



OCF1-2026

OCCUPATIONAL CLASSIFICATION AND FUNDING TRACEABILITY

What Work Are We Paying For?

Work Identification, Responsibility, Quality State, and Funding Support

Updated Edition - August 2026

AMERICAN SUPPORT STANDARDS INITIATIVE

Abstract

Editorial Alignment Note (August 2026). This updated edition aligns OCF1 with the stabilized Whole Quality and AMSI architecture reflected in the August 2026 controlled editions of WQI_VOC1, AMSI VOC1, WQS1, AMSI ORF1, applicable Core Standards and Context Guides, and AMSI SCM1. The revision strengthens architectural consistency, Boundary and Interface transparency, and traceability without changing the article's analytical conclusions or creating new Root Concepts, Applied Concepts, quality requirements, funding rules, or certification authority.

Funding systems commonly organize payment through program names, service categories, job titles, reimbursement codes, and administrative units. These devices may be necessary for authorization and accounting, but they do not necessarily show the Occupational Functions performed, the Support Roles through which they are performed, the responsibilities attached to those roles, or the Support Results the funded work is expected to realize.

OCF1 updates the earlier analysis using the stabilized Whole Quality and AMSI occupational architecture. It applies the distinctions among Occupation, Job, Occupational Function, Support Role, Functional Scope, Blended Occupational Practice, Occupational Time-Sharing, and Multiple-Role Practice. It then connects those distinctions to the declared Support Service Quality Object, Structural Checkpoints, Support Work, Support Results, Evidence, Support Service Quality State determination, and bounded claims.

The central conclusion is practical: funding and price can be interpreted responsibly only when the work, responsibilities, results, service conditions, and Evidence basis to which they relate are traceable. Occupational classification is an important anchor, but occupational identity alone does not define the actual work arrangement or establish quality. Funding traceability supports transparency and accountability; it is not a Quality Indicator and does not itself establish a satisfactory Support Service Quality State.

Analytical terminology note. OCF1 uses “work traceability,” “responsibility traceability,” “funding traceability,” and “quality-support gap” as explanatory analytical expressions. They are not presented as new Root Concepts or AMSI Applied Concepts. The controlled terminology and governing meanings remain in WQI_VOC1, AMSI VOC1, WQS1, AMSI ORF1, applicable Core Standards and Context Guides, and AMSI SCM1.

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1 Purpose and Analytical Position

OCF1 examines why support-service funding becomes difficult to interpret when the work being funded is described only through labels. It asks how occupational and functional information can make the relationship among work, responsibility, results, funding, Evidence, and quality more visible without treating occupational classification, price, or payment as quality itself.

The publication retains the main insight of the earlier edition: funding systems pay for services, but the service categories used for payment may obscure what people actually do. The updated analysis places that problem within the stabilized AMSI document architecture and narrows the role of OCF1 to explanation and policy-oriented analysis.

1.1 Relationship to the AMSI document architecture

WQI_VOC1 provides the authoritative Whole Quality Root Concepts. AMSI VOC1 provides the authoritative Applied Concepts for support services. WQS1 explains their relationship within the AMSI Whole Quality Framework. AMSI ORF1 governs occupational anchoring and functional interpretation. Core Standards identify invariant Core Quality Factors and Core Quality Indicators; Context Guides provide bounded Context-Specific Interpretation and Context-Specific Quality Outcome Criteria; and AMSI SCM1 governs Evidence evaluation, Support Service Quality State determination, verification, claim decisions, and continued validity.

OCF1 is an analytical publication. It does not redefine occupational terms, assign an official SOC code, prescribe a funding model or reimbursement rate, establish entitlement, determine wages, authorize Support Work, define a professional scope of practice, perform a Quality State determination, or create a certification scheme.

1.2 Framework Principle

The Support Service Quality Object framework is the governing conceptual model for interpreting occupational classification and funding traceability within AMSI. OCF1 explains how occupational information, Support Roles, Functional Scope, Support Work, Support Results, responsibilities, funding conditions, Evidence, and Support Service Quality State determination relate within that framework. OCF1 does not establish an alternative quality methodology. Internal or external classification of a participant, organization, technology, responsibility, Boundary, or Interface depends on the declared Support Service Quality Object and its declared Scale.

