per week, where she uses a treadmill and does limited weight-training. Client watches television for less than an hour a day, on average; mostly current events & occasional movies. She **reads** for about a half-hour per day; mostly fiction. Client said she attends **religious** services, on a **weekly** basis. She also **volunteers** in support of church activities and participates in **Bible-study** groups.

## 5. EDUCATION:

Client **graduated from high school** in 1993, with an “A/B” average. Her best grades were in **English**, and her lowest marks were in **algebra**. When asked about extra-curricular activities, Client said she was a member of the “(redacted) **Club**” (leadership & community service) but noted that most of her free time was taken up by the family’s main leisure pursuit –**boat racing**, which involved **extensive travel**.

After high school, Client attended (redacted) Community College, where she graduated with dual Associate’s Degrees (**AA General Studies & AS Legal Assisting**), in 1996. She went on to graduate from (redacted), in 2000, with a **BS in Legal Studies (Paralegal)**. She said she maintained an “A/B” **average** throughout her college career. Additional training included a two-week formal **OJT in inventory compliance** and week-long **trademark & copyright seminar** in (redacted).

## 6. TEST RESULTS:

### Thematic Summary

Client achieved **above-average scores in all verbal tests**, as well as a test of quantitative reasoning. This latter result (96%ile on the EAS Numerical Reasoning test) suggests that, with limited remedial effort (perhaps 6-12 months of self-guided math remediation through online resources such as Khan Academy), she *may* be able to raise her (**GL 8.0**) **math** computation ability from the current level to GL 12.9+. Client’s superb verbal scores (ranging from 91%ile in Sentence Comprehension and 92%ile in Spelling to 97%ile in Word Reading) are consistent with her ambition to do legal research. Most of her below-average scores (spatial reasoning, form perception and dexterity coordination) represent shortfalls in worker-traits that would have little impact on her likely career path. The one exception might be **clerical aptitude**, which is best represented by her 17%ile score on a test of clerical matching (EAS Visual Speed & Accuracy), where her performance was **generally accurate**, but **relatively slow**.

### Batteries

Employee Aptitude Survey (**EAS**)

Flanagan Industrial Tests (**FIT**)

Lafayette Instruments (**LI**)

McCroskey Vocational Quotient System (**MVQS**)

Wide Range Achievement Test V (**WRAT**)

Traits-Instruments/Methods

**CLERICAL APTITUDE** - WRAT Spelling, EAS Visual Speed & Accuracy (clerical matching)

**DATA ENTRY SKILLS** – Observation, *typingtest.com*

**EYE-HAND/FINE-MOTOR COORDINATION** – EAS Manual Speed & Accuracy (dots in circles)

**FINGER DEXTERITY** – LI Finger Dexterity (pins in holes)

**FORM PERCEPTION** - EAS Vis. Pursuit (intersections), Space Vis. (3D stacks), FIT Assembly

**LOGIC (NON-VERBAL/NUMERICAL)** - EAS Symbolic Reasoning

**MANUAL DEXTERITY & COORDINATION** – LI Manual Dexterity (disks in holes)

**MATH CALCULATION** – WRAT Math Computation

**OCCUPATIONAL VALUES & NEEDS** – MVQS Occup. Values & Needs Inventory (OVNI)

**QUANTITATIVE REASONING** – EAS Numerical Reasoning (sequence recognition)

**READING COMPREHENSION** - WRAT Word Reading, Sentence Comprehension

**SPATIAL PERCEPTION & REASONING** – EAS Space Vis. (3D stacks of bricks), FIT Assembly

**SPELLING** - WRAT Spelling

**VERBAL REASONING** – EAS Verbal Reasoning (facts & conclusions)

**VOCATIONAL INTEREST PATTERN** – MVQS Voc. Interest & Pers. Reinforcer (VIPR)

**WORK-PERSONALITY** – MVQS Voc. Interest & Personality Reinforcer (VIPR)

The **Employee Aptitude Survey (EAS)** consists of 10 tests that measure cognitive, perceptual, and psychomotor abilities required for successful job performance in a wide variety of occupations. Client's percentile scores were established in comparison with estimated general population norms. The EAS subtests, employed for this administration, are summarized, below:

**Visual Pursuit Test**-Measures speed and accuracy in visually tracing lines. For draftsmen, design engineers, checkers, technicians.

**Visual Speed and Accuracy Test**-Measures ability to see details quickly and accurately. For bookkeepers, accountants, general office clerks, stenographers, machine operators. Most sales supervisors and executives should be above average.

**Space Visualization Test**-Measures ability to visualize and manipulate objects mentally. Valuable for jobs that demand mechanical aptitude, such as draftsman, engineer, technician.

**Numerical Reasoning Test**-Measures ability to analyze generalizations and see relationships. For technical, supervisory, and executive positions.

**Verbal Reasoning Test**-Measures ability to analyze information and form conclusions based on that information. Valuable for jobs that require ability to organize, evaluate, and use information, such as administrative and technical decision making, supervisory, scientific, and accounting.

**Word Fluency Test**-Measures flexibility in communication by requiring the examinee to write as many words as possible beginning with a specific letter. For oral or written expression typically needed by salespersons, journalists, representatives, writers, receptionists, secretaries, and executives. No scoring key needed.

**Manual Speed and Accuracy Test**-Measures ability to make repetitive fine finger movements rapidly and accurately. For clerical workers, machine operators, technicians, and repairmen. No scoring key needed.

**Symbolic Reasoning Test**-Measures ability to manipulate abstract symbols mentally and to make judgments and valid decisions. For evaluating high level science and technology workers, troubleshooters, data programmers, accountants, engineers, scientific personnel.

The **Flanagan Industrial Test (FIT) Battery** is comprised of 18 individual instruments that are used for selection, placement, reassignment, and vocational counseling. These tests are designed to help measure distinct aptitudes or functions important to a variety of industrial positions. Percentile norms are based on more than 40 job classifications, as well as high-school seniors and generalized industrial workers. Validation studies were conducted in various companies for a variety of jobs and measures were found to be related to job performance. The **FIT Assembly Test** measures the ability to visualize how separate pieces will look as a whole, calling on form perception and spatial reasoning.

The **Lafayette Instruments (LI) Finger Dexterity Test** requires the Client to extract small pins from a tray and place them in holes, on a template, first with one hand, then with the other. Performance on this instrument gauges finger dexterity and eye-hand coordination. Estimated general population norms were employed.

The **Lafayette Instruments (LI) Manual Dexterity Test** requires the Client to extract a checker-size disk from a flat template, with one hand; transfer the object to the other hand; rotate it; and replace it (upside down) in the same hole. This is repeated at speed with subsequent discs...switching hands at the beginning of each row. Performance on this instrument gauges upper-extremity proprioception & kinesthesia, manual dexterity and eye-hand coordination. Estimated general population norms were employed.

The **McCroskey Vocational Quotient System Occupational Values and Needs Inventory (MVQS-OVNI)** is a self-rating instrument which profiles the individual's preferences, in terms of 20 specific job-related reinforcers. This profile is then used to match the individual with specific job types, based on work values ("global aspects of work that are important to a person's satisfaction"), published by the U.S. Department of Labor.

The **McCroskey Vocational Quotient System Vocational Interest & Personality Reinforcer Type (MVQS VIPR-Type)** matches individuals with specific job types, based on their vocational interests, occupational values, needs, and general Jung people-based personality type.

The **Wide-Range Achievement Test V (WRAT)** assesses reading, spelling, and math skills, providing age or grade normed standard, percentile & grade-level scores, in subject aged 5-85. Percentile scores were established in comparison with age-peer norms

**Word Reading** measures untimed letter identification and word recognition. The examinee reads aloud a list of letters/words.

**Sentence Comprehension** measures the ability to identify the meaning of words and to comprehend the ideas and information in a sentence using untimed modified cloze procedure. Each item requires the examinee to read (aloud or silently) a sentence with a missing word, and then say the word that best completes the sentence.

