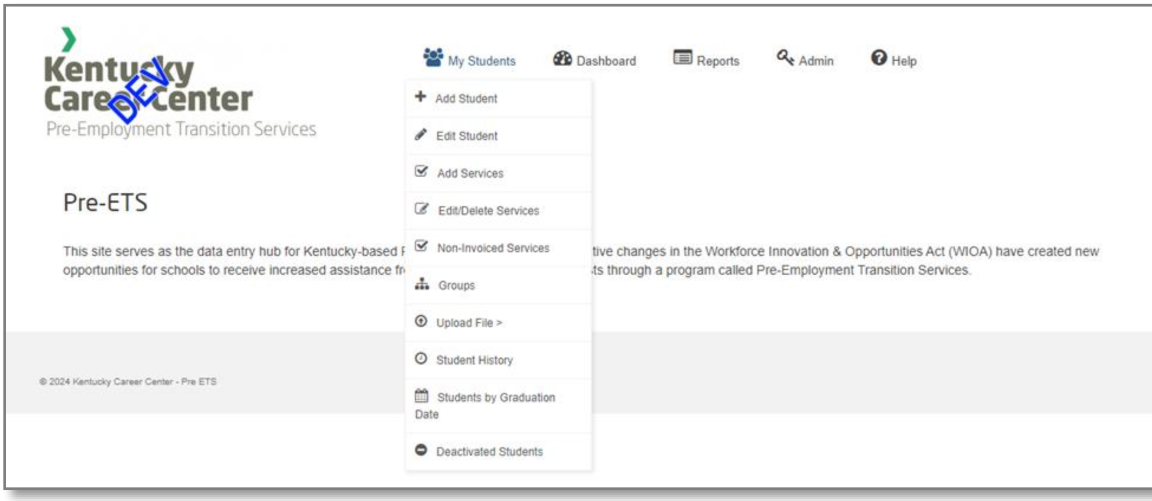
# Pre-VR Guide

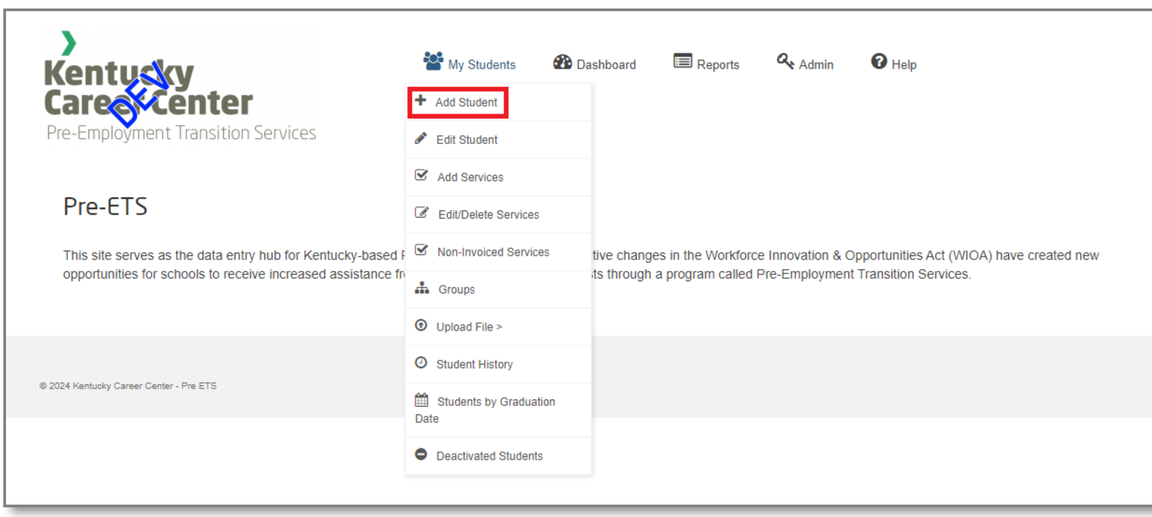
Revised: December 2024

## Add Student

1. Move your cursor to and select **“My Students”** in the main menu/tab

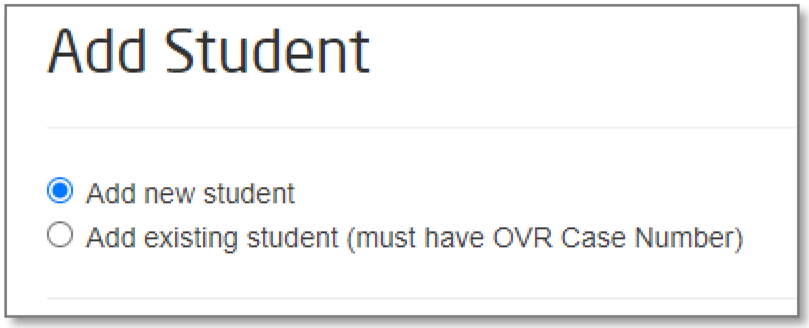



2. Select **“Add Student”**

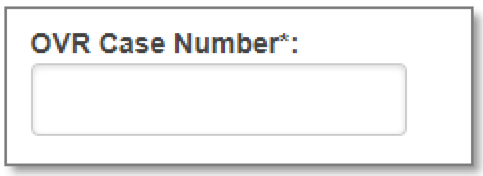



3. Enter Student’s Information

a. Select **“Add new student”** or **“Add existing student (must have OVR Case Number)”** as appropriate




b. **OVR Case Number** – This field does not appear if “Add new student” is selected. Required field if “Add existing student” is selected.




c. **First Name** – Required field.

d. **Middle Name**

e. **Last Name** – Required field.

f. **Gender** – Required field.

g. **Grade** – Required field.

h. **Expected Graduation Date** – Required field.

i. **Type of Degree** – Required field.

j. **Address** – Required field.

    i. The field auto completes with data from google. If there is something doesn’t match exactly, it can cause the submit button at the end to not work.

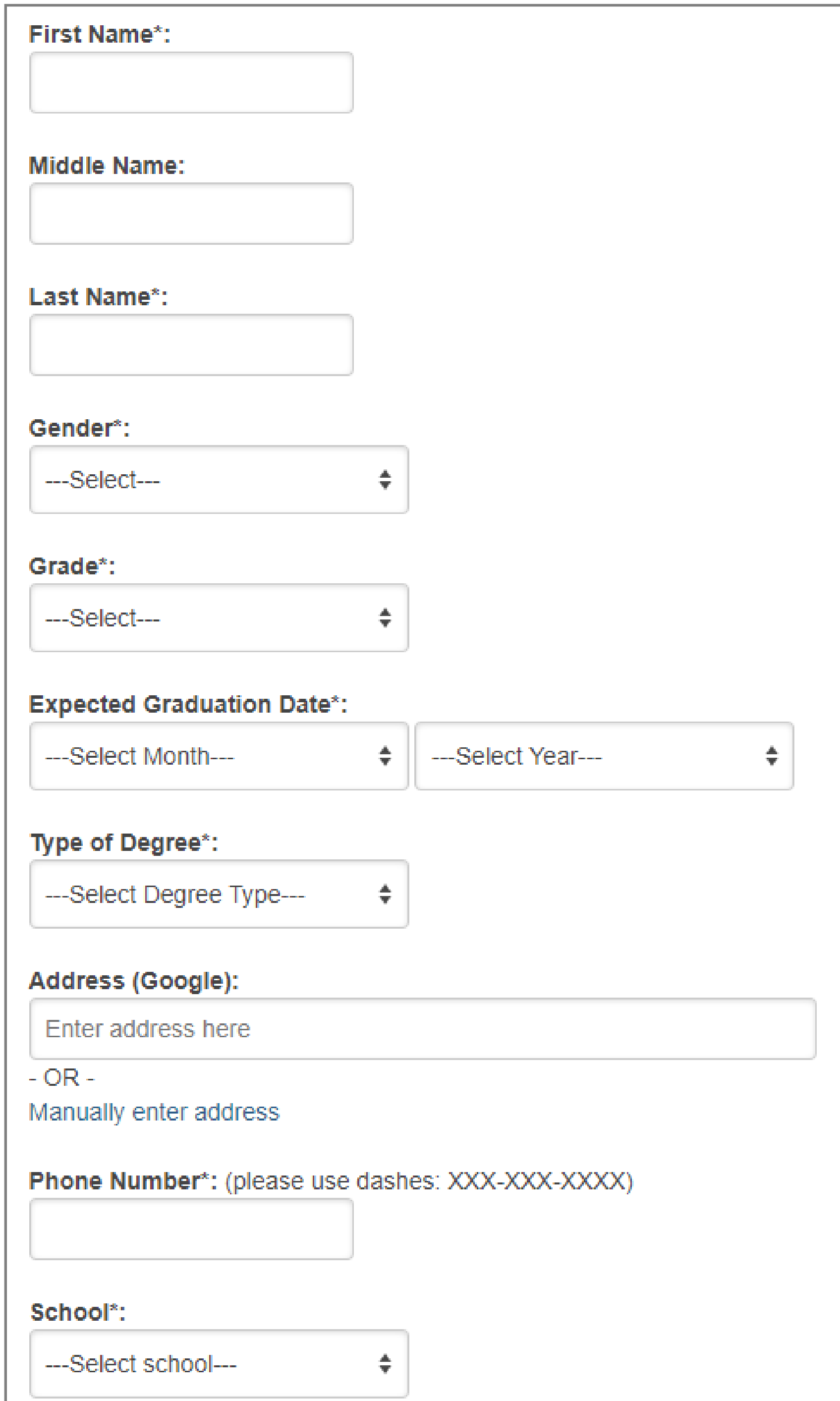
    ii. If there is an issue with the address, you can select **“Manually enter address”** below the address field to complete the address.

k. **Phone Number** – Required field.

l. **School** – Required field.

   i. This list will only show schools that have been assigned to you.

   ii. If you need more schools added to your list, talk with your Coordinator.