2 Why Work Becomes Invisible

People perform real work through particular Interactions, Episodes, Jobs, Support Roles, and Service Periods. They assist with daily-life functioning, provide employment support, communicate, observe, coordinate, document, adapt, escalate, and contribute to Support Results. The work exists even when a funding or program label describes it incompletely.

Administrative systems, however, often begin from eligibility, service definitions, authorized units, rate categories, provider contracts, or billing codes. These structures answer important administrative questions, but they may not answer the functional question: what work is actually required, assigned, performed, and evidenced within the declared Support Service Quality Object?

2.1 Administrative labels and actual work

A Job title, program title, payer category, provider description, or service label may provide Evidence about an arrangement, but it is not conclusive Evidence of occupational identity, Functional Scope, Competence, authorization, responsibility, or work actually performed. The same title may organize different work across employers and jurisdictions, while materially similar work may appear under different titles.

When a label substitutes for a functional description, higher-skill or higher-responsibility work may be hidden within a lower-described category; distinct functions may be grouped together; service intensity may change without becoming visible; and tasks completed by family members, natural supports, technology systems, supervisors, or other providers may be attributed incorrectly to the funded service.

2.2 Consequences for funding and accountability

Once work is under-described, funding loses a clear object. A rate or unit may remain administratively valid while the work, responsibility, continuity, coordination, and Evidence conditions necessary for Function Realization are unclear. Price becomes difficult to compare, expectations may exceed funded capacity, and gaps between authorized service and realized service may be absorbed into worker effort, unpaid coordination, family contribution, reduced intensity, or unresolved risk.

This loss of visibility is not only an accounting problem. It weakens the ability to distinguish whether a service limitation arises from occupational misclassification, an unclear responsibility arrangement, insufficient funded support, a breakdown at an Interface, an Evidence gap, or an adverse service condition. The declared Support Service Quality Object provides the common reference needed to keep those possibilities separate and traceable.

3 Controlled Occupational Architecture

AMSI ORF1 begins with classification by work performed. Occupation provides a stable work-domain reference, while the declared Support Service Quality Object requires a more detailed record of the actual functions, roles, limits, participants, time, Interfaces, and responsibilities that contribute to the service.

3.1 Occupation, Job, Occupational Function, Support Role, and Functional Scope

Controlled distinction	Role in OCF1
Occupation	The stable official work-domain reference used for occupational identity.
SOC-Anchored Occupation	The official SOC title and code recorded together with the AMSI-relevant functions connected to the declared Support Service.
Job	A specific work arrangement. Its title is informative but does not by itself establish occupational identity or complete Functional Scope.
Occupational Function	A defined contribution that bridges the official occupational reference and the actual Support Work relevant to the object.
Support Role	How a participant contributes within the Support Service.
Functional Scope	The bounded functions, limits, authority, responsibilities, and conditions applicable to that contribution.

These distinctions prevent a common error: treating a Job title or funding category as though it fully described the occupational and functional structure of the service. Occupational anchoring identifies the work domain; the actual object description must still identify who performs which material functions, under what authority and responsibility, during which Service Period, through which Interfaces, and with what Evidence.

3.2 Blended Occupational Practice, Occupational Time-Sharing, and Multiple-Role Practice

Support services frequently involve work that does not fit one simple label. Blended Occupational Practice occurs when one Job, Support Role, worker contribution, or Support Service includes functions associated with two or more Occupations. Occupational Time-Sharing concerns the distribution of

functions across time, phases, Interactions, Episodes, or portions of a Job or Service Period. Multiple-Role Practice occurs when one participant holds, performs, or moves among materially distinct Support Roles within the same or related Support Service Quality Objects.

These arrangements do not merge occupations or erase differences in Competence, authorization, responsibility, or Evidence. Where the distinctions affect Function Realization, Critical Service Conditions, attribution, or claims, the material functions and their sources must remain visible.

These arrangements should be interpreted as different realization configurations within the declared Support Service Quality Object, not as permission to collapse distinct Occupations, Support Roles, Functional Scopes, or responsibilities. Their quality relevance depends on whether the arrangement supports Function Realization and whether the related work, authority, time, Interfaces, and Evidence remain visible.

