

Maryland State Department of Education
Division of Rehabilitation Services
Plan Template Instructions

To create a Plan Template, you will need to be in the **Participant Module** looking at a caseload. At the top of the page click on **Actions**, then **Manage Plan Templates**. Since you have no Templates, you will see something like this:

The screenshot shows a navigation bar with buttons for 'Finish', 'Pages', 'Reports', 'New', 'Actions', 'Previous', 'Next', and 'Cancel'. Below this is a 'Plan Template Search' section with a search bar and a results count of 'Plan Template Search Results (0)'. A 'New' button is visible. The main content area shows a table with columns 'Template Name' and 'Case Type', and the message 'No records found.' at the bottom, along with pagination controls showing 'Page size: 5000' and '0 items in 1 pages'.

To begin a New Plan Template, click the **New** button. You will then see this:

The screenshot shows the 'New Plan Template' form. It has a title 'New Plan Template' and a sub-section '1. New Plan Template'. There are two main input fields: 'Template Name*' which is an empty text box, and 'Case Type*' which is a dropdown menu currently showing '(Not Completed)'. The form is set against a light blue background.

Give this Template a **Name** (e.g., includes Job Coaching, Post-Secondary plan), and then use the dropdown to choose what **Case Type**.

Click **Finish** to move into the open Template of the **Plan Page**.

In the following example, the **Template Name** is “Job Coaching” and the **Case Type** is for VR.

Finish	Pages	Reports	New	Actions	Previous	Next	Cancel
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Plan Template

1. Plan Template

Template Name*

Case Type

2. General Information

Plan Type

Customized Employment

Supported Employment

Self Employment

Employment Goal

Goal

Custom

Secondary Education

Post Secondary Education

Reason for Selecting this Employment Goal Options

I have a job doing this type of work already

I have a job offer to do this type of work already

I have completed related training successfully

I have experience doing this type of work.

I have explored options and this is a good choice.

I have successfully done this type of work before.

I'm interested in jobs in that ONET Career Cluster

I'm interested in jobs in that ONET Job Family

The ONET lists this as a Green Economy Sector job

The ONET lists this as a job with a Bright Outlook

The ONET lists this job as a "S.T.E.M." Discipline

The related jobs below would be satisfactory:

Employment Goal Reason Narrative

On this page, complete only the fields you want. Because this is a template, any fields or information you enter will be consistently there each time you use this template.

Other notes:

- Templates are only used for the initial IPE. Subsequent plans follow the IPE cloning amendment process.
- Templates become individualized when you are using them in a consumer's case; using them will not alter the original template created.
- Templates are saved on a staff person's profile in AWARE™ and cannot be accessed by any other staff.