**First Name*:**

**Middle Name:**

**Last Name*:**

**Gender*:**

---Select---

**Grade*:**

---Select---

**Expected Graduation Date*:**

---Select Month--- ---Select Year---

**Type of Degree*:**

---Select Degree Type---

**Address (Google):**

Enter address here

- OR -

Manually enter address

**Phone Number*:** (please use dashes: XXX-XXX-XXXX)

**School*:**

---Select school---

m. **Secondary Student ID**

n. **Date of Birth** – Required field

i. Make sure to change the year before selecting the day.

o. **Race** – Required field.

p. **Ethnicity** – Required field.

q. **Documentation** – Required field if “Add new student” is checked. This does not appear if “Add existing student” is selected.

    i. Once an option is selected, a Choose File option will appear.

    ii. Select to upload the file.

    iii. There is a 5MB size limit and needs to be a PDF.

r. **Sensory Disabilities** – Required field.

    i. If **“Deaf/Hard of Hearing”** or **“Both”** is selected, a **“Preferred Communication Method”** field will appear.

s. **Referral Source** – Required field.

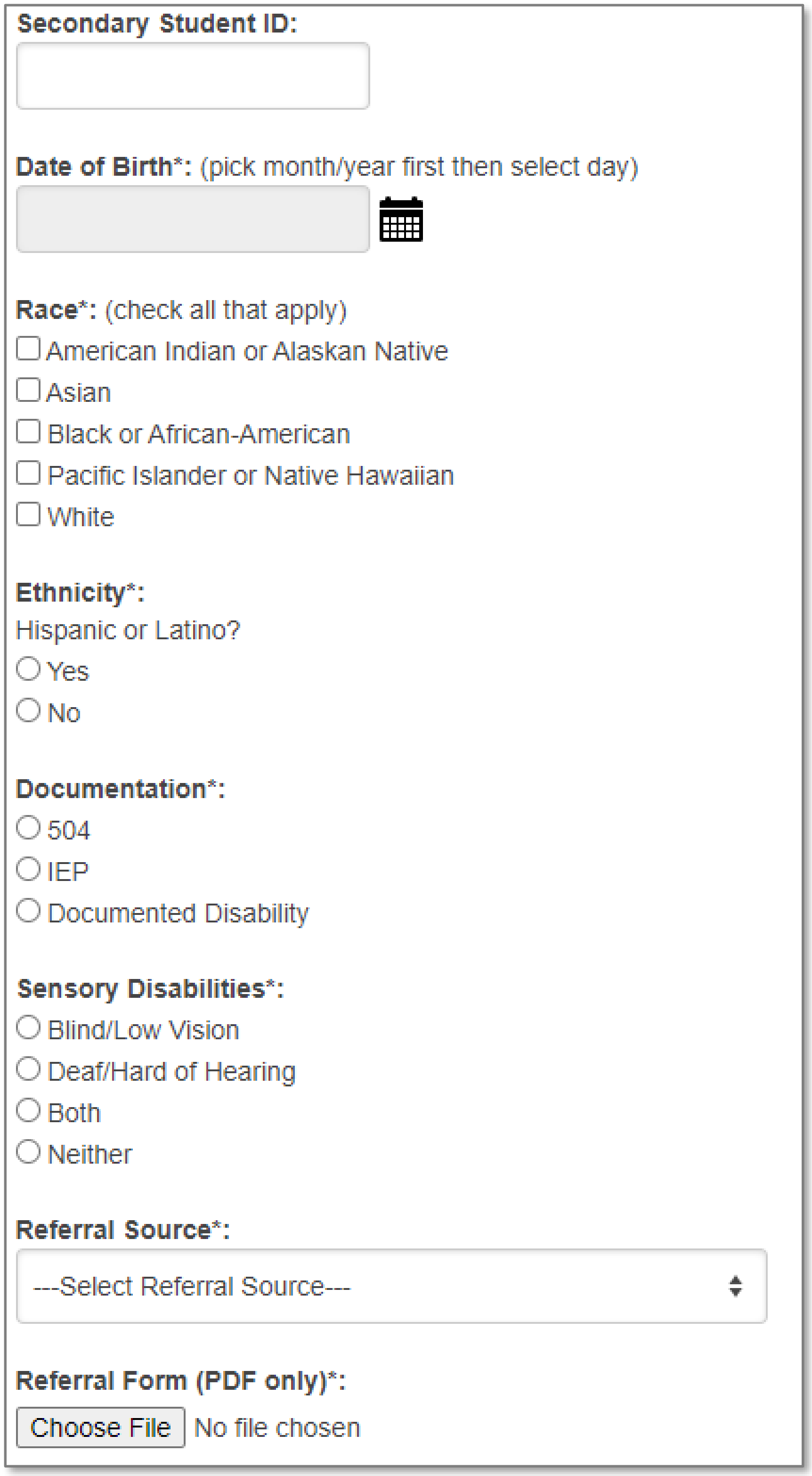
    i. If an existing student, select **“Other source”**.

    ii. Enter the counselor’s name in the **“Please add other sources here”** field.

t. **Referral Form** – Required field if **“Add new student”** is selected. This does not appear if **“Add existing student”** is selected.

    i. Select the **“Choose File”** button to upload the file.

ii. There is a 5MB size limit and needs to be a PDF.



**Secondary Student ID:**

**Date of Birth*:** (pick month/year first then select day)

**Race*:** (check all that apply)

- ☐ American Indian or Alaskan Native
- ☐ Asian
- ☐ Black or African-American
- ☐ Pacific Islander or Native Hawaiian
- ☐ White

**Ethnicity*:**

Hispanic or Latino?

- ○ Yes
- ○ No

**Documentation*:**

- ○ 504
- ○ IEP
- ○ Documented Disability

**Sensory Disabilities*:**

- ○ Blind/Low Vision
- ○ Deaf/Hard of Hearing
- ○ Both
- ○ Neither

**Referral Source*:**

---Select Referral Source---

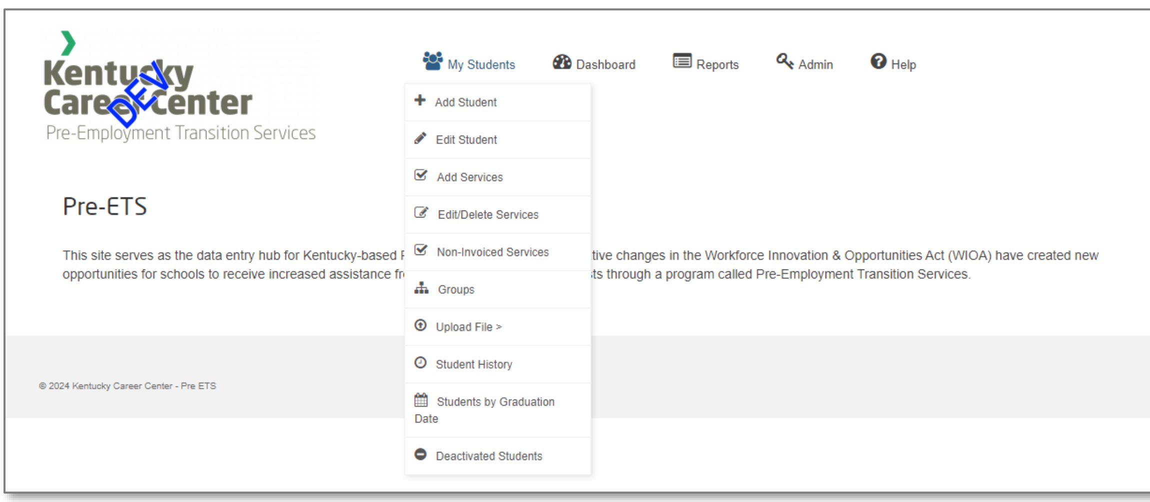
**Referral Form (PDF only)*:**

Choose File No file chosen

4. Select **"Add Student"** button.
5. Once submitted the coordinator will review and either approve or deny the student for services within 5 business days.
    a. Coordinator will receive an email from the system once the student is submitted.
    b. The provider will receive an email telling them if the student was approved or denied.
        i. If denied, the reason will be in the email.
        ii. Reach out to the coordinator if additional information is needed.