4 Support Service Quality Object and Work Traceability

Funding traceability cannot begin from an isolated worker, rate, invoice, activity code, or outcome. It begins with the declared Support Service Quality Object: the bounded service whose Quality State is to be determined. The object includes the relevant Person Receiving Support, Support Workers and other material participants, Support Work, Support Results, Support Intended Functions and Support Intended Results, Service Period, Support Service Arrangement, Boundaries, Interfaces, responsibilities, Context, Reference Layer, Assumptions, Uncertainty, and Evidence basis.

The Support Service Quality Object Description is therefore the traceability anchor for occupational interpretation, Functional Scope, work and responsibility attribution, funding analysis, Evidence planning, Support Service Quality State determination, and any bounded Support Service Quality Claim Statement. Each later conclusion shall remain traceable to the same declared object, Scale, Service Period, Boundaries, Interfaces, Context, responsibilities, Assumptions, Uncertainty, and Evidence basis.

4.1 Support Work, Support Result, and Support Service

The controlling AMSI relationship is conceptual: Support Work + Support Result = Support Service. The relationship does not imply that every observed Result was caused exclusively by the funded Support Work. Results may be shared, delayed, maintained, partial, adverse, uncertain, or influenced through external Interfaces.

Work traceability therefore requires more than recording an activity. It requires a visible relationship among the function intended, the participant and Support Role, the actual work performed, the relevant time and Context, the responsibility and Functional Scope, the expected or observed Result, and the Evidence available to support attribution.

A completed activity does not by itself establish successful Function Realization. The relevant question is whether the actual Support Work, together with the resulting condition or change, supported the declared Support Intended Functions and Support Intended Results within the stated Service Period, Boundaries, Interfaces, responsibilities, and Evidence basis.

4.2 Structural Checkpoints and declared responsibilities

Before occupational, funding, or quality interpretation proceeds, Structural Checkpoints should confirm that the object is sufficiently described. Structural Checkpoints are a methodological completeness step. They are not occupational classifications, Core Quality Factors, Core Quality Indicators, Context-Specific Quality Outcome Criteria, technical assessments, funding conclusions, or Support Service Quality State determinations. At minimum, the application should make visible:

- the Quality Object and its Scale, Service Period, and Support Service Arrangement;
- the Person Receiving Support, Support Workers, organizations, and other material participants;
- the included Support Work, Support Results, Support Intended Functions, and Support Intended Results;

- the Occupations, Jobs, Occupational Functions, Support Roles, Functional Scopes, authorizations, and responsibilities;
- the external Boundary, material internal Boundaries, material internal Interfaces, and material external Interfaces;
- the applicable Context, Core Standard, Context Guide, Reference Layer, and funding arrangement;
- the expected Evidence sources, attribution limits, Assumptions, Uncertainty, and Unresolved Conditions; and
- the intended Support Service Quality State determination and Support Service Quality Claim Boundary.

Where these elements are unclear, the funding unit may be administratively identifiable while the service to which it relates remains methodologically under-described.

Boundary Transparency requires the basis for including and excluding material participants, work, roles, responsibilities, technologies, organizations, and service conditions to remain explicit. Interface Transparency requires the interactions through which work, information, supervision, coordination, funding, technology, and external requirements affect Function Realization to remain visible. These transparency conditions support responsible attribution and prevent administrative labels or payment records from silently expanding the object or claim.

Structural Checkpoints protect later interpretation from beginning with an administratively convenient but methodologically incomplete object. They do not classify the occupation, evaluate funding adequacy, determine quality, or assign responsibility by themselves. They confirm that the object is sufficiently described for those questions to be addressed responsibly.

5 Five Layers of Traceability

OCF1 separates five related forms of traceability. They support one another but answer different questions and should not be collapsed into one measure.

Traceability layer	Primary question	Illustrative record
Occupational traceability	Which official occupational domains and material Occupational Functions are involved?	SOC reference, occupation, function record, occupational source, classification limitation.
Work traceability	What Support Work was required, assigned, performed, omitted, changed, or transferred?	Work description, participant, time, Interaction or Episode, Context, method, completion or non-completion.
Responsibility traceability	Who was authorized, expected, responsible, supervisory, or accountable for each material function?	Support Role, Functional Scope, authorization, supervision, escalation, employer or provider responsibility.
Funding traceability	Which resources and payment conditions were intended to support which work and service conditions?	Rate, unit, funded time, exclusions, staffing assumption, coordination allowance, supervision, documentation, technology, continuity.
Quality traceability	How do the declared object, criteria, Evidence, findings, Critical Service Conditions, and uncertainty support the Quality State and claim?	Criteria, Evidence-Supported Findings, Factor Interpretation, Quality State, Claim Boundary, stated limitations.