**Spelling** measures an individual's ability to write letters and words from dictation without a time limit.

**Math Computation** measures an individual's ability to count, identify numbers, solve simple oral math problems, and calculate written math problems with a time limit. Problems are presented in a range of domains including arithmetic, algebra, geometry, and advanced operations.

*Note: **GATB** = General Aptitude Test Battery (Mean = 100; SD = 20). Aptitude, Perception & Dexterity/Coordination code designations are as follows:*

<u>Cognitive Aptitudes</u>	<u>Perceptions</u>	<u>Dexterity/Coordination</u>
R=Reasoning	S=Spatial Perception	Md=Manual Dexterity
M=Math	P=Form Perception	F=Finger Dexterity
L=Language	Q=Clerical Perception	K=Motor Coordination
		E=Eye-Hand Coordination

BELOW AVERAGE (<34th%-ile)

*Note: See Appendix I for definitions of codes & values as well as text-formatting criteria.*

<u>Percentile</u>	<u>GATB Std. Score</u>	<u>Aptitude/Perception</u>	<u>Name of Test or Subtest</u>
17	81	Q	EAS VISUAL SPEED AND ACCURACY
<b>1</b>	<b>55</b>	<b>R SP</b>	<b>EAS SPACE VISUALIZATION</b>
9	73	Q F E	EAS MANUAL SPEED AND ACCURACY
10	74	R SP	FIT ASSEMBLY
22	85	K MdE	LI MANUAL DEXTERITY
32	90	KF E	LI FINGER DEXTERITY

AVERAGE (34<sup>th</sup> to 65<sup>th</sup> %-ile)

*Note: See Appendix I for definitions of codes & values as well as text-formatting criteria.*

<u>Percentile</u>	<u>GATB Std. Score</u>	<u>Aptitude/Perception</u>	<u>Name of Test or Subtest</u>
34	91	R PQ	EAS VISUAL PURSUIT
57	105	RM Q	EAS SYMBOLIC REASONING
34	91	RM	WRAT MATH COMPUTATION

ABOVE AVERAGE (>65<sup>th</sup> %-ile)

*Note: See Appendix I for definitions of codes & values as well as text-formatting criteria.*

<u>Percentile</u>	<u>GATB Std. Score</u>	<u>Aptitude/Perception</u>	<u>Name of Test or Subtest</u>
<b>96</b>	<b>134</b>	<b>RM Q</b>	<b>EAS NUMERICAL REASONING</b>
82	118	R L Q	EAS VERBAL REASONING
<b>97</b>	<b>137</b>	<b>L</b>	<b>WRAT WORD READING</b>
92	128	L	WRAT SPELLING
91	127	R L	WRAT SENTENCE COMPREHENSION

## 7. WORK HISTORY & TRANSFERABLE SKILLS:

At age 12, Client started working in her parents' plant nursery. She continued this on a part-time/seasonal basis for the next five **(5) years**. At age 16, she started part-time seasonal work in her grandfather's hardware store, where she remained for two **(2) years**. At age 18 she went on to work at *(redacted)* Hardware, as a part-time Cashier. After a year, she left for a better-paying position as a part-time Runner, at a law office. She remained here for two **(2) years**, before leaving, at age 21, to take a full-time job as a Legal Secretary. After two **(2) years**, Client left to take a similar position at a law firm in Orlando, near her school, but was "laid off", after about a year.

At age 24, Client graduated from college, and was hired to work in an Orlando law firm, as a full-time Paralegal. She remained here for the next three **(3) years**, before leaving to take a position as Paralegal & Director of Legal Services, at another firm. This position, which featured better pay and no fixation with "billable hours", ended when the firm closed, after about a year. At age 28, Client took a full-time Paralegal job, working with *(redacted)* Hotels' in-house counsel. She stayed in this position for about three **(3) years**, before leaving for better pay at an Orlando corporate & trademark law firm. She stayed with them for three **(3) years**, before being "laid off". At age 34, Client went to work for another corporate & trademark law firm, where she also focused on estate planning. She remained here for the next six **(6) years**, before leaving to work in her family's medical marijuana business, where she focused on inventory management and regulatory compliance. She remained in this role for about a year, before the business was sold. At age 41, Client took a full-time job in the *(redacted)* County Clerk's office, where she remained for about a year, before being "laid off". Client indicated that she would likely relocate and/or tolerate deployment of any duration/frequency, for the right position. Based upon interview responses, Client's qualified work history appears to include key tasks associated with the following job titles:

DOT Code	Job Title	VQ	SVP	Skill Level	VA	VIPR
201.362-010	Legal Secretary	117.94	6	Skilled	76%	ESFJ
119.267-026	Paralegal	110.87	7	Skilled	79%	INFP
119.267-028	Paralegal	110.87	7	Skilled	79%	INFP
243.367-018	Town Clerk	108.70	5	Semi-Skilled	77%	ESTP
211.462-014	Cashier-Checker	103.06	3	Semi-Skilled	69%	ESFP
222.387-026	Inventory Clerk	100.34	4	Semi-Skilled	64%	ISFP
205.367-042	Registration Clerk	98.88	3	Semi-Skilled	69%	ISTJ
279.357-050	Salesperson, General Hardware	97.43	4	Semi-Skilled	80%	ESTP
239.567-010	Office Helper	89.92	2	Unskilled	62%	ESFP
405.687-014	Horticultural Worker II	86.90	2	Unskilled	67%	ISFP

The vocational diagnosis and assessment of residual employability (VDARE) method was employed to establish Client's transferable skills, via the McCroskey Vocational Quotient System. Job definitions associated with Client's work history can be readily accessed by entering the associated DOT number (xxx.yyy-zzz) into any online search engine or entering the job title into *mynextmove.org*. In addition to the SVP (Specific Vocational Preparation), MTEWA (Machines, Tools, Equipment and Work Aids) and MPSMS (Secondary Materials, Products, Subject Matter and Services) obviously associated with job titles in Client's work history, analysis of transferable skills (TSA) from previous qualified employment suggests experience with: copying, compiling, computing, comparing & analyzing **data**; taking instructions from, helping, speaking with, signaling & persuading **people**; and handling, operating &

controlling **things**. *See Appendix 2 for transferable skills associated with Client's DOT Job Titles.* Client said she has done some **bookkeeping**, at her church. She has also done some **inventory-control** (hemp products), but no shipping/receiving. She has extensive experience with **scheduling**, via her legal experience, and she has **supervised** up to two **(2) personnel**, at a time. Client has both individual **(1-1) on-the-job training** experience, and she has conducted **individual & group briefings** for up to about **40 personnel** at a time, on the topic of estate planning. Client has used computers, on the job, quite extensively, including all **MS Office** applications and some **specialized legal and inventory apps**. She has used a **farm tractor**, but no heavy construction equipment. Client claimed familiarity with all hand & power **tools** used in auto maintenance, as well as multimeters and **some machine-shop** tools. She is a renowned **boat racer**; the only female ever to win a division championship in the *(redacted)* category, which she did twice. She raced from 2006 to 2021 before retiring, due to injuries. The fastest vehicle she has driven was an **E Econo Boat**. The largest vehicle she has driven was a **Class-A RV**.

## 8. INTEREST-BASED WORK PERSONALITY:

The McCroskey Vocational Quotient System (MVQS)Vocational Interest and Personality Reinforcer (VIPR) survey, which produces a Meyers-Briggs Code, was administered, in order to obtain an estimate of Client's vocational interest pattern and work personality. This instrument matches individuals with specific job types, based on their vocational interests, occupational values, needs, and general Jung people-based personality type.

Client's VIPR-Type was found to be **ESTP (Extraversion, Sensing, Thinking, Perceiving)** – **"The Entrepreneur/ Promoter/Negotiator"**. Personnel sharing this interest-based work-personality profile are often described with terms such as **action-oriented, competitive & self-confident**. ESTPs often excel in **crisis management, sales and promotional** activities. They are nothing if not **adaptable** and often can be found among the ranks of **willing risk-takers**. **Attention to detail** is often one of their key employability attributes.