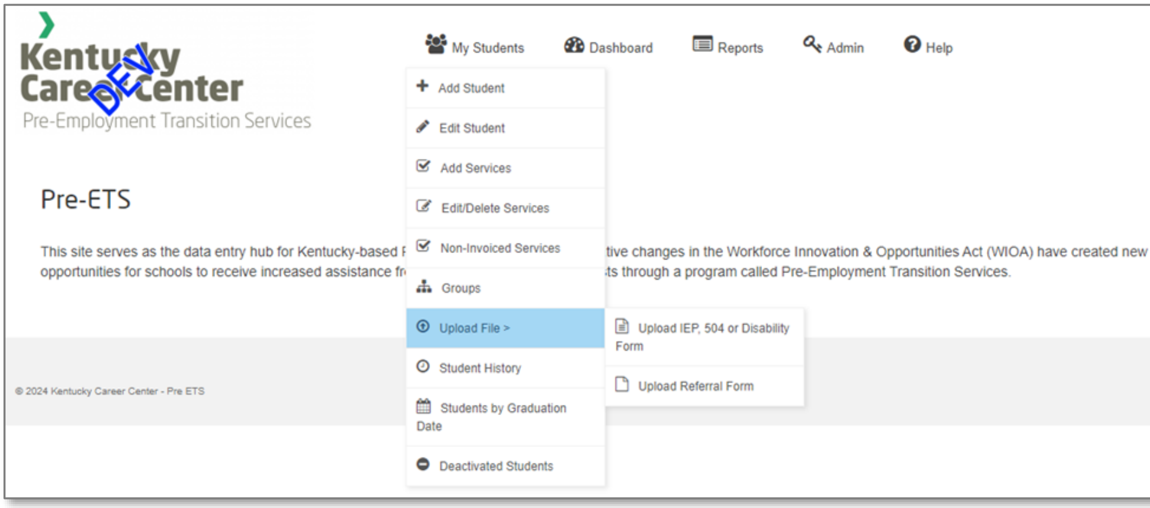
## Upload Corrected Documentation

1. Move your cursor to and select **"My Students"** in the main menu/tab




2. Select or move cursor to **"Upload file"**

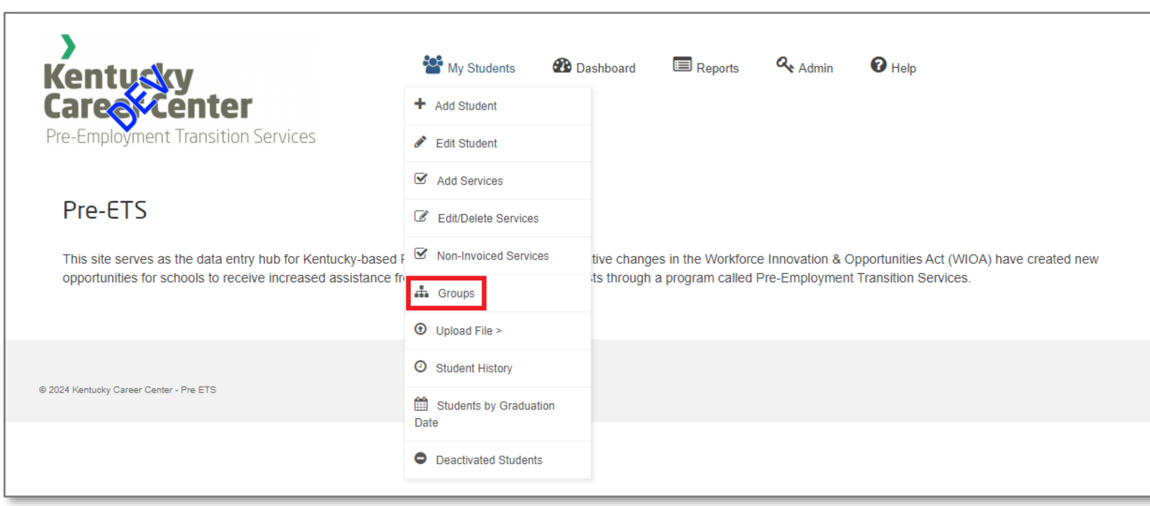
3. Select **“Upload IEP, 504 or Disability Form”** or **“Upload Referral Form”**



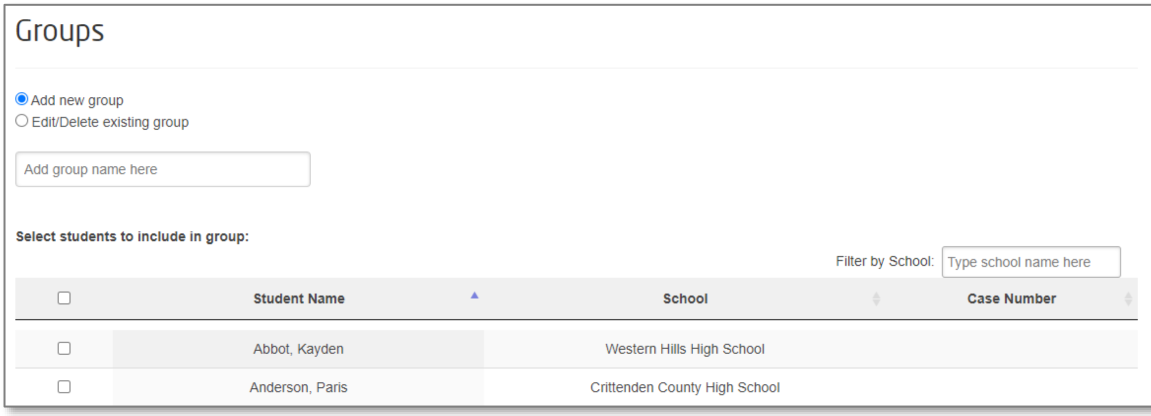

4. **Filter by Building(s)** will let you limit which schools you are looking at.
5. Select Student from the list.
6. Select the documentation type.
7. Select **“Choose File”** to upload the document.

## Create Groups

1. Move your cursor to or select **“My Students”**
2. Select **“Groups”**



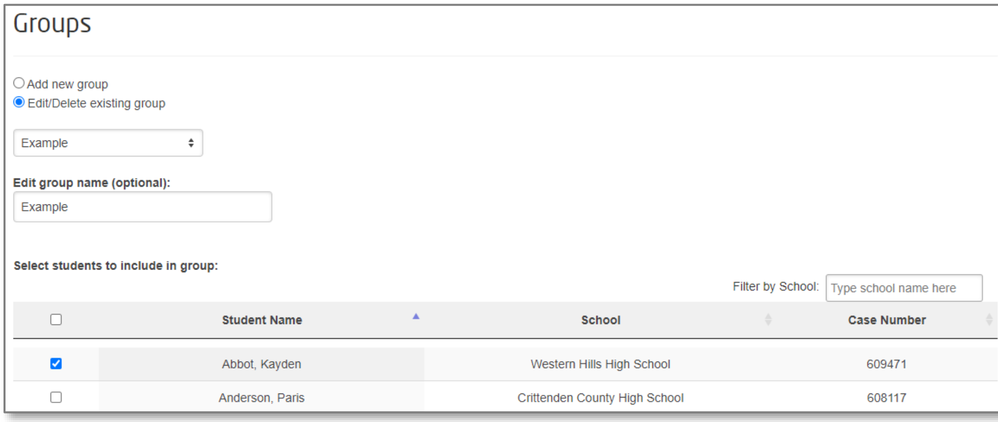
3. **“Add New group”** is the default option.
4. Enter the name for the new group in the text field.
5. Check the names of the students you want in the group.
6. Select **“Save”**




## Edit Groups

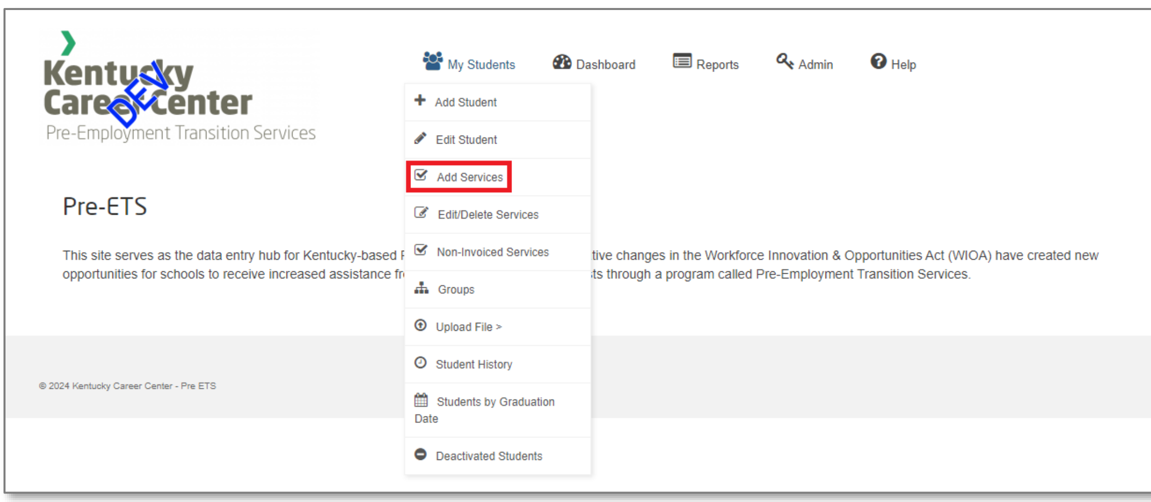
1. Move your cursor to and select **“My Students”**
2. Select **“Groups”**
3. Select **“Edit/Delete Group”**
4. Select the name of the group from the drop box.
5. You can change the group name.
6. Check or uncheck students to add/remove them from the group.
7. Select **“Save”** to save changes.

a. The **"Delete"** button will remove the group.