A payment record may be strong Evidence of what was authorized or paid. It is not automatically Evidence of what work was actually performed, which Result occurred, whether a Critical Service Condition was satisfied, or what Support Service Quality State should be determined.

6 What Funding Traceability Means

Funding traceability is the ability to connect a funding arrangement to the bounded work, responsibilities, time, support conditions, and Evidence infrastructure it is intended to enable. It asks whether the economic and administrative arrangement can be followed through to the actual service architecture rather than stopping at the name of a program or billing unit.

6.1 Funding as an economic and Reference-Layer condition

Funding belongs principally to the economic domain and the external Reference Layer. It affects the declared Support Service Quality Object through material external Interfaces that may authorize, enable, delay, restrict, fragment, or discontinue time, staffing, supervision, coordination, technology, training, documentation, transportation, replacement coverage, and other conditions relevant to Function Realization. A payer, funding authority, or reimbursement system remains outside the object unless expressly included within the declared object and Scale.

A funding condition becomes quality-relevant when Evidence shows that it materially affects a Quality Factor, Context-Specific Quality Outcome Criterion, Critical Service Condition, or other declared quality condition. The analysis must identify the pathway rather than infer quality directly from the amount paid.

Funding therefore influences quality indirectly rather than defining it. The analytical task is to identify the external Interface through which a funding condition affects time, staffing, supervision, coordination, continuity, technology, documentation, or another condition necessary for Function Realization, and then to examine the Evidence supporting that relationship.

6.2 What funding traceability does not establish

Funding traceability does not transform funding, price, rate compliance, budget adherence, or payment approval into a Quality Indicator. It does not establish that the funded amount was sufficient, that the service was delivered as authorized, that the Support Results occurred, or that a satisfactory Support Service Quality State was realized.

The distinction is essential: funding traceability explains how resources relate to the service; Quality State determination interprets the actual Evidence-supported condition of the declared object.

7 Why Systems Lose Track of Work

Most funding systems were designed around eligibility, program administration, service definitions, authorized units, provider qualifications, contracts, and reimbursement rules rather than around a complete occupational and Support Service Quality Object architecture. The resulting records may be internally consistent while remaining functionally incomplete.

Common loss points include:

- one service category covering materially different work and responsibility arrangements;
- one Job title used for different Occupational Functions across organizations or jurisdictions;
- different titles used for materially similar work;
- blended work being recorded as one undifferentiated service;
- unpaid, informal, supervisory, family, or inter-service work becoming invisible;
- funded time excluding coordination, documentation, travel, reassessment, or escalation that is necessary for the intended service;
- technology outputs being treated as substitutes for human observation, judgment, interaction, or responsibility; and
- payment and compliance records being treated as proxies for work, Result, Evidence Sufficiency, or quality.

These losses weaken comparability and accountability. They also make it difficult to distinguish an inefficient service, an underfunded service, a poorly organized service, an incorrectly classified function, an Evidence gap, and an actual quality failure.

8 Funding Support Conditions and Quality-Support Gaps

A funding arrangement may be relevant to whether required service conditions can be sustained. Examples include sufficient time and intensity; continuity and replacement coverage; Competence development and supervision; coordination across Interfaces; accessible technology; documentation and Evidence continuity; reassessment; escalation capacity; and adaptation when needs, workplace conditions, or service arrangements change.

A quality-support gap is visible when required quality conditions are identified but the arrangement does not support, does not demonstrate support for, or cannot be shown to support those conditions. The gap should be described precisely. It may concern authorization, funded time, workforce availability, Functional Scope, coordination, Evidence, uncertainty, or another support condition.

A quality-support gap is not automatically proof of an adverse Quality State, because the actual service may be sustained through other declared resources or Interfaces. Conversely, the absence of a documented funding shortfall is not proof of satisfactory quality. The object, actual work, Results, Evidence, and Critical Service Conditions must still be interpreted.