Careers usually found to be most attractive to ESTPs include: **marketing, skilled trades, and various business positions, as well as law enforcement, and technically oriented occupations**. In the lower echelons, they fill the ranks as **carpenters, craftsmen, farmers, laborers, transportation workers and factory workers**. *Of course, a variety of other factors, such as education, aptitude, physical capacity: psychological factors and labor market access, bear on the potential for success in these occupations.*

### 1. Energizing: **15/12**

**(E)xtraversion** - Preference for drawing energy from the outside world of people, activities or things.  
**(I)ntroversion** - Preference for drawing energy from one's internal world of ideas, emotions, or impressions.

### 2. Attending: **17/10**

**(S)ensing** - Preference for using the five senses to define reality.  
**i(N)tuition** - Preference for using the imagination to envision what is possible.

### 3. Deciding: **14/13 (nearly equivalent)**

**(T)hinking** - Preference for organizing and structuring information to decide in a logical, objective way.  
**(F)eeling** - Preference for organizing and structuring information to decide in a personal, value-oriented way.

### 4. Living: **8/19 (well differentiated)**

**(J)udgement** - Preference for a planned and organized life.  
**(P)erception** - Preference for a spontaneous and flexible life.

## 9. OCCUPATIONAL VALUES & NEEDS:

The Occupational Values and Needs Inventory (OVNI) was administered to obtain an estimate of Client's vocationally-relevant perceived values and needs. This is a self-rating instrument which profiles the individual's preferences, in terms of 20 specific job-related reinforcers. This profile is then used to match the individual with specific job types, based on work values ("global aspects of work that are important to a person's satisfaction"), published by the U.S. Department of Labor. Client chose **working conditions & morality** as her most important work-life values, followed closely by ability utilization, achievement, independence, security, advancement, co-workers, social service, company policies, quality supervision, creativity & responsibility. Autonomy, compensation & recognition were assigned a neutral rating, by Client, with **variety, authority & social status** registering as least important, to her.

## 10. ESTIMATED GENERAL COGNITIVE APTITUDE LEVEL:

$$GCA = 48^{th} \text{ Percentile /Average}$$

Client's general cognitive aptitude (learning ability) was estimated via averaged GATB scores of tests which involve reasoning. Intelligence quotient is best measured by a Licensed Psychologist, using an instrument such as the Wechsler Adult Intelligence Scale (current version).

## 11. ESTIMATED ACADEMIC BASIC SKILLS ACHIEVEMENT LEVELS:

Academic basic skills achievement levels are estimated through the use of the Wide-Range Achievement Test V (WRAT):

Grade Level	Name of Test or Subtest
12.9+ (est.18.5)	WRAT Word Reading
12.9+ (est.16.0)	WRAT Sentence Comprehension
12.9+ (est.16.5)	WRAT Spelling
8.0	WRAT Math Computation

## CLIENT'S VOCATIONAL INTEREST STATEMENT

When asked about her career thoughts, Client mentioned **legal research**, as long as it involves **limited math** requirements. Regarding her past jobs, Client said she most enjoyed the **research & compliance** aspects of her work, especially in the area of **trademark law**, but she did not appreciate some aspects of the interpersonal **"atmosphere" in some big law firms**.

Of the 35 job titles found to be most closely related to Client's expressed career interests, the following 17 (many of which are among those recommended for consideration) fall within the most critical aptitude, physical-functional capacity & environmental tolerance parameters of her worker-trait profile:

DOT Code	Job Title	VQ
162.267-010	Title Clerk	118.2435
169.267-034	Research Analyst	115.3009
199.267-034	Research Assistant II	114.6273
169.167-014	Administrative Secretary	113.4514
186.167-010	Estate Planner	113.4514

(continued)



DOT Code	Job Title	VQ
052.067-018	Genealogist	110.9829
119.267-026	Paralegal	110.8747
119.267-028	Paralegal	110.8747
168.267-014	Claim Examiner	109.8141
119.267-018	Contract Clerk	109.0251
119.267-022	Legal Investigator	109.0251
243.362-010	Court Clerk	108.8889
119.267-010	Abstractor	108.6534
119.287-010	Title Examiner	108.6534
186.167-038	Mgr, Land Leases/Rentals	108.5772
209.367-046	Title Searcher	92.6292

*Notes: VQ = Vocational Quotient, which is an indicator of job difficulty (Mean=100; SD=15). Job definitions can be accessed by entering the DOT Code into any search engine.*

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## **PHASE II: COMMUNITY-BASED SITUATIONAL ASSESSMENT (CBSA)**

Note: A modified version of the “Methods-Time-Measurement” paradigm, borrowed from industrial psychology, is employed to estimate task proficiency. For example, **50/75 MTM** indicates that the Client's effort produced results that would satisfy only about half of the minimal commercially competitive work-product quality standard, and was accomplished at a substandard rate - only about 3/4 as fast as would be considered minimally viable, in a commercially competitive environment. On a letter-grade scale, MTM scores are represented as follows: **100=A; 90=B; 80=C; 70=D; 60=F**.

### **SCENARIO**

You have been tentatively selected to fill a well-paid position with a firm that is staffing up in anticipation of a classified government contract. You will be hired to fill this position, if your performance of the duties you will be assigned, today, is satisfactory.

Today, you will participate in a situational assessment, designed to reflect the duties of the position you are being considered for. Since the nature of the actual job is classified, you are being evaluated on your performance of similar duties, executed in the context of a public library.

You will be rated, by an Examiner, on the following factors, using a four-point grade-scale (ABCD): attention; attitude; adherence to instructions; cooperation; effort; emotional response; endurance; enthusiasm; flexibility; initiative; learning; motivation; organization; pace; perseverance; recall; social skills; task approach; and verbal comprehension & expression (both oral & written). What are your questions?

**Task One - Book Bags:** You will retrieve designated library materials, and bring them to the conference room. These materials will consist of 8 hard-cover books (all about the same size), 8 paperback books (all about the same size), and 8 CD-ROMS. You will assemble 8 stacks of library materials, each containing one hard copy, one paperback and one CD-ROM, in that order...neatly arranged in two equal rows of stacks, on the work table. Then you will prepare a numbered list of titles of the items in the 8 stacks of library materials, numbered left to right, top to bottom. Easily recognizable abbreviations are permitted. After that, the 8 stacks of library materials will be loaded into 8 plastic bags (provided). The bags will be numbered 1-8, left to right and top to bottom. The contents of each numbered bag must correspond to the list. The bags will be very neatly displayed, placed in a uniform manner. Bags and rows must be uniformly spaced. The display must present an extremely trim and uniform appearance. Upon notification that the display is ready, Examiner will designate a number of random bags to be spot checked against the list. You will pull the materials from these bags and display them, as directed by Examiner, and hand Examiner the list. Once Examiner has checked the Q/A sample against the list, you will disassemble the display and take appropriate steps to ensure that the materials are replaced properly.

**Task Two - Library Volunteer Program:** Brief Examiner on the library volunteer program. This briefing shall include (but is not limited to) information about: qualification requirements; the duties of volunteers; and how to enroll in the volunteer program.

**Task Three - Schematic Diagram:** Present Examiner with a simple diagram (a floor plan, not a scaled drawing) of the designated portion of the library. This diagram will contain schematic representations of features, rather than realistic pictures. Proportions can be roughly estimated, rather than drawn to scale. This diagram will show all functional features, such as entrances, service desks, tables, computer terminals, bookshelves, restrooms, service areas, etc. All displayed features will be neatly and legibly labeled.

**Task Four - Job-Search Tips:** Using print and digital library resources, find the best definition of "job-search tips", and then prepare a list of the ten most useful job-search tips. Brief Examiner on these ten job-search tips.

**Task Five - Book Summaries:** Prepare brief written summaries of three hard-cover books, abstracted from information on book jackets. These summaries shall not exceed two sentences in length. Each summary shall be preceded by the title and author of the book. The summaries will be orally briefed to Examiner, after he is presented with the book.