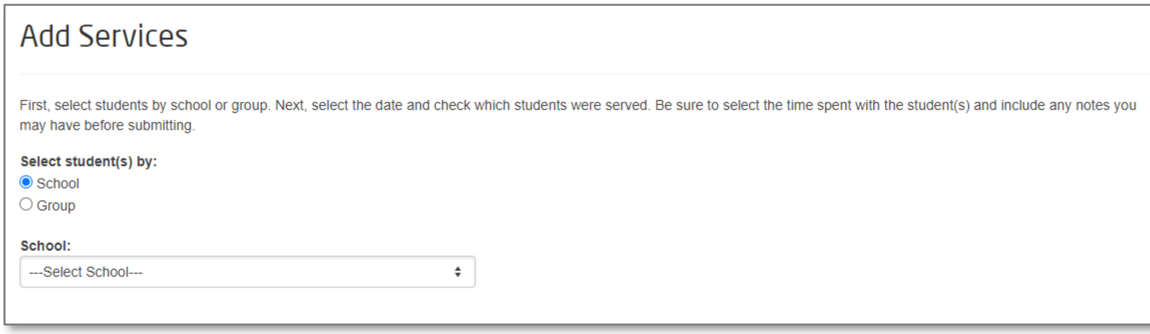

## Add Services

1. Move your cursor over and select **"My Students"**
2. Click **"Add Services"**

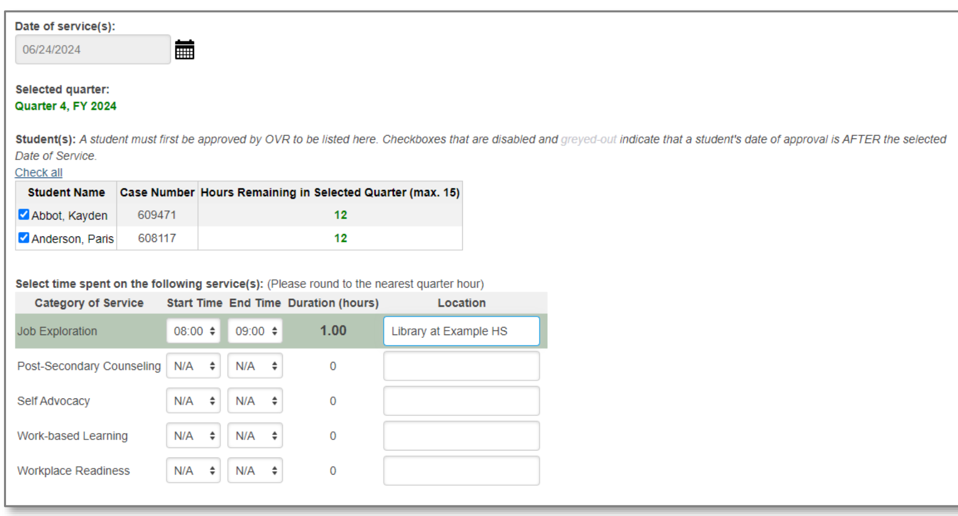



3. Click **"School"** or **"Group"**

4. Choose the School or Group from the dropdown box.



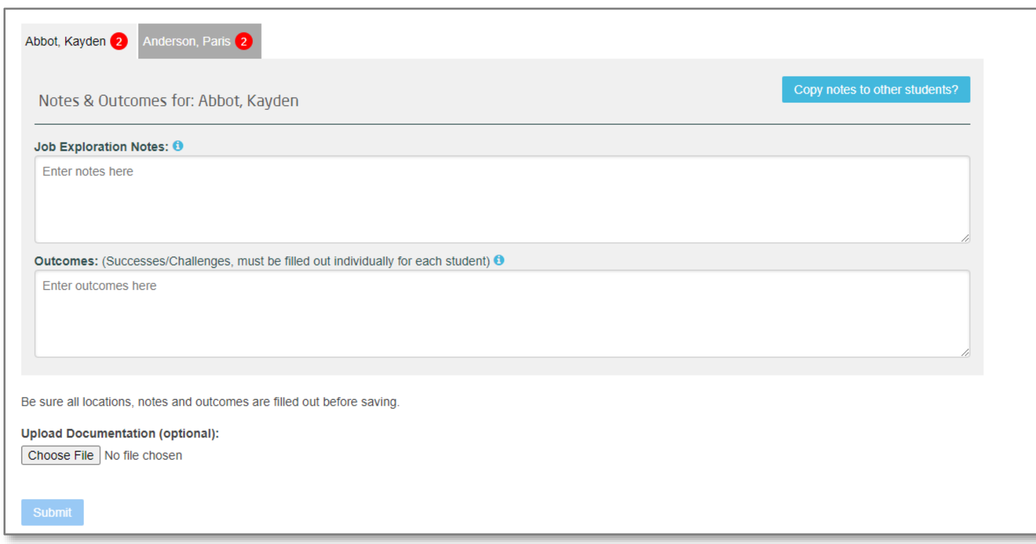

5. Pick the date of service.
    a. The dates can select today back to the start of the month.
    b. Through the end of the 5th, services dates from the previous month can be entered.
6. Check the box next to the students who are in the service.
7. Pick the start and end time for the different categories of service.
8. For each service category in use, enter a location.
    a. The location should be specific.
        i. Correct – *"Library at X school"*.
        ii. Incorrect – *"School"*




9. Enter notes and outcomes for the services.

   a. The **“i”** in the blue circle next to notes and outcomes gives recommendation on what to fill in.
   b. If there are multiple students, you can use the **“Copy notes to other students’”** button.
   c. Outcomes still need to be to be filled out per student.

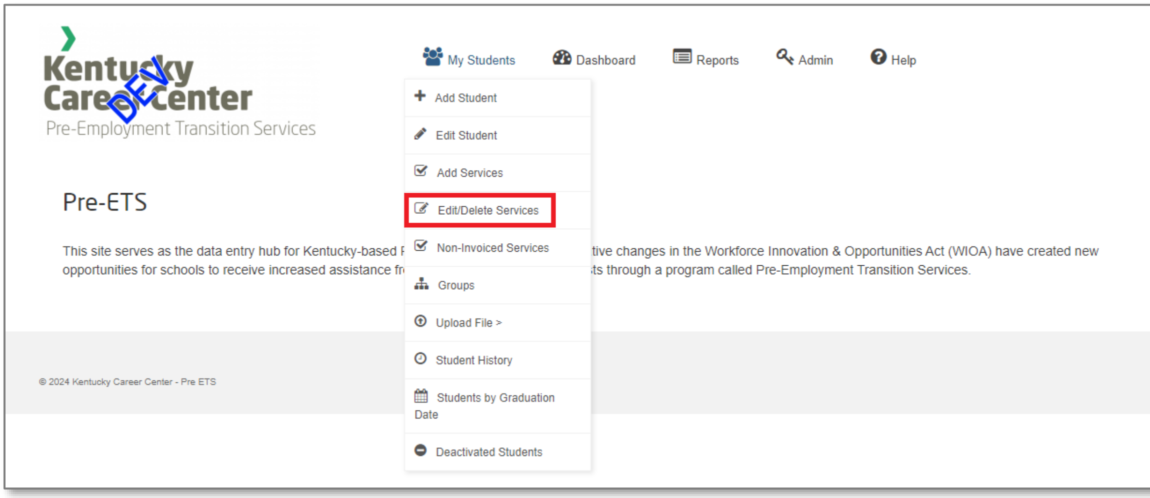
10. **“Upload Documentation (optional)”** lets you upload a service-related document.
    a. Document size is limited to 5mb.
11. Select the **“Submit”** button.
    a. There is a popup to let you know the note was submitted, which reads: **“Services Submitted Successfully!”**.



