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| The self-employment track is designed for Veterans who have the necessary job skills to start a business. Self-employment may also be the right track for Veterans who have limited access to traditional employment or require a more accommodating work environment due to the effects of a disability. This job aid is a step-by-step guide to providing self-employment services to Veterans using Fast Track planning procedures. Fast Track planning may be used for Veterans who are considering self-employment when self-employment is the primary focus of further rehabilitation planning. Please keep in mind if at any time in the process it is determined that self-employment is not feasible for the Veteran, then the process should stop and alternative rehabilitation options should be considered. |
| **Step** | **Verify Completion of Each Self-Employment Step** | **Add 🗸 in space below** |
| 1 | **ORIENTATION*** Move the case to Evaluation and Planning (EP) status to determine eligibility and if the achievement of a vocational goal is currently reasonably feasible
* Orient the Veteran to the Self-Employment Process and give him/her a copy of the Self-Employment Fact Sheet along with the link to the *Operation Boots to Business* video
* Ask the Veteran to sign VA Form (VAF) 28-0800 to verify that the orientation information was provided, and
* Give the Veteran a copy of VAF 28-0800 and file the original in the Veteran’s Counseling/Education/Rehabilitation (CER) folder
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| 2 | **PRELIMINARY SELF-EMPLOYMENT EVALUATION*** Advise the Veteran to check his/her credit report and that a free credit report can be obtained once every 12 months under the Fair and Accurate Credit Transactions (FACT) Act to ensure that self-employment is still the primary focus of rehabilitation planning
* Inform the Veteran that the provision of services is based on category assignment and that VR&E must not be considered the sole source in establishing a business
* Information should be given to Veterans who express an interest in non-profit businesses or franchises
* Conduct a preliminary evaluation and address the questions outlined in M28R, Part VI, Section A, Chapter 9.04.b
* The VRC will identify what business the Veteran is interested in starting and determine if the stated goal is consistent with the Veteran’s abilities, interests and aptitudes, and
* Document the preliminary evaluation in VAF 28-1902b or in a Corporate WINRS (CWINRS) note and include whether the Veteran’s personal finances are in order and if the findings indicate that self-employment is warranted (The Vocational Rehabilitation Counselor (VRC) may use a contract counselor to complete this process if contractual agreements are in place for the use of for-profit entities)
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| 3 | **CATEGORY ASSIGNMENT*** Assign the Veteran to the appropriate category (M28R, Part VI, Section A, Chapter 9.05), and
* Obtain approval from VR&E Service Central Office (CO) for a Category I assignment prior to plan development, as applicable

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| 4 | **DEVELOP A FAST TRACK IWRP FOR VETERANS CONSIDERING SELF-EMPLOYMENT*** Select the Long-Term Services Track in CWINRS and develop a Fast Track IWRP using DOT code 999 for the vocational goal
* Include an objective on the development and submission of a viable business plan (the VRC must refer the Veteran to a provider who offers services to help determine if self-employment is appropriate, as well as a referral to a professional business consultant as a guide in the development the business plan )
* Include training objectives that address any needed remedial training and/or general education coursework needed to startup the business identified during the preliminary evaluation, as well as accounting, business management and/or economics coursework to provide insight into certain aspects of running a successful business, as applicable
* Include coordination of services objectives that address medical, psychological and related services, as applicable
* Define case management objectives as at least Level 2 (at least 3 face-to-face meetings per year), and
* Provide a list of the information needed to conduct a thorough viability analysis of the business plan to the Veteran in advance of his/her meeting with the provider who will assist in the development of the business plan (refer to M28R.VI.A.9.06.b)
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| 5 | **ANALYSIS OF THE BUSINESS PLAN*** Conduct, arrange or contract the assessment of the economic viability of the proposed business plan (M28R, Part VI, Chapter 9.06.b.1(c))
* Arrange a professional consultation on either a voluntary or contractual basis to assist with the analysis of all areas of the business plan to determine viability (M28R.VI.A.9.06.b.1)
* Complete a summation of the business plan viability analysis on VAF 28-1902n or in a CWINRS note to include the economic viability assessment and documentation from the contractor/provider who assisted in completing the viability analysis (M28R.VI.A.9.06.c), and
* Ensure that the viability analysis clearly addresses the information listed in M28R.VI.A.9.06.b.1, as well as any additional supporting documentation relevant to the Veteran’s request for self-employment services. The analysis must clearly address the viability of the business plan and identify the rehabilitation services needed
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| 6 | **RE-DEVELOPMENT OF THE FAST TRACK IWRP*** Discuss the findings of the viability analysis with the Veteran in an effort to redevelop the Fast Track IWRP
* Select the Self-Employment Track in CWINRS and develop an IWRP Self-Employment plan
* Ensure that the plan clearly outlines the Veteran’s goals and objectives, as well as criteria for measuring the success of those goals and objectives (M28R, Part VI, Chapter 9.07.a)
* Convert the DOT code from 999 to the specific identified DOT code, and
* Ensure that re-development of the Fast Track IWRP occurred in RTE status and that the case did not return to EP status
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| 7 | **CONCURRENCE*** Obtain approval for the self-employment plan from the VR&E Officer, as well as other signature levels depending on cost of the business plan, before obtaining the Veteran’s signature or authorizing any service, and
* Ensure that the Veteran signs the VAF 28-8872, Rehabilitation Plan once approval is obtained
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| 8 | **CASE MANAGEMENT*** Provide case management services to ensure that the objectives and goals of the rehabilitation plan are addressed and met (at least 3 face-to-face meetings per year)
* Declare the Veteran job ready once all objectives of the IWRP Self-Employment plan are complete or there is a documented justification as to why a service on the plan was not provided, the business is operational, and the Veteran is successfully adjusted, and
* Move the case to Job Ready status and conduct follow-up contacts for a minimum of 12 months after the successful start-up of a business to ensure that the Veteran’s business is successful and all needs are addressed and met (M28R, Part VI, Chapter 9.07.c)
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| 9 | **REHABILITATION*** Once the case has been properly followed-up for one year to ensure stability of the Veteran’s employment, complete VAF 28-0962, Self-Employment Rehabilitation Checklist and properly sign and date, and
* Submit along with the Veteran’s CER folder to the VR&E Officer for review and concurrence
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