### **OBSERVATIONS**

Client comfortably completed all five Phase II tasks within the 4-hour time limit. At the end of the assessment session, she gave no behavioral or expressive indication of a level of fatigue which would keep her from completing for a full 8-hour workday. Client manifested a commendable level of **stress-tolerance**, as she dealt with the operational quality/time standards that she encountered in both Phase I & Phase II tasks. She never "broke stride" as she calmly worked to dispatch each requirement, as it emerged. Likewise, she **never complained** (or even remarked) about the demanding nature of some of the tasks, either during or after their execution. At the end of the assessment, when asked if it (Phase II) felt like a job to her, she simply replied: *"Well, it just felt like a bunch of tasks"*.

**Task One - Book Bags:** After the orientation briefing, when asked if she had any questions, Client reviewed her notes (see Exhibits #1,2) aloud, and queried Examiner for confirmation. Her notes were quite detailed and substantially accurate. When selecting materials from the library shelves, Client independently used the first book she selected to gauge the dimensions of her subsequent selections, in order to address the uniformity criteria of Task One.

When she started laying out the display, Client initially began to prepare one row of eight, rather than two rows of four, as specified in the orientation. She quickly corrected this **error** when it was called to her attention. Then, without being prompted, Client used a book to gauge the distance between each stack in the display. Her understanding of task-standards and her attention to detail would be obvious to any observer. She was readily compliant with Examiner's guidance & suggestions (though such was seldom required) and she took the **initiative** to independently "double-check" her work, at logical junctures. After building the eight stacks to standard, she cleverly obtained title & author information from the spine, rather than removing & replacing each item in each stack (which is what most examinees do). Her list was well-organized, thorough and legible (see Exhibit #3). After Examiner bagged the first stack in the display, to demonstrate the technique and standard, Client bagged the second stack to an MTM of about 85/100 (quickly, but with a slight **error**). When this was pointed out to her, she quickly re-bagged the stack to standard and then repeated the process six more times. On one subsequent stack, she let the printing on the bag show – an additional **error**. When this was pointed out, she quickly & correctly re-bagged the stack, hiding the printing. She numbered the bags (neatly printed and with correct placement) and then she prepared a legible and accurate list; easily a **95/100 MTM** outcome of Task One. Notably, Client responds readily to corrections. She is emotionally stable, and not easily distracted.

### **Task Two - Library Volunteer Program:**

Client approached library staff **confidently**, and in short order explained her need and obtained the three elements of information specified in the Task 2 summary (see Exhibit #4). After briefing Examiner on the results, she was confronted with an unscheduled requirement: "Find out if a background check is required, and if so, who pays for it". With no outward sign of frustration, Client returned to the front desk and made this inquiry, demonstrating **resilience**. Afterward, she completed her notes and briefed Examiner on her findings in a thorough and efficient manner. (**100/100 MTM**)

### **Task Three - Schematic Diagram:**

Client was advised to consider producing a preliminary rough draft of the schematic (floor plan) of the second floor of the library, after which she could sit and complete a pen & ink draft. Instead, she produced a pencil and opted to go around the library, making only one draft (see Exhibit #5); correcting proportions and placement of elements as she went. (This is interpreted as another indication of **initiative**, independence and self-confidence.) She returned, after an average interval, with a schematic that was consistent with the published standards. Client was then confronted with another unscheduled requirement: to label each section of the library according to its contents. With no hesitation or expression of frustration, she quickly went around and posted the required information to the schematic (another indication of **resilience**). Her guided tour was executed competently. She had to be reminded only once to orient the floor plan to the ground as she briefed Examiner in the "walk-around". Client's only substantive **error** was that she failed to properly label the computer section, so her final score for Task #3 registered at **95/100 MTM**.

### **Task Four - Job-Search Tips:**

Client **missed** Examiner's remark (after the 5 tasks were read to her) that she could find career information in the 650 section of the non-fiction stacks. So, she initially went to the card catalog, but realized that, without an author or title, she would have a difficult time locating the target material. She looked stumped for a moment, but then approached staff with her problem, and was soon guided to the 650 section. She selected two suitable titles and started perusing one of them from the front, page by page. Soon, she turned to the index, and located job-search tips. She went straight to the index, on the second book, and then had no problem finding a suitable online resource.

She copied the list of ten tips from the web-page, and handed them to Examiner (an *error*), who reiterated the requirement that she employ “print and digital” resources to prepare “her” best list of 10 JS tips. With no discernible reaction, she returned to the task and executed it rapidly & competently (see Exhibit #6). When Examiner lectured on interview preparation, Client took notes, without being instructed to do so (thus showing *initiative*). Her final score for Task #4 was **90/100 MTM**.

#### **Task Five - Book Summaries:**

Client rapidly executed Task #5 to standard. Her book summaries were excellent (see Exhibit #7) and her briefing concise and coherent. (**100/100 MTM**)

### **SUMMARY**

This evaluation is made relative estimated U.S. adult general population estimated norms. Overall rating is computed on the 4.0 grading system.

<b>Element</b>	<b>Rating</b>	<b>Comment</b>
Attention	B 3.0	Rarely missed something; No significant deficiency detected
Attitude	B+ 3.5	Positive, workmanlike task approach, with no exception
Cooperation	A 4.0	Uniformly cooperative, from beginning to end
Emotional Stability	A 4.0	No sign of instability, including under induced stress
Endurance	A 4.0	Never waived; Appeared able to continue to the end of 8-hr. shift
Enthusiasm	C 2.0	No indication of +/- enthusiasm; Flat emotional response style
Flexibility	A 4.0	Readily adapted to unanticipated change on several occasions
Initiative	A 4.0	Comfortably took initiative on several occasions
Learns Quickly	A 4.0	Demonstrated rapid learning, as expected of a college graduate
Oral Expression	B+ 3.5	Uniformly economical & coherent verbal style; Perhaps a little flat
Org. of Task/Time	A 4.0	Effortlessly organized her activities to accomplish tasks efficiently
Pace	A 4.0	Unhurried but consistently productive pace
Perseverance	A 4.0	Overcame unexpected obstacles, on several occasions
Personality	C 2.0	No creditable flaws; Able to engage effectively; Perhaps a little flat
Recalls Instructions	B+ 3.5	Good working memory; Accurate recall, w/very few exceptions
Self Confidence	A 4.0	Confidently initiated all actions and staff communications
Semi-Skilled Work	B+ 3.5	Manipulated material as required to meet the requirement
Social Skills	A 4.0	Calmly efficient style of communication enhanced productivity
Task Approach	A 4.0	Extremely well organized & highly efficient; “Schooled”
Skilled Work	A 4.0	Expertly acquired, organized, analyzed & communicated data
Written Production	A 4.0	Consistent with her college-graduate & professional experience
<b>Overall Rating</b>	<b>B+ 3.6</b>	<b>Professional-level skilled work ability; <i>Affect perhaps a bit flat</i></b>

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### **THE JOB-MATCHING ANALYSIS & SYNTHESIS**

The following data are based upon an analysis of Client’s worker-traits, in comparison with worker-trait requirements typically associated with locally hired-for job titles, as published by the U.S. Department of Labor.

These worker-traits include: basic academic skill levels; vocationally-relevant aptitudes (learning abilities); coordination & dexterity data; disability data; physical-functional & environmental-tolerance restrictions. Other factors taken into consideration include: Client's mental health & other medical data; Client's expressed interests & occupational preferences; transferable skills from work-history; vocational interest patterns; work-personality profile; local labor-market data; and other vocationally-relevant factors. The result is a synthesis of potentially suitable vocational options.