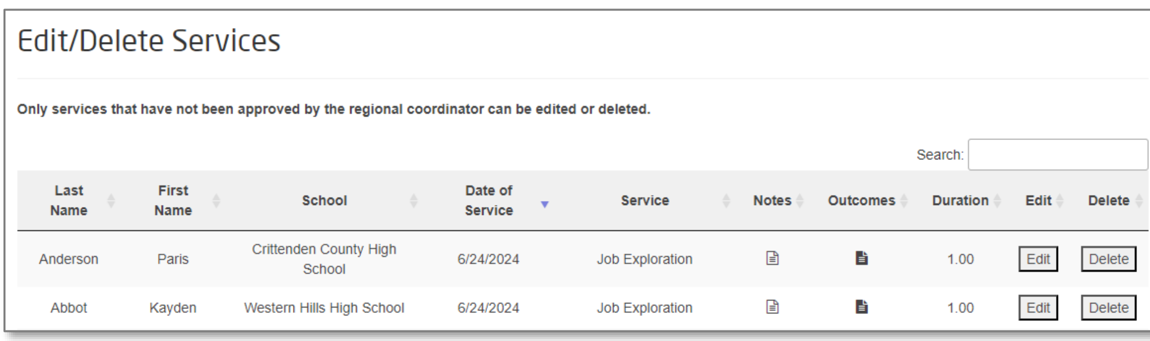

## Edit Services

1. Mover cursor to and select **“My Students”**

2. Select **“Edit/Delete Services”**




3. A list of services you have entered will be displayed.
   a. Only services that have not been approved by the coordinator can be edited or deleted.
   b. There is a search field to narrow down the service you are looking for.
4. Find the service you want to modify and select the **“Edit”** button.



Edit/Delete Services

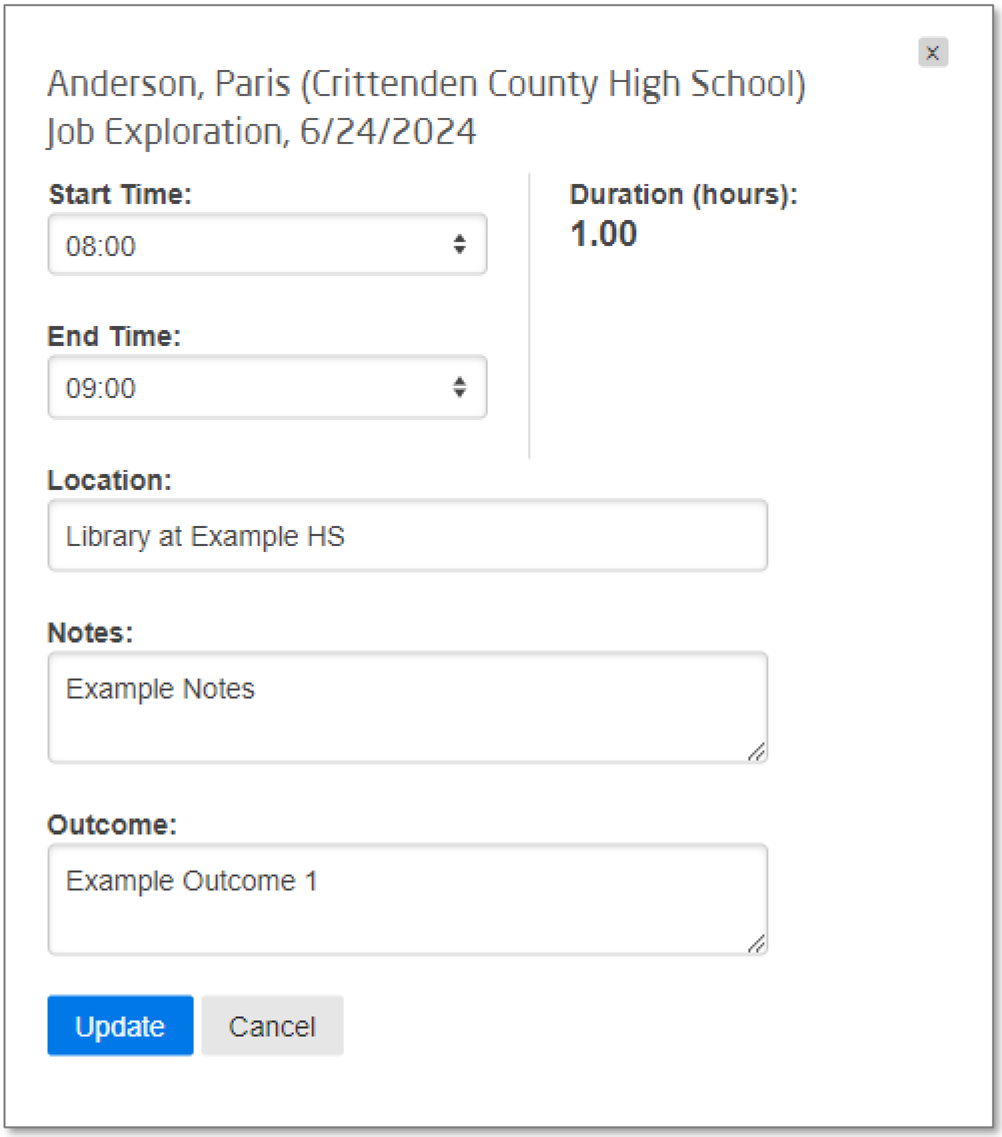
Only services that have not been approved by the regional coordinator can be edited or deleted.

Search:

| Last Name | First Name | School | Date of Service | Service | Notes | Outcomes | Duration | Edit | Delete |
|---|---|---|---|---|---|---|---|---|---|
| Anderson | Paris | Crittenden County High School | 6/24/2024 | Job Exploration | | | 1.00 | Edit | Delete |
| Abbot | Kayden | Western Hills High School | 6/24/2024 | Job Exploration | | | 1.00 | Edit | Delete |

5. A popup will appear that will let you change:
   a. **Start time**
   b. **End time**
   c. **Location**
   d. **Notes**
   e. **Outcomes**

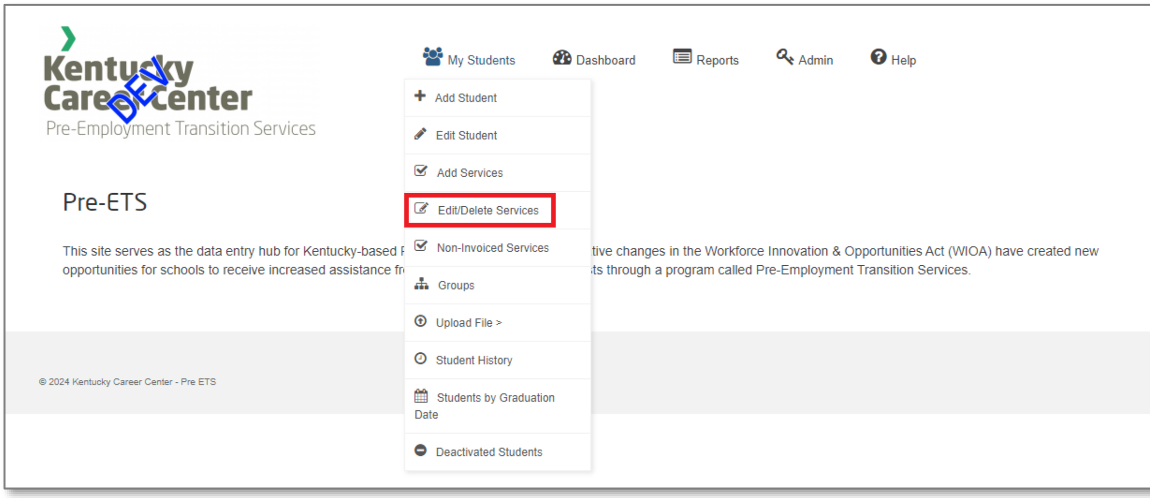
6. Services dates and categories cannot be edited and require the service to be deleted and readded.
7. Once done, select **“Update”** to save changes.
    a. When complete it will give a popup that reads, **“Service updated!”**
    b. The **“Cancel”** button will exit without saving.



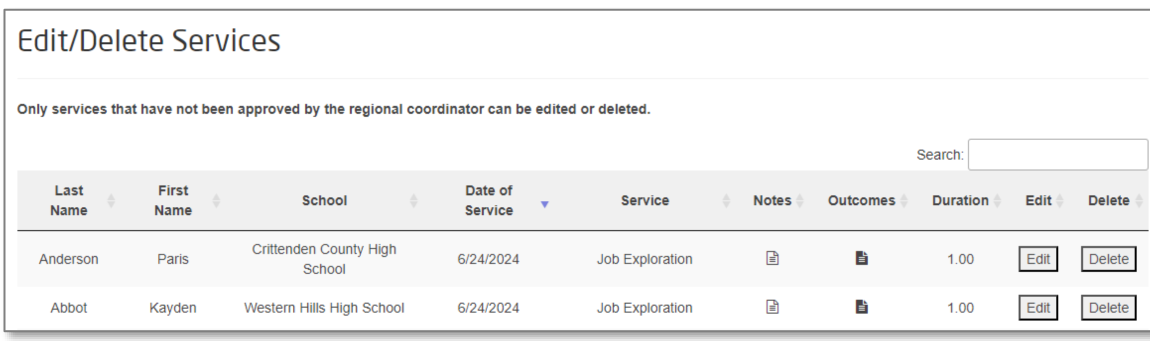

## Delete Services

1. Move cursor to and select **“My Students”**

2. Select **"Edit/Delete Services"**




3. A list of services you have entered will be displayed.
    a. Only services that have not been approved by the coordinator can be edited or deleted.
    b. There is a search field to narrow down the service you are looking for.
4. Find the service you want to delete.



