

CAREER SOLUTIONS REHABILITATION

Vocational Rehabilitation & Career Assessment Services
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NOT A REAL MEDICAL RECORD

VOCATIONAL REHABILITATION ASSESSMENT

CLIENT INFORMATION

Name: John A. Doe
(FICTIONAL)
DOB: 01/15/1985
Age: 40 years
Sex: Male
SSN: XXX-XX-1234
(FICTIONAL)
Assessment Date: 12/10/2025

REFERRAL INFORMATION

Referring Entity: ABC Insurance Company
Counselor: Robert Career, M.S., CRC
Date of Injury: 07/30/2025
Type of Assessment: Comprehensive VR Evaluation
Purpose: Return-to-work planning

REMINDER: FICTITIOUS TESTING DOCUMENT

BACKGROUND INFORMATION

Mr. Doe is a 40-year-old male who sustained multiple injuries in a motor vehicle accident on 07/30/2025 while commuting to work. He was employed as a Staff Accountant at Fictional Accounting Services, LLC at the time of his accident. This vocational rehabilitation assessment was requested to determine his current work capacity, identify barriers to return-to-work, and develop an appropriate rehabilitation plan.

Injury Summary:

- Left intertrochanteric hip fracture (surgically repaired)
- Cervical strain with C6 radiculopathy
- Lumbar strain with L4-L5 disc protrusion
- Chronic pain syndrome
- Secondary depression and anxiety
- Cognitive difficulties related to pain and medications

Current Status: 20+ weeks post-injury, ongoing medical treatment, has not returned to work

EDUCATIONAL HISTORY

High School: Anytown High School, graduated 2003, GPA 3.2

College: State University, Bachelor of Science in Accounting, graduated 2007

- GPA: 3.4/4.0
- Relevant coursework: Advanced Accounting, Financial Analysis, Tax Preparation, Business Law
- No learning disabilities or academic accommodations required
- Financed education through part-time work and student loans

Continuing Education:

- QuickBooks Certification (2015)
- Continuing Professional Education for CPA license maintenance
- Various employer-sponsored training programs

Academic Strengths: Mathematics, analytical thinking, attention to detail

Academic Challenges: None identified prior to accident

WORK HISTORY

Current Position (at time of accident):

Employer: Fictional Accounting Services, LLC

Position: Staff Accountant

Dates: January 2020 - July 2025 (5.5 years)

Salary: \$55,000 annually
Supervisor: Mary Manager (available for reference)
Job Duties:

- Accounts payable/receivable management
- Monthly financial statement preparation
- Quarterly tax return preparation
- Payroll processing for 50+ employees
- Budget analysis and variance reporting
- Client communication and support
- Data entry and reconciliation work

Previous Employment:
2015-2019: Junior Accountant, Small Business Accounting Inc.
(\$42,000/year)
2010-2015: Accounting Clerk, Regional Manufacturing Co. (\$35,000/year)
2007-2010: Bookkeeper, Local CPA Firm (\$28,000/year)

Performance Evaluations: Consistently rated "Meets Expectations" or "Exceeds Expectations"
Work Attendance: Excellent prior to accident (average 2-3 sick days per year)

EARNINGS ANALYSIS

Year	Gross Earnings	Employer	Position
2025 (partial)	\$31,900	Fictional Accounting Services	Staff Accountant
2024	\$53,500	Fictional Accounting Services	Staff Accountant
2023	\$52,000	Fictional Accounting Services	Staff Accountant
2022	\$50,000	Fictional Accounting Services	Staff Accountant
2021	\$48,500	Fictional Accounting Services	Staff Accountant

Average Annual Earnings (2021-2024): \$51,000
Career Progression: Steady increases averaging 4-5% annually
Benefits Package: Health insurance, 401k with 3% match, 3 weeks PTO

TRANSFERABLE SKILLS ANALYSIS

Technical Skills:

- Advanced proficiency in Microsoft Excel, Word, PowerPoint
- QuickBooks and various accounting software packages
- Tax preparation software (TurboTax Pro, Drake)
- Database management and data analysis
- Financial reporting and analysis
- 10-key and typing skills (60+ WPM)

Functional Skills:

- Mathematical computation and analysis
- Attention to detail and accuracy
- Problem-solving and analytical thinking
- Written and verbal communication
- Customer service and client relations
- Time management and deadline orientation
- Team collaboration and independent work

Knowledge Areas:

- Generally Accepted Accounting Principles (GAAP)
- Federal and state tax regulations
- Payroll processing and employment law compliance
- Financial statement preparation
- Budget development and analysis
- Business operations and procedures