## HOW TO READ THE JOB-MATCH LIST

The McCroskey Vocational Quotient System (MVQS) was employed to compare Client's Transferable Skills and Worker Trait Profile with the corresponding characteristics, associated with selected job titles from the U.S. Department of Labor's Dictionary of Occupational Titles. The output of this process, known as the Job-Match List, features the following information:

**DOT** – Dictionary of Occupational Titles code

**VQ** – Vocational Quotient: An indicator of job difficulty

**TS** – Transferable Skills Percentage

**VA** – Occupational Values & Needs Agreement

**VIPR**- Work-Personality Type

**SVP** – Specific Vocational Preparation: 1= Short Demo Only; 2 = Up to 30 Days; 3 = 30 to 90 days; 4 = 90 to 180 days; 5 = 6 to 12 months; 6 = 1 to 2 years (Cert./AA/AS); 7 = 2 to 4 years (AA/AS/BA/BS); 8 = 4 to 10 years (MA/MS/PhD/MD); 9 = over 10 years (Post-Doc. & some Board Certifications).

**Ratings** at critical level (VQ=**103/110**;TS **=/40/60**;VA%**=/70/80**) are bolded; VIPR=**ENFP**.

**VIPR** = ESTP & ESFP are bold/highlighted; **VIPR** = Any 3 of ESTP & ESFP are bolded.

**Titles** containing 4 bolded (or 3 bold/highlighted) values are bold/highlighted.

**Titles** containing 3 bolded (or 2 bold/highlighted) values are bolded.

## RECOMMENDED VOCATIONAL OPTIONS

**Labor-Market Data:** Local wage, growth and openings data are based on employment projections published by the Florida Department of Economic Opportunity (FLDEO). Employer names can be drawn from a variety of online resources, including the Florida Research and Economic Information Database Application (FREIDA). The corresponding SOC (ONET) Occupation, with SOC Code and (quarterly-updated) local labor-market data is positioned directly below the DOT Job Title(s). Based upon labor market research (LMR), using the Florida Department of Economic Opportunity (**FLDEO**) Employment Projections, the "Occupations" (***crosswalked from the selected D.O.T. job titles***) were found to project local openings, over the 2024-2032 period. Note: In this case, "local" means Workforce Region 12 (CareerSource Central Florida). **Bolded** data are more significant. **Highlighted** data are most significant.

Potentially Suitable Local Occupations (w/SOC Code)	2023 Entry Wage	2023 Exp.. Wage	2024-2032 Growth Rate%	Local Openings	Tng Rqmt
6,7	1	2	3	4	5

Notes:

1. Entry Wage figures => **\$16/hour** are bolded; => **\$19/hour** are also highlighted.
2. Experienced Wage figures => **\$26/hour** are bolded; => **\$42/hour** are also highlighted.
3. Growth rates => **8%** are bolded.; => **10%** are also highlighted.
4. Annual openings => **1K** are bolded; => **6K** are also highlighted.
5. Training Requirements (see \* below)
6. **Titles** featuring 3 bolded values are bolded.
7. **Titles** featuring 4 bolded values are bold/highlighted.

**\* Training Requirements:**

A: associate degree

B: bachelor's degree

HS: high school diploma or GED

M+: master's, doctoral or professional degree

NR: no formal educational credential required

PS: postsecondary non-degree award

PS: postsecondary non-degree award

*Note: The specific DOT job title falls within the more general SOC occupation title. Note: See Appendix 1 for definitions of codes & values as well as text-formatting criteria. Job definitions can be accessed by entering the DOT Code into any search engine. For more detailed information about jobs, enter the job title into [www.mynextmove.org](http://www.mynextmove.org).*

**PRIMARY**

DOT Code	Job Title	VQ	SVP	TS	VA	VIPR
<b>169.267-034</b>	<b>Research Analyst (Insurance)</b>	<b>115.30</b>	8	<b>60%</b>	<b>85%</b>	<b>ESTJ</b>

  

Potentially Suitable Local Occupations (w/SOC Code)	2023 Entry Wage	2023 Exp.. Wage	2024-2032 Growth Rate%	Local Openings	Tng Rqmt
<b>Market Research Analysts (131161)</b>	<b>\$16.08</b>	<b>\$37.96</b>	<b>08.8</b>	<b>8,482</b>	B

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DOT Code	Job Title	VQ	SVP	TS	VA	VIPR
<b>186.167-010</b>	<b>Estate Planner (Insurance)</b>	<b>113.45</b>	7	<b>40%</b>	<b>77%</b>	<b>ENTP</b>

Potentially		2023	2023	<u>2024-2032</u>		
Suitable Local		Entry	Exp..	Growth	Local	Tng
Occupations (w/SOC Code)		Wage	Wage	Rate%	Openings	Rqmt
<b>Insurance Sales Agents (413021)</b>		<b>\$20.74</b>	<b>\$42.00</b>	<b>10.2</b>	<b>6,807</b>	<b>PS</b>

### ALTERNATES

DOT Code	Job Title	VQ	SVP	TS	VA	VIPR
<b>162.267-010</b>	<b>Title Clerk</b>	<b>118.24</b>	6	<b>40%</b>	<b>75%</b>	INFJ
<b>119.267-010</b>	<b>Abstractor</b>	<b>108.65</b>	6	<b>85%</b>	<b>85%</b>	INFP
<b>119.287-010</b>	<b>Title Examiner</b>	<b>108.65</b>	7	<b>80%</b>	<b>75%</b>	INFP
<b>209.367-046</b>	<b>Title Searcher</b>	92.63	5	<b>80%</b>	<b>77%</b>	<b>ESFP</b>

Potentially		2023	2023	<u>2024-2032</u>		
Suitable Local		Entry	Exp..	Growth	Local	Tng
Occupations (w/SOC Code)		Wage	Wage	Rate%	Openings	Rqmt
<b>Title Examiners, Abstractors &amp; Searchers (232093)</b>		<b>\$17.19</b>	<b>\$25.82</b>	<b>10.5</b>	923	<b>PS</b>

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DOT Code	Job Title	VQ	SVP	TS	VA	VIPR
199.267-034	Research Assistant II	<b>114.63</b>	6	23%	<b>77%</b>	ENTJ

Potentially		2023	2023	<u>2024-2032</u>		
Suitable Local		Entry	Exp..	Growth	Local	Tng
Occupations (w/SOC Code)		Wage	Wage	Rate%	Openings	Rqmt
Teaching Assistants, Postsecondary (119199)		\$15.49	<b>\$30.53</b>	04.7	570	B

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DOT Code	Job Title	VQ	SVP	TS	VA	VIPR
<b>119.267-026</b>	<b>Paralegal</b>	<b>110.87</b>	7	<b>97%</b>	<b>79%</b>	INFP
<b>119.267-028</b>	<b>Paralegal</b>	<b>110.87</b>	7	<b>97%</b>	<b>79%</b>	INFP
<b>119.267-022</b>	<b>Legal Investigator</b>	<b>109.03</b>	7	<b>90%</b>	<b>86%</b>	INFP

Potentially		2023	2023	<u>2024-2032</u>		
Suitable Local		Entry	Exp..	Growth	Local	Tng
Occupations (w/SOC Code)		Wage	Wage	Rate%	Openings	Rqmt
<b>Paralegals &amp; Legal Assistants (232011)</b>		<b>\$19.62</b>	<b>\$29.59</b>	<b>11.6</b>	<b>6,601</b>	<b>A</b>

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DOT Code	Job Title	VQ	SVP	TS	VA	VIPR
169.117-014	Grant Coordinator	110.52	8	23%	81%	INFP

Potentially		2023	2023	2024-2032		
Suitable Local		Entry	Exp..	Growth	Local	Tng
Occupations (w/SOC Code)		Wage	Wage	Rate%	Openings	Rqmt
Business Operations Specialists, All Other (131199)		\$18.15	\$26.67	08.7	7,844	B

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DOT Code	Job Title	VQ	SVP	TS	VA	VIPR
162.117-014	Contract Administrator	110.26	8	20%	80%	ESFJ

Potentially		2023	2023	2024-2032		
Suitable Local		Entry	Exp..	Growth	Local	Tng
Occupations (w/SOC Code)		Wage	Wage	Rate%	Openings	Rqmt
Purchasing Managers (113061)		\$38.32	\$63.75	08.1	396	B

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DOT Code	Job Title	VQ	SVP	TS	VA	VIPR
219.362-010	Administrative Clerk	110.18	4	46%	77%	ESFP
205.367-010	Admissions Evaluator	102.30	6	63%	77%	ESFP