Edit/Delete Services

Only services that have not been approved by the regional coordinator can be edited or deleted.

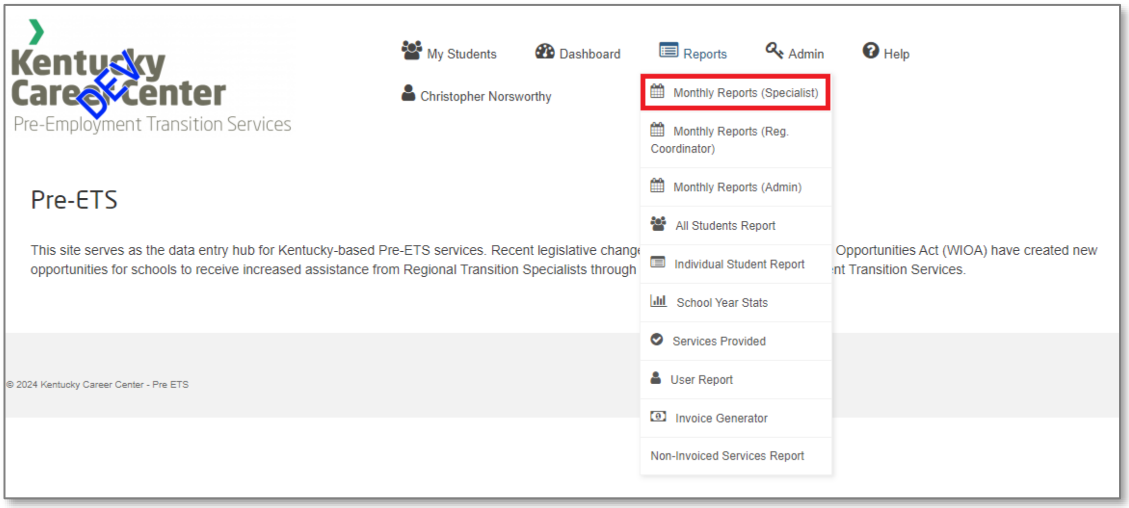
Search:

| Last Name | First Name | School | Date of Service | Service | Notes | Outcomes | Duration | Edit | Delete |
|---|---|---|---|---|---|---|---|---|---|
| Anderson | Paris | Crittenden County High School | 6/24/2024 | Job Exploration | | | 1.00 | Edit | Delete |
| Abbot | Kayden | Western Hills High School | 6/24/2024 | Job Exploration | | | 1.00 | Edit | Delete |

5. Select the **"Delete"** button.
    a. A pop up will appear with the message, **"Are you sure you want to completely delete this record?"**
    b. The **"ok"** button will delete the record and give a pop up that reads, **"Service deleted!"**
    c. The **"Cancel"** button will exit without deleting.

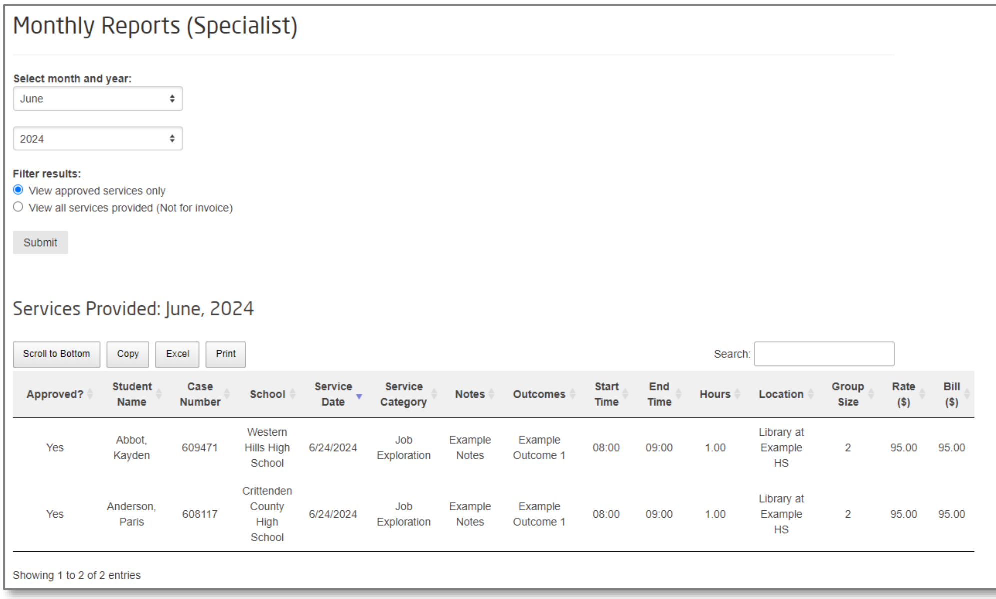
# Reports

1. Move cursor to and select **"Reports"**.
2. Select **"Monthly Reports (Specialist)"**.



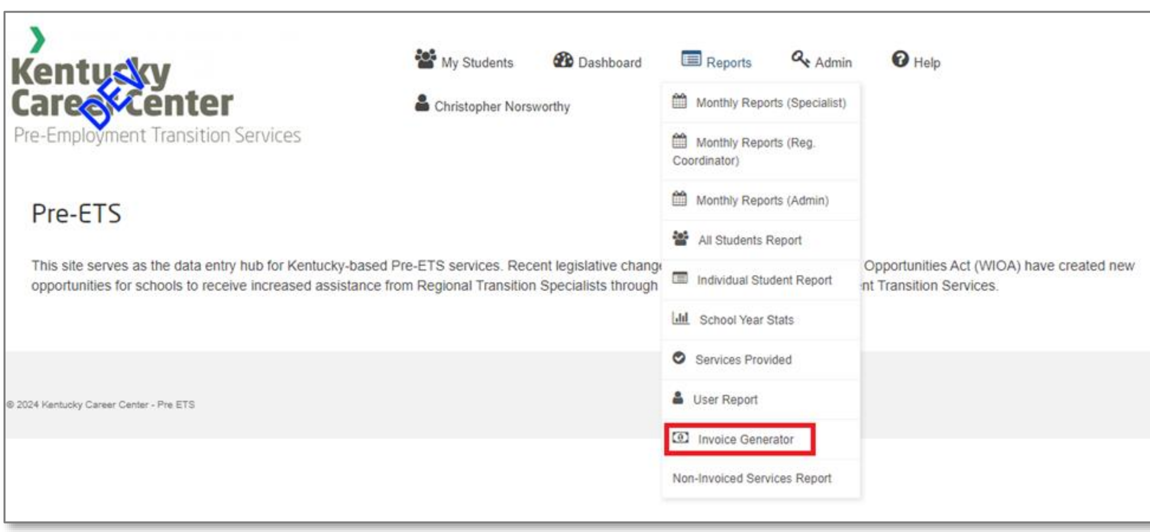

3. Select Month and Year from the dropdowns.
4. **"View approved services only"** is the default option.
5. Select **"Submit"**.
6. Select the Excel button to download it.
    a. This will only show data that you entered.

b. If you have multiple specialists, the data will need to be combined manually for the invoice.



