



# New Costumer Checklist

NAME \_\_\_\_\_

DATE \_\_\_\_\_

	ACTIVITIES	
1	Meet with costumer to gather initial information.	
2	Meet with costumer's family to gather information.	
3	Meet with costumer's support team (teachers, advocates, other).	
4	Discuss benefits counseling.	
5	Work with costumer/team to create a household or individual budget.	
6	Complete vocational profile.	
7	Develop Individual Employment Plan (IPE).	
8	Identify employment interests within the community.	
9	Pursue desired job leads / contact employers.	
10	Schedule situational assessments / working interviews.	
11	Discuss observations and outcomes.	
12	Complete applications for desired positions.	
13	Follow up with employers and schedule interview.	
14	Prepare for interview / complete interview.	
15	Send follow-up thank you (email).	
16	Follow-up with employers after 7-14 days.	
17	(Write in any additional steps here):	
18		
19		
20		

# One Page Description

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**WHAT OTHERS LIKE  
ABOUT ME**

**THINGS THAT ARE IMPORTANT TO ME**

**INSERT PHOTO  
HERE OR QUOTE  
HERE**

**WHAT I'M LOOKING  
FOR IN A JOB**

**HOW I LIKE TO BE SUPPORTED**

The contents of this resource were developed under grant number H421D220004 from the Department of Education. However, those contents do not necessarily represent the policy of the Department of Education, and you should not assume endorsement by the Federal Government. (Authority: 20 U.S.C. §§ 1221e-3 and 3474)