Potentially		2023	2023	2024-2032		
Suitable Local		Entry	Exp..	Growth	Local	Tng
Occupations (w/SOC Code)		Wage	Wage	Rate%	Openings	Rqmt
Office Clerks, General (439061)		\$14.36	\$22.92	09.0	32,250	PS

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DOT Code	Job Title	VQ	SVP	TS	VA	VIPR
186.267-026	Underwriter, Mortgage Loan	110.09	8	23%	76%	ESTJ

Potentially		2023	2023	2024-2032		
Suitable Local		Entry	Exp..	Growth	Local	Tng
Occupations (w/SOC Code)		Wage	Wage	Rate%	Openings	Rqmt
Loan Officers (132072)		\$16.21	\$42.51	00.6	1,780	B

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DOT Code	Job Title	VQ	SVP	TS	VA	VIPR
168.267-014	Claim Examiner	109.81	7	23%	74%	ESTJ
241.267-018	Claim Examiner	106.47	7	40%	79%	ENTJ

Potentially		2023	2023	2024-2032		
Suitable Local		Entry	Exp..	Growth	Local	Tng
Occupations (w/SOC Code)		Wage	Wage	Rate%	Openings	Rqmt
Claims Adjusters, Examiners & Investigators (131031)		\$35.93	\$43.83	10.0	2,489	PS

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DOT Code	Job Title	VQ	SVP	TS	VA	VIPR			
<b>119.267-018</b>	<b>Contract Clerk</b>	<b>109.03</b>	<b>7</b>	<b>87%</b>	<b>76%</b>	<b>INFP</b>			
Potentially					2023	2023	<u>2024-2032</u>		
Suitable Local					Entry	Exp..	Growth	Local	Tng
<u>Occupations (w/SOC Code)</u>					<u>Wage</u>	<u>Wage</u>	<u>Rate%</u>	<u>Openings</u>	<u>Rqmt</u>
Legal Support Workers, All Other (232099)					\$13.40	\$21.27	06.6	341	A

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DOT Code	Job Title	VQ	SVP	TS	VA	VIPR			
<b>243.362-010</b>	<b>Court Clerk</b>	<b>108.89</b>	<b>6</b>	<b>71%</b>	<b>76%</b>	<b>INTP</b>			
Potentially					2023	2023	<u>2024-2032</u>		
Suitable Local					Entry	Exp..	Growth	Local	Tng
<u>Occupations (w/SOC Code)</u>					<u>Wage</u>	<u>Wage</u>	<u>Rate%</u>	<u>Openings</u>	<u>Rqmt</u>
Court, Municipal & License Clerks (434031)					\$14.96	\$23.79	07.0	<b>1,856</b>	HS

**For Potential Local Employers – follow this procedure:**

1. Go to <http://freida.labormarketinfo.com/>
2. Select “Services For Individuals” from blue bar at top of screen.
3. Select “Job Seeker Services”
4. Select “Employer Search by Occupation”
5. Click on Florida; Area Type (County); Specific Area (Your County Name)
6. Click on the Letter that your target Occupation begins with.
7. Select the Industry Type of interest.
8. Click on the Company Name, for contact information.

**For Current Openings - go to the following URLs:**

<http://www.employflorida.com/jobbanks/>  
<http://www.thecareerindex.com>  
<http://www.careerbuilder.com>  
[http://\(labor market of interest\).craigslist.org/jjj/](http://(labor market of interest).craigslist.org/jjj/)

## **ACCOMMODATIONS**

While all recommended job titles fall within Client’s residual functional capacity parameters, according to the USDOL’s Dictionary of Occupational Titles (DOT), there may be duties, unique to particular positions, which exceed Client’s profile. In such cases, arrangements may be required which provide reasonable accommodation, with respect to Client’s functional restrictions.

While a job analysis would be required to determine what specific accommodations might be suitable to the position that Client is hired for, here follows some options for consideration:

**Training:** Client should contact the school's Disabled Student Advisor, with respect to determining what training accommodations might be made available. Client may require: **additional time** to complete assignments and tests; **transcripts** of lectures; and **preferential seating**. Another category of accommodation might be the ready availability of specially designed **graphic and verbal memory aids**, during both training and actual work. Client may require **additional time**, as well as **tutoring**, to consolidate learning, and complete assignments, whether in institutional or on-the-job training. Other accommodations may include the use of a **audio/video recording**, as a memory aid, during classes, training sessions, meetings and (group or individual) briefings; a copy of **training or briefing outline and other references**; alteration of **exam format** from confrontational naming or essay to multiple choice or true-false; use of computer software programs or other **technological assistance to supplement memory** and other affected cognitive functions; extended **exam time and/or segmented exams**; providing **multimedia training and testing**, including oral/auditory, written, and (if possible) graphic; considering **modifications, substitutions, or waivers of courses**, on a case-by-case basis; providing, so far as is reasonable, for job-carving, and **re-distribution/modification of assignments**, in the workplace; providing **maps, diagrams, and special markings**, to assist help Client feel more confident in his ability to negotiate the training or work environment, in the early stages of adjustment; if possible and helpful, ask the training facility to declare Client a **“full-time”** student even if he is part-time, inasmuch as the effects of his disability are such that a part-time load is equal in burden to a full time load for a student without disability. Also, if Client has finished most of the coursework, but is unable to complete the remainder before the semester’s end, it may be advantageous to negotiate an **“incomplete”**, rather than a failing mark, if it means that he will not have to repay tuition or retake the entire course in order to finish.

**Work:** While all recommended job titles fall within Client’s residual physical functional capacity parameters, according to the USDOL’s Dictionary of Occupational Titles (DOT), there may be duties, unique to particular positions, which exceed Client’s profile. In such cases, arrangements may be required which provide reasonable work accommodations, with respect to Client’s functional restrictions. For instance, plans will have to be in place, which enable Client to obtain assistance in tasks that involve dealing with **stressors**, such as overwhelming **production and/or work-rate** requirements, **deadlines**, etc. People with TBI may require some of the accommodations, discussed below, but seldom need all of them. The following is only a sample of the possibilities available. Numerous other accommodation solutions may exist.

### **Physical Limitations:**

- Install ramps, handrails, and provide handicap parking spaces
- Install lever style door handles
- Clear pathways of travel of any unnecessary equipment and furniture

### **Maintaining Stamina During the Workday:**

- Permit flexible scheduling, allow longer or more frequent work breaks
- Provide additional time to learn new responsibilities
- Provide self-paced workload
- Provide backup coverage for when the employee needs to take breaks
- Allow for time off for counseling
- Allow for use of supportive employment and job coaches
- Allow employee to work from home during part of the day
- Provide for job sharing opportunities & part-time work schedules

**Maintaining Concentration:**

- Reduce distractions in the work area
- Provide space enclosures or a private office
- Allow for use of white noise or environmental sound machines
- Allow the employee to play soothing music using a cassette player and headset
- Increase natural lighting or provide full spectrum lighting
- Reduce clutter in the employee's work environment
- Plan for uninterrupted work time
- Divide large assignments into smaller tasks and steps
- Restructure job to include only essential functions

**Difficulty Staying Organized and Meeting Deadlines:**

- Make daily TO-DO lists and check items off as they are completed
- Use several calendars to mark meetings and deadlines
- Remind employee of important deadlines via memos or e-mail or weekly supervision
- Use a watch or pager with timer capability
- Use electronic organizers
- Divide large assignments into smaller tasks and steps
- Assign a mentor to assist employee in determining goals and provide daily guidance
- Schedule weekly meetings with supervisor, manager, or mentor to determine if goals are being met

**Memory Deficits:**

- Allow the employee to tape record meetings
- Provide type written minutes of each meeting
- Use notebooks, calendars, or sticky notes to record information for easy retrieval
- Provide written as well as verbal instructions
- Allow additional training time
- Provide written checklists and use color-coding to help identify items
- Post instructions close to frequently used equipment