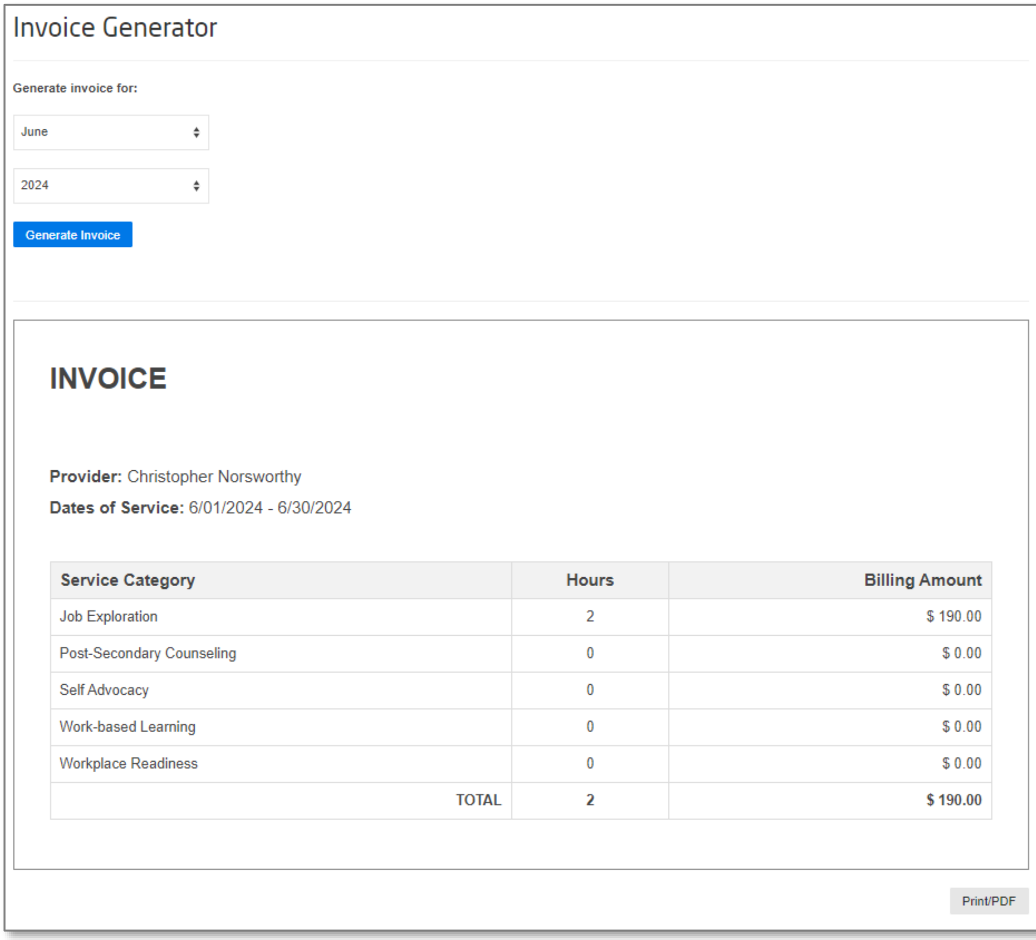

## Invoice Generator

1. Move cursor to and select **"Reports"**
2. Select **"Invoice Generator"**




3. Select Month and Year from the dropdowns.
4. Select **"Generate Invoice"**

5. Select **“Print/PDF”**
    a. This will only show data that you entered.
    b. If you have multiple specialists, the data will need to be combined manually for the invoice.


Invoice Generator

Generate invoice for:

June

2024

Generate Invoice

**INVOICE**

**Provider:** Christopher Norsworthy

**Dates of Service:** 6/01/2024 - 6/30/2024

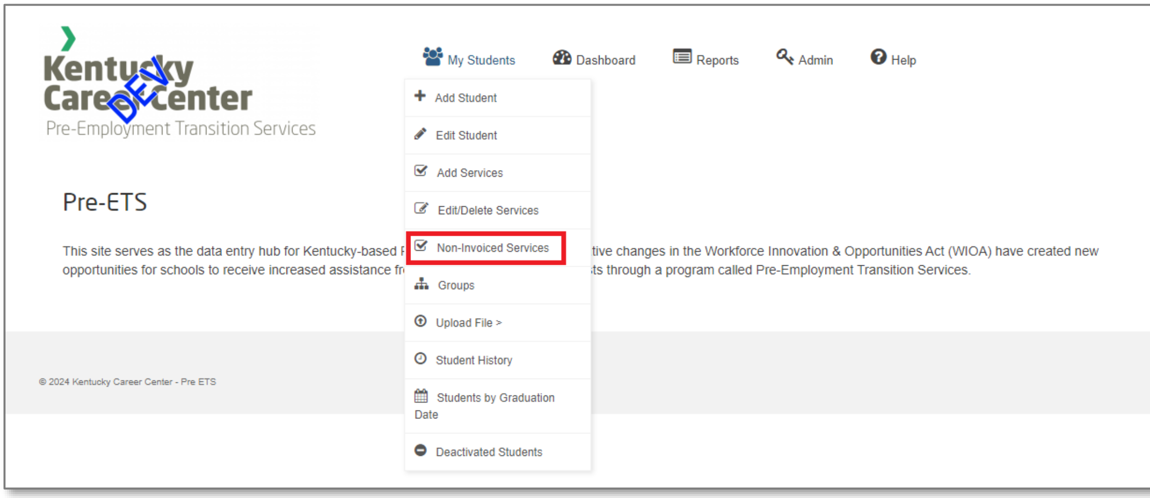
| Service Category | Hours | Billing Amount |
|---|---|---|
| Job Exploration | 2 | $ 190.00 |
| Post-Secondary Counseling | 0 | $ 0.00 |
| Self Advocacy | 0 | $ 0.00 |
| Work-based Learning | 0 | $ 0.00 |
| Workplace Readiness | 0 | $ 0.00 |
| TOTAL | **2** | **$ 190.00** |

Print/PDF

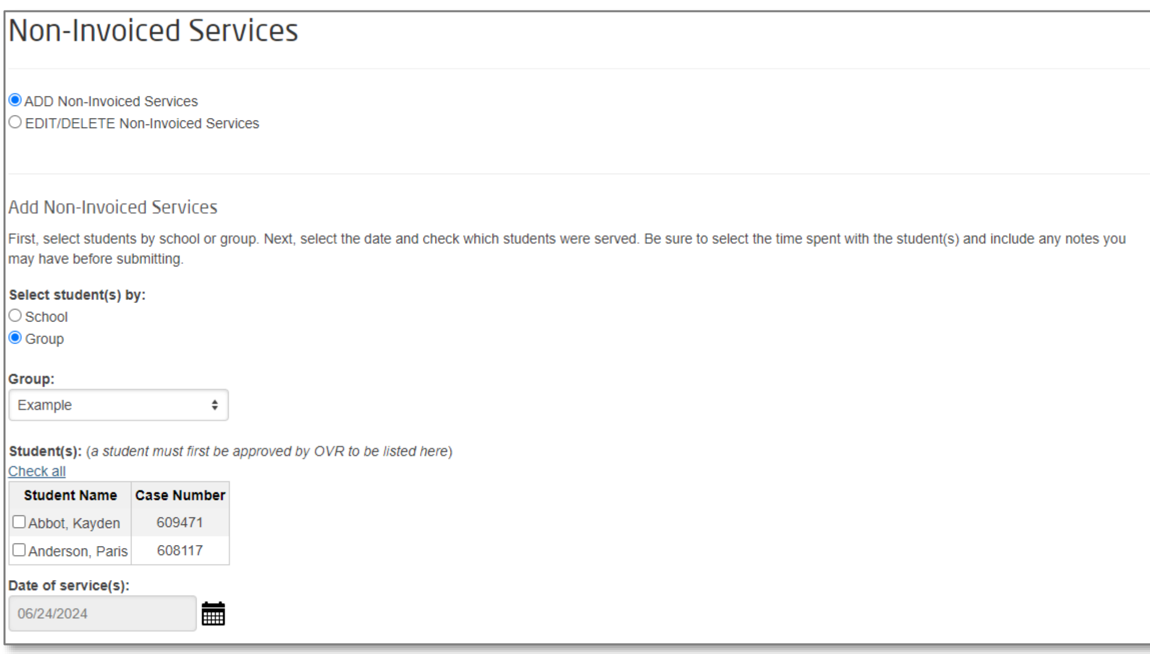
## Add Non-Invoiced Services

1. Move cursor to and select **“My Students”**

2. Select **“Non-Invoiced Services”**



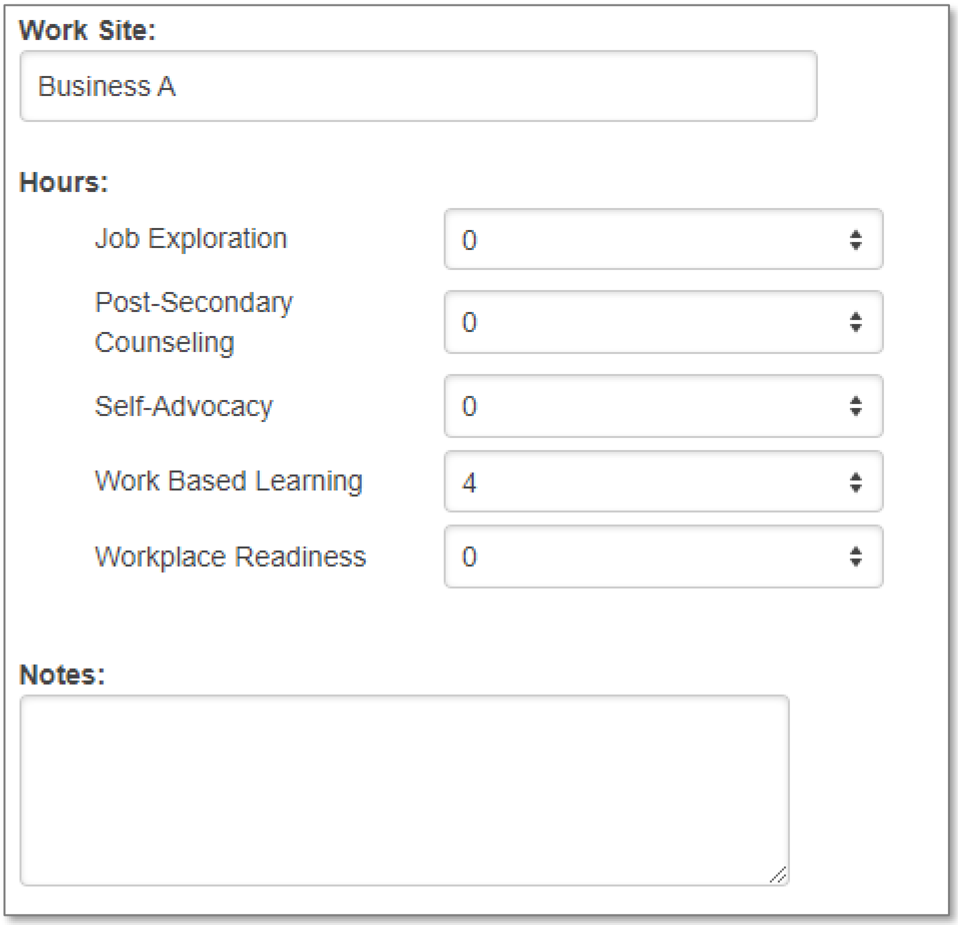

3. ADD Non-Invoiced Services is the default option.
4. Select School or Group
5. Choose the School or Group from the dropdown box.
6. Check the student(s) who participated in the service.
7. Select the Date of services.




