Colorado EMPLOYMENT FIRST™
Support | Connect | Succeed

INDIVIDUAL APPOINTMENT EVALUATION FORM

County:	Case Manager:
Case Name:	CBMS#:
SS#:	ABAWD: Y N

PROCESS	SCORE
Desk worker greeted and dealt with the client in a professional manner	
Adequate coverage at check-in desk	
Desk worker asked appropriate questions to determine purpose of visit	
Desk worker briefly researched client's case on CBMS	
Appropriate action was taken at check-in desk (directed to meet with a CM, collected verification, given	
Participant given something to read or do while waiting Wait Time:	
There was some degree of confidentiality	
CASE MANAGER	
Greeted participant professionally	
Attentive, listened, made eye contact	
Acknowledged and addressed barriers presented by participant	
Thoroughly explained documentation required for possible exemption (if applicable)	
Explained participant's options in EF	
Asked participant if they had any questions or concerns	
Answered all questions correctly and completely	
Assigned participant to an appropriate activity	
Fully explained next activity (requirements and necessary documentation due at follow-up appt)	
Provided job search assistance	
Informed participant of what to do if they got a job	
Used multiple activities to ensure client receives appropriate assistance	
Used creative solutions to solve problems	
Sought ways to motivate participant	
Assessment form complete and well documented	
Collected exemption/employment documentation (if applicable)	
Referred to county and community resources for assistance with barriers	
Competency worked on and documented	
Insured follow-up appointment letter was signed and given to participant	
Gave participant reimbursement (if applicable)	
TOTAL POINTS:	
FINAL SCORE: (Total points ÷ number of items scored)	

SCORING:
N/A – Does Not Apply
0 – Required Factor was Absent or Inconsistent
1 – Quality was Acceptable
2 – Quality was Excellent

Reviewer _____ **Date** _____