**Problem Solving Deficits:**

- Provide picture diagrams of problem solving techniques, e.g., flow charts
- Restructure the job to include only essential functions
- Assign a supervisor, manager, or mentor when the employee has questions

**Working Effectively with Supervisors:**

- Provide positive praise and reinforcement
- Provide written job instructions
- Write clear expectations of responsibilities and the consequences of not meeting them
- Allow for open communication with managers and supervisors
- Establish written long term and short term goals
- Develop strategies to deal with problems before they arise
- Provide written work agreements
- Develop a procedure to evaluate the effectiveness of the accommodation

### Difficulty Handling Stress and Emotions:

- Provide praise and positive reinforcement
- Refer to counseling and employee assistance programs
- Allow telephone calls during work hours to doctors and others for needed support
- Provide sensitivity training to coworkers
- Allow the employee to take a break as a part of a stress management plan

### Attendance Issues:

- Provide flexible leave for health problems
- Provide a self-paced work load and flexible hours
- Allow employee to work from home
- Provide part-time work schedule

### Issues of Change:

- Recognize that a change in the office environment or of supervisors may be difficult for a person with a brain injury
- Maintain open channels of communication between the employee and the new and old supervisor in order to ensure an effective transition
- Provide weekly or monthly meetings with the employee to discuss workplace issues and productions levels

(source: askjan.org)

Job-search and/or job development activities will need to take into account Client's functional restrictions, and not target positions which involve critical duties that exceed Client's restrictions, and cannot be accommodated.

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### **TRAINING POTENTIAL ESTIMATE**

The following estimates are provided with the assumption that Client's performance, as referenced in this assessment, is generally representative of current capabilities. Client achieved **above-average scores in all verbal tests**, as well as a test of **quantitative reasoning**. This latter result (96%ile on the EAS Numerical Reasoning test) suggests that, with limited remedial effort (perhaps 6-12 months of self-guided math remediation through online resources such as Khan Academy), she could raise her **(GL 8.0) math** computation ability from the current level to GL 12.9+. Client's superb verbal scores (ranging from 91%ile in Sentence Comprehension and 92%ile in Spelling to 97%ile in Word Reading) are consistent with her ambition to do legal research, as well as graduate training in legal and related fields. Provided full accommodation and implementation of recommended supportive measures, and with the requisite means & motivation, the likelihood of Client successfully completing additional specific vocational preparation (SVP) is estimated to be: **EXCELLENT** for extensive, formal OJT/apprenticeship, lasting up to two (2) years, as well Certificate & Associate's Degree training, characteristic of low to mid-level skilled (SVP 5,6) occupations; **GOOD to EXCELLENT** for very extensive (up to four years) formal OJT/apprenticeship training, and Bachelor's Degree programs, leading to qualification for the highest echelon of skilled (SVP 7) occupations.

Regarding graduate-level training, Client's outlooks seems to be **FAIR to GOOD** for a Master's Degree as well as some Ph.D. programs, leading to 2nd tier "highly skilled" (SVP 8) occupations, but her prospects for successful completion are rated as **GUARDED to FAIR** for the most demanding professional training programs (eg: MD, some Ph.D. programs, and post-doctoral work), leading to the most "highly skilled" (SVP 9) occupations.

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#### **OTHER VOCATIONALLY RELEVANT SUPPORTIVE RECOMMENDATIONS**

Client would appear likely to benefit from **job development and job coaching** services, for assistance in arranging appropriate reasonable accommodations and adapting to job requirements, as well as job-search skills training. Recommend **consideration** be afforded to arranging for: **MD** to rule out (R/O) Progesterone as causing nausea/vomiting/dizziness (NV/Diz) and chronic fatigue syndrome (CFS); **Psychological Evaluation** to rule out depression as cause of chronic fatigue syndrome (CFS); **Neurological Evaluation** (w/PET/SPECT imaging, as indicated) for prognosis; **Psychiatric** referral for treatment, as prescribed; **Occupational Therapy** (OT) if prescribed (for psychomotor speed); **Speech Therapy** (if prescribed) to address flat affect; **OT** and/or **Games** to improve spatial & form perception, coordination, dexterity, psychomotor speed and processing speed; and **Khan Academy** for remediation of GL 8.0 math.

**Note:** Law firms (with local offices) which deal with trademark & intellectual property include:

1. **Foley & Lardner:** Specializes in intellectual property law, including trademarks.
2. **Rumberger, Kirk, Caldwell:** Offers services related to intellectual property, including trademark litigation.
3. **Zimmerman, Kiser, Sutcliffe:** While primarily focused on business law, they also handle intellectual property matters.
4. **Finnegan, Henderson:** Renowned for its expertise in intellectual property law, including trademark and brand management.
5. **Daniel Law Offices:** Focuses on intellectual property law, including patents and trademarks.
6. **Beusse Sanks PLLC:** A full-service intellectual property law firm specializing in trademarks, copyrights, and patents.
7. **John Rizvi P.A.:** Dedicated to intellectual property law, including trademarks.
8. **Allen, Dyer, Doppelt & Gilchrist:** Provides comprehensive intellectual property services, including trademark protection.
9. **Bogin, Munns:** Handles intellectual property cases, including trademark and copyright litigation.
10. **Shuffield, Lowman:** Offers trademark services and intellectual property protection.

Some of these firms have recently advertised for Paralegals.

## **A NOTE FOR THE JOB COACH**

Client's interest-based work-personality profile, or VIPR-Type (a.k.a. Myers-Briggs Code) was found to be ESTP. At their best, people with ESTP preferences are **energetic, active problem-solvers**, responding creatively to challenging situations in their environment. They seldom let rules or standard procedures interfere, finding new ways to use existing systems. They often **develop easy ways to do hard things**, in order to make their work fun. They tend to be **flexible, adaptive, inventive, and resourceful**, can pull conflicting factions together. They also tend to make **good team members**.

ESTPs are usually considered popular companions for activities (parties, sports, or work) because of their zest for life and their enjoyment of the moment.

Characteristics of ESTPs:

ESTPs are typically interested in everything going on around them - activities, food, clothes, people, and the outdoors...everything that offers new experiences. Because they tend to learn more from doing than from studying or reading, they tend to plunge into things, learning as they go along, and trusting their ability to respond. ESTPs are likely to be...

- **practical and realistic**
- **observant**
- **focused on immediate experience**

ESTPs usually make decisions by logical analysis and reasoning, and can be tough when the situation calls for toughness. For the most part, however, they prefer to deal flexibly with what is, rather than make judgments. ESTPs usually are...

- **analytical, rational problem-solvers**
- **straight-forward and assertive**

ESTPs are often expert at seeing the need of the moment and reacting quickly to meet it. They tend to good-naturedly take things as they are, and seek satisfying solutions, rather than imposing a "should" or "must" of their own.

How Others May See Them:

ESTPs are characteristically strong in the art of living. Others respond to their enthusiasm and good humor; they usually love life and immerse themselves in it. ESTPs are, typically, people of action. They frequently dislike and avoid theory and written directions. Traditional schools can be difficult for people with these preferences, though ESTPs usually do well when they see the relevance and are allowed to experiment. Others generally see ESTPs as...

- **gregarious, fun-loving, and spontaneous**
- **adventurous risk-takers**
- **pragmatic trouble-shooters**

Potential Areas for Growth:

Sometimes life circumstances have not supported ESTPs in the development and expression of their Thinking and Sensing preferences.

- If they've not developed their Thinking, ESTPs will not have a useful way of selecting amongst the barrage of incoming sensory data. They may then make *ill-founded decisions and have difficulty setting priorities.*
- If they've not developed their Sensing, they may focus on the Sensing data that are immediately available. Their decisions then may be limited to *gratification of their sensual desires, particularly those involving physical challenge and risk.*

If ESTPs do not find a place where they can use their gifts and be appreciated for their contributions, they usually feel frustrated and may...

- *have trouble accepting structure and meeting deadlines,*
- *focus entirely on excitement and activity, get completely caught up in external activities, and*
- *put enjoying life ahead of important obligations.*

It is natural for ESTPs to give less attention to their non-preferred Intuitive and Feeling parts. If they neglect these too much, however, they...