A quality-support gap should remain distinct from both a funding shortfall and a Quality State conclusion. The gap identifies a potentially material mismatch between required quality-support conditions and the resources or arrangements shown to support them. Its effect on the Support Service Quality State must still be interpreted through applicable criteria, Evidence-Supported Findings, Critical Service Conditions, Assumptions, and Uncertainty.

9 Price, Cost, Funding, Value, and Quality

OCF1 complements CPB1, which addresses why price cannot function as a Quality Indicator.

Occupational and work traceability are necessary because price differences cannot be interpreted fairly when the work and responsibilities behind them are unknown.

Category	What it describes	Proper analytical use
Support Service Quality	The Evidence-supported Quality State of the declared Support Service Quality Object.	Quality State determination, verification, bounded claims, and improvement.
Price or rate	The amount charged, paid, reimbursed, authorized, or budgeted.	Purchasing, reimbursement, affordability, budgeting, and economic comparison.
Cost	Resources consumed to perform, coordinate, sustain, and evidence the service.	Operational, workforce, sustainability, and cost analysis.
Funding	The arrangement through which resources are authorized, made available, or paid.	Eligibility, unit, timing, exclusion, support-condition, and sustainability analysis.
Value	The relationship between Evidence-supported quality or results and resources used.	Policy, purchasing, planning, and comparison after quality and cost are visible.

A higher price may reflect more complex work, scarce labor, continuity, supervision, geography, administrative structure, bargaining power, or inefficient delivery. A lower price may reflect efficiency, reduced scope, hidden contribution, underpayment, low intensity, or unsupported conditions. Without work, responsibility, Result, and Evidence traceability, price alone cannot distinguish these possibilities.

10 Evidence and Responsible Attribution

Traceability depends on Evidence that is relevant to the specific claim being considered. Possible sources include official occupational references; Job descriptions; work assignments; service authorizations; plans; schedules; time and activity records; observations; interviews; supervision and training records; communication and escalation records; billing and payment records; documentation systems; employer or provider records; Result conditions; and contrary Evidence.

No single record should be assumed to control every question. A billing record may show that a unit was paid but not who performed the work. A Job description may show expected duties but not actual duties. A note may describe an activity but not establish Competence, authorization, Result attribution, Evidence Sufficiency, or the absence of contrary conditions.

10.1 Attribution, Assumptions, and Uncertainty

Evidence should be attributable, where material, to the participant, Occupation, Job, Occupational Function, Support Role, Functional Scope, Interaction or Episode, Service Period, Support Service Quality Object, and claim. Declared and actual responsibilities may differ; planned work and performed work may differ; authorized time and actual time may differ; and a Result may have several contributing causes.

Assumptions, missing records, conflicting Evidence, classification limitations, changes over time, and other Uncertainty must remain visible. An Unresolved Condition should not be converted into a favorable conclusion merely because payment occurred, no complaint was recorded, or the service continued.

Responsible attribution requires caution where several workers, organizations, technologies, family members, or external systems contribute to the same Support Result. Evidence should identify what contribution can be supported, what cannot be separated, and where attribution remains uncertain. Unsupported attribution can distort occupational classification, responsibility, funding analysis, and the eventual Quality Claim.

11 Quality State Determination and Claim Discipline

Funding analysis follows rather than replaces Support Service Quality State determination. SCM1 requires a declared object and Claim Boundary, applicable criteria, sufficient Evidence, Evidence-Supported Findings, Quality Factor Interpretation, review of Critical Service Conditions and Non-Compensability, and explicit treatment of Assumptions, Uncertainty, contrary Evidence, and Unresolved Conditions.

A bounded Support Service Quality Claim Statement should identify what service was evaluated, for whom, through which work and role arrangement, during which Service Period, in what Context, against which criteria, on what Evidence basis, under which limitations, and within which Claim Boundary.

Funding or occupational statements may accompany the claim, but their status should remain clear. Examples include: the funded unit did not include documented coordination time; the Job involved functions associated with more than one occupational domain; responsibility for escalation was unclear; or the available Evidence did not allow attribution of a Result to the funded Support Work. These are relevant findings or limitations, not substitutes for the Quality State.