CURRENT FUNCTIONAL LIMITATIONS

Based on review of medical records and functional capacity evaluation:

Physical Limitations:

- Sitting tolerance: Maximum 45 minutes continuous
- Standing tolerance: Maximum 20 minutes continuous
- Walking: Limited to 200 feet without rest
- Lifting: Maximum 15 pounds occasionally

- Bending/stooping: Severely limited
- Driving: Limited to 30-minute distances

Cognitive Limitations:

- Processing speed significantly slowed
- Difficulty with sustained concentration (15-20 minutes)
- Memory retrieval problems
- Reduced mental flexibility and multitasking
- Medication-related cognitive fog

Psychosocial Factors:

- Chronic pain causing distraction and irritability
- Depression and anxiety affecting motivation
- Sleep disruption impacting cognitive function
- Social isolation and loss of confidence

VOCATIONAL ASSESSMENT AND RECOMMENDATIONS

Return to Previous Employment Analysis:

Mr. Doe's current functional limitations significantly impact his ability to return to his pre-accident position as Staff Accountant. Key barriers include:

- Inability to sit for extended periods required for desk work
- Cognitive difficulties affecting accuracy and productivity
- Concentration problems impacting complex financial tasks
- Reduced processing speed affecting deadline-driven work

Work Capacity Assessment:

Current capacity: Part-time (20-25 hours/week) sedentary work with significant accommodations

Potential capacity with rehabilitation: Part-time to full-time sedentary work with accommodations

Accommodation Needs for Current Employer:

1. Reduced work schedule (4-6 hours/day initially)
2. Sit/stand workstation with ergonomic equipment

3. Frequent breaks every 30-45 minutes
4. Modified duties (reduced complexity initially)
5. Flexible schedule to accommodate medical appointments
6. Written instructions and electronic task reminders
7. Quiet work environment to minimize distractions

Alternative Career Options:

If return to current employer is not feasible:

1. **Part-time Bookkeeping Services:** Self-employed or contract basis
2. **Tax Preparation (Seasonal):** H&R Block, independent practice
3. **Data Entry Specialist:** Remote work opportunities
4. **Administrative Assistant:** With accounting knowledge premium
5. **Financial Services Support:** Bank or credit union positions

Retraining Considerations:

Given Mr. Doe's strong educational background and work experience, extensive retraining is not recommended. Focus should be on:

- Accommodations and modifications to existing skills
- Technology training to improve efficiency
- Cognitive rehabilitation to address processing issues
- Gradual return-to-work programs

EARNING CAPACITY ANALYSIS

Pre-Accident Earning Capacity: \$55,000+ annually with potential for growth

Current Earning Capacity:

- With accommodations at current employer: \$30,000-40,000 annually (part-time initially)
- Alternative employment options: \$25,000-35,000 annually
- Self-employment potential: \$20,000-30,000 annually

Factors Affecting Earning Capacity:

- Reduced work hours due to physical limitations
- Decreased productivity due to cognitive issues

- Limited job mobility due to accommodation needs
- Potential for improvement with successful rehabilitation

Economic Loss Analysis:

- Immediate loss: \$15,000-25,000 annually
- Long-term loss: Potential \$200,000-300,000 over remaining work life
- Factors: Age (40), planned retirement (65), career progression potential

REHABILITATION PLAN

Phase 1 (Months 1-3): Medical Stabilization

- Continue medical treatment and pain management
- Cognitive rehabilitation therapy
- Psychological counseling for adjustment issues
- Sleep disorder treatment

Phase 2 (Months 4-6): Work Conditioning

- Graduated work simulation activities
- Computer skills refresher training
- Accommodation technology training
- Trial work periods (2-4 hours/day)

Phase 3 (Months 7-12): Return to Work

- Gradual increase in work hours
- On-site job coaching if needed
- Ongoing accommodation support
- Follow-up services to ensure job retention

Estimated Rehabilitation Costs:

- Cognitive rehabilitation: \$5,000-8,000
- Work conditioning program: \$3,000-5,000
- Accommodation equipment: \$2,000-3,000
- Job coaching services: \$2,000-4,000
- Total estimated cost: \$12,000-20,000

COUNSELOR CERTIFICATION

I have personally conducted this comprehensive vocational rehabilitation assessment and reviewed all available documentation. The above represents my professional vocational opinion based on accepted rehabilitation practices.

Prepared by: Robert Career, M.S., CRC

Date: 12/10/2025

Certified Rehabilitation Counselor

License #: CRC-444444 (FICTIONAL)

Experience: 12 years in vocational rehabilitation

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