- *may not see the wider ramifications of their actions and decisions,*
- *may forget dates and events which have special meaning to others,*
- *may be unaware of the impact of their actions on others, and*
- *may be impatient with discussion or exploration of relationships.*

Under great stress, ESTPs may experience negative fantasies. They may imagine that others do not really care about them, then marshal and distort their Sensing data to provide themselves with "evidence" of this neglect.

With regard to the 4-step career exploration process, ESTPs manifest the following tendencies:

- **Setting Goals:** ESTPs prefer immediate, tangible goals, but may have no clear sense of long term direction. Accordingly they **should be counseled to consider long term goals...5 or 10 years out.**
- **Gathering Information:** While finding themselves in the forefront with regard to the ability to take advantage of unforeseen opportunities, these Individuals may have no action plan to reach goals. Thus, should be counseled to set out a **detailed operational plan** with regard to these considerations.
- **Making Contact:** ESTPs often have an extensive network of contacts, but should exercise caution in terms of the amount of time they spend "on-line" in this network...making sure that time is spent productively. ESTPs often present a detailed picture of experience in specific areas during the interview, and should be cautioned against talking too much in that context...pausing to allow others present to ask questions. These Individuals may have difficulty answering hypothetical questions or making long term projections, and **should be coached to prepare them for hypothets.** In general, they must be careful not to overwhelm certain types of interviewers with too many details.
- **Making Decisions:** ESTPs are comfortable in the conduct of a logical analysis of career alternatives, but may neglect the most important values by focusing only on what is logical. Accordingly, they should be **counseled to consider what is truly important to themselves and significant others and to view the outcome of logical analysis in this light.** Finally, they may tend to put off decisions and should be encouraged to **set a deadline for making a decision** and posting it or announcing it to significant others.

## - Job Interview Preparation:

Role playing will likely be the most effective and successful way to prepare for various interview situations. Applicants will build social skills through this practice, and in turn build confidence. When applicants develop and learn powerful interview responses, they build stronger interpersonal skills; feel more at ease in social situations; and will be able to better represent themselves in diverse situations.

It is vital for applicants to find someone they trust and can work well with. The Job Coach, Counselor, friend or family member can be of enormous assistance in this area. Applicants need someone they are comfortable with (and can be honest with), to assist them in this preparation process. Most importantly, applicants need someone who will be able to view their performance honestly and objectively, and who can offer good constructive criticism.

Common interview questions & responses can be found at multiple online sites (just put “job interview Q/A” into any search engine). Applicants will want to look over several lists of questions to get the most rounded idea of the kind of information they may be asked to provide about themselves and their abilities. The greater variety of questions applicants are able to answer, the greater their ease will be during the interview process. Applicants will want to feel calm and relaxed, knowing that they have done their best to prepare themselves for the questions that may come their way. There is no way to prepare for every possible question that an employer could ask, but by becoming familiar with as many questions as possible, and being practiced and comfortable answering them, applicants will have a greater chance of positively representing themselves and their abilities.

Written responses to the most common interview questions (or the questions each applicant feels that they would have the most difficulty answering on the spot) can provide an extra step towards preparation. The Job Coach (or friend, family member, etc.) may assist the Applicant in developing a list of the 20 “most difficult” questions and then prepare written responses to each. These written responses should effectively answer the Interviewer’s inquiry, then smoothly transition into a brief rendition of one or more aspects of the Applicant’s “pitch” (usually the 3-4 key characteristics which match the Applicant to the job).

The Applicant should vocalize these responses, during the development phase, so that they can be revised and tailored to his/her style of speech. Each of the 20 most difficult interview question/answer (Q/A) items are drafted on separate sheets of paper...

**...WITH THE RESPONSES IN LARGE, BOLD, CAPITALIZED FONT, DOUBLE OR TRIPLE SPACED, SO THAT THE APPLICANT CAN READ THEM EASILY, WITH A BRIEF GLANCE. HIGHLIGHTING EVERY OTHER LINE OF THE RESPONSE IN DIFFERENT COLORS CAN ALSO HELP “GUIDE THE EYE”, DURING PRACTICE.**

These 20 Interview Q/A exercises should then be rehearsed (aloud), with the Job Coach reading the question, and the Applicant reading the response. *(For additional independent practice, the 20 questions can be audio or video recorded.)* As the responses are learned, the Applicant will need to look down at the “crib sheets” less and less frequently.



When familiarity with the material increases to a point *nearing* memorization, and the Applicant no longer needs to look down at the “crib sheets”, they can be set aside. Rehearsal continues with a mirror or video monitor in place, to help the Applicant refine his/her delivery. Other willing assistants, (eg. friends or family members) may be drafted to read interview questions, in order to provide variety.

Finally, an “interview dress rehearsal” should occur, preferably with someone that the Applicant considers to be an “authority figure”, asking the 20 questions. The Applicant should dress as he/she would for an actual interview. This exercise should be conducted in a simulated “office” setting, with the Applicant knocking and entering, then going through an introduction and other logical preliminaries, prior to initiating the mock interview. This process can be repeated as often as necessary.

There need be no concern that the Applicant will deliver rote/memorized responses, during an actual interview. One advantage of this preparatory technique is that the Applicant will have developed a set of coherent response *components*, which can be applied to a wide variety of questions, in an actual interview. Most importantly, though, is the sense of confidence that the Applicant will acquire... something that always makes a critical difference, in actual job interviews.

Applicants must do their homework and find out as much as possible about the position and the employer, before the interview. The Occupational Outlook Handbook can be used to find good descriptions of jobs and what they entail. The Applicant can also find job descriptions by entering the DOT Code into any search engine, and by entering the job title into [www.mynextmove.org](http://www.mynextmove.org). Online searches for information about the employer (and about the industry of interest, in general) can be useful, as well...often turning up a nugget that can be developed into something smart to say, in response to “do you have any questions”.

One example might be something like: “I understand that the company recently offered stock options as a sales incentive. Is that policy still in effect?” Applicants should have a couple of questions in mind, to ask at the end of the interview. Remember: The *wrong answer*, when the Interviewer asks if the Applicant has any questions, is “No”.

- **Helpful Hints for Job Coaches, in the Accommodation Process:**

- Early and frequent contact with the employer is essential, if permitted by Client. If possible, become the go-to person for issues concerning Client's work-adjustment. Give the employer reliable ways to contact you.
- Get a release, detailing which aspects of Client's disability condition(s) can be discussed with the employer.
- Establish contact with Client's family, roommate, or support-person, and find out who needs to be notified in case of emergency.
- Contact employer's EAP (Employee Assistance Program) to see what services/resources are available. Explore Client's rights under ADA (Americans with Disabilities Act).
- If feasible, it may be advisable to encourage a support person, possibly a friend or family member, familiar with the effects of the disability, to be part of the vocational rehabilitation process (with Client's permission, of course).

- With assistance from Client's treatment team, determine whether the disability condition is progressive, and if so, how Client's capabilities may deteriorate. This will help in ascertaining the long-term accommodations that may need to be made.
- Strive to insure that accommodations are adjusted (increased or reduced), according to deterioration or improvement in Client's condition/capabilities, so that the employee is able to continue working at an optimal level, maximizing income, independence and self-esteem.
- Keep in mind that a reassignment may become necessary in some situations.

Prepared by:

CLINT DELONG, MA,CRC,CVE,CRV(D)

Appendices:

1. Abbreviations, Codes & Values
2. Transferable Skills from Previous Employment
3. Comparison of Client's Worker-Trait Profile with Titles Related to Expressed Interests
4. Job-Match List (agency only)

Exhibits:

1. Client notes (Tasks 1 & 2)
2. Client notes (Tasks 3, 4 & 5)
3. List of Titles in Task 1 Display
4. Volunteer Program Notes (Task 2)
5. Floor Plan (Task 3)
6. Job-Search Tips (Task 4)
7. Book Summaries (Task 5)