Evidence does not independently determine the Support Service Quality State. Evidence supports bounded findings; findings are interpreted under the applicable Core Quality Factors; Critical Service Conditions and Non-Compensability are reviewed; and only then is the Quality State determined and communicated through a bounded claim. Funding analysis may explain a material condition within that reasoning chain, but it does not replace any stage of it.

12 Controlled Application Sequence

A practical OCF1 analysis may use the following controlled sequence. The sequence makes the architectural dependency explicit: Support Service Quality Object -> Structural Checkpoints -> occupational and functional architecture -> work and responsibility traceability -> funding traceability -> Evidence and Evidence-Supported Findings -> Support Service Quality State determination -> bounded claim -> separate interpretation of funding, price, cost, and value:

1. Declare the Support Service Quality Object, Scale, Service Period, Support Service Arrangement, and intended claim.
2. Identify the applicable official occupational reference or references under ORF1.
3. Record the Jobs, Occupational Functions, Support Roles, Functional Scopes, authorizations, and responsibilities relevant to the object.
4. Identify Blended Occupational Practice, Occupational Time-Sharing, Multiple-Role Practice, coordinated arrangements, and material technology contributions.
5. Describe the Support Work required, assigned, performed, omitted, transferred, or changed and the Support Results expected or observed.
6. Map the funding arrangement to the work, time, intensity, continuity, supervision, coordination, Evidence, and other support conditions it is intended to enable.
7. Identify applicable Core Quality Factors, Core Quality Indicators, Context-Specific Quality Outcome Criteria, and Critical Service Conditions.
8. Collect and evaluate Evidence, including contrary Evidence, attribution limits, Assumptions, Uncertainty, and Unresolved Conditions.
9. Determine the Support Service Quality State and communicate only a bounded claim consistent with SCM1.
10. Analyze price, cost, funding sufficiency, value, and quality-support gaps as separate but connected conclusions.

This sequence makes the dependency visible: occupational and functional description supports work and responsibility traceability; those support Evidence and Quality State determination; and only then can funding, price, and value be interpreted responsibly.

The sequence is dependency-based rather than merely procedural. Occupational and functional description must precede responsible work attribution; work and responsibility traceability must precede interpretation of funding support; and the Evidence-supported Quality State must be established before price, cost, funding sufficiency, or value is used to characterize the service.

13 Implications for Stakeholders

Stakeholder	Traceability question
Person Receiving Support	Is the work needed for the intended service visible, authorized, sufficiently supported, and connected to the person's rights, preferences, needs, and intended Results?
Support Worker	Do the Job, Support Role, Functional Scope, time, Competence expectations, responsibility, and Evidence requirements reflect the work actually expected and performed?
Provider or employer	Can service expectations, staffing, supervision, coordination, technology, documentation, and funding be traced to the functions and Results for which the organization is responsible?
Payer or funder	Does the funded category describe the material work and support conditions, or only an administrative label? What conditions are included, excluded, assumed, or shifted elsewhere?
Regulator or oversight body	Do compliance records reveal the actual service architecture and quality-relevant gaps, or only conformity with administrative requirements?

Stakeholder	Traceability question
Evaluator or certifier	Can Evidence and conclusions be attributed to the correct object, participant, function, role, Service Period, criteria, and Claim Boundary?

14 Conclusion

Funding and pricing systems depend on work that they may not describe clearly. When occupational identity, actual functions, Support Roles, Functional Scopes, responsibilities, time, Results, and Evidence are hidden behind program or payment labels, funding becomes difficult to trace and price becomes difficult to interpret.

Occupational classification provides a stable reference, but classification alone is not enough. The declared Support Service Quality Object must make the actual work arrangement visible, including blended and time-shared functions, role limits, Interfaces, responsibilities, and attribution. Funding can then be mapped to the work and service conditions it is intended to support.

The updated AMSI position is therefore clear: identify the object, occupations, functions, roles, work, responsibilities, and Results; determine the Evidence-supported Support Service Quality State; and then analyze funding, price, cost, value, and quality-support gaps. Funding traceability strengthens accountability, but funding remains an economic and Reference-Layer condition rather than a Quality Indicator or proof of quality.

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