8. Enter the **“Work Site”**

9. Enter the number of hours for each service category.

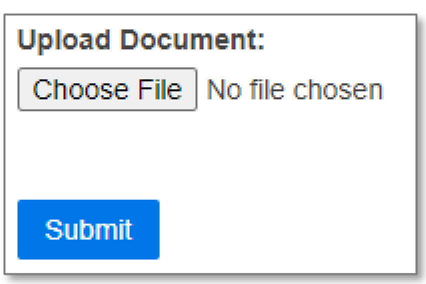
10. Enter any notes.




11. The **"Upload Documentation"** button lets you upload a service-related document.
    a. Document size is limited to 5mb.

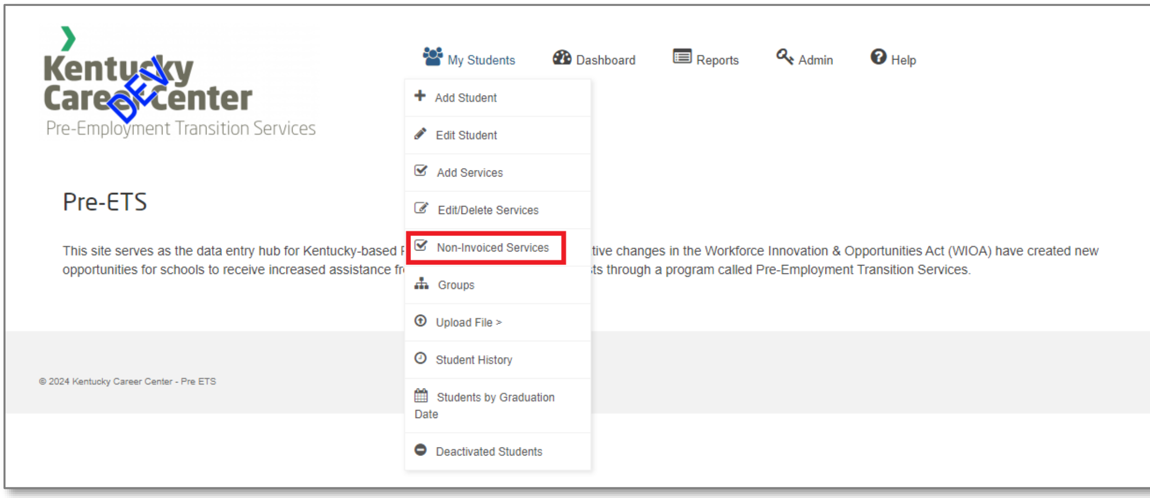
12. Select **"Submit"**

13. A popup will appear with the message **"Services submitted Successfully!"**

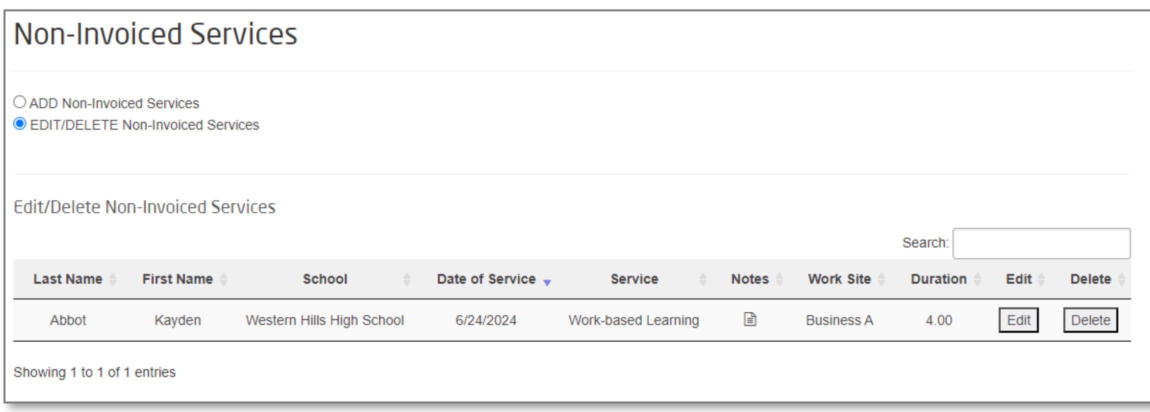


# Edit Non-Invoiced Services

1. Move cursor to and select **“My Students”**
2. Select **“Non-Invoiced Services”**



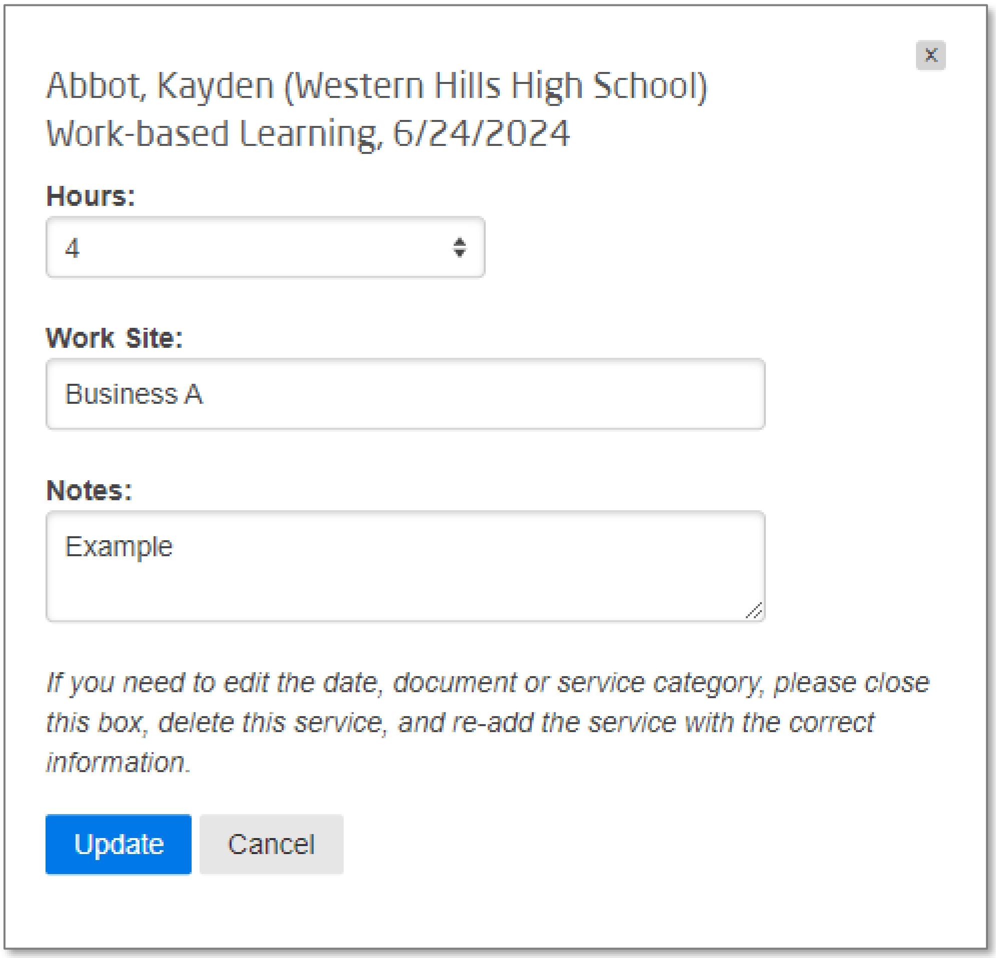

3. Select **“Edit/Delete Non-Invoiced Services”**
4. Find the service you want to modify and select the **“Edit”** button.




5. A popup will appear that will let you change:
   a. **Hours**
   b. **Work Site**
   c. **Notes**
6. The **“Update”** button will save.

a. A popup will appear that reads, **“Service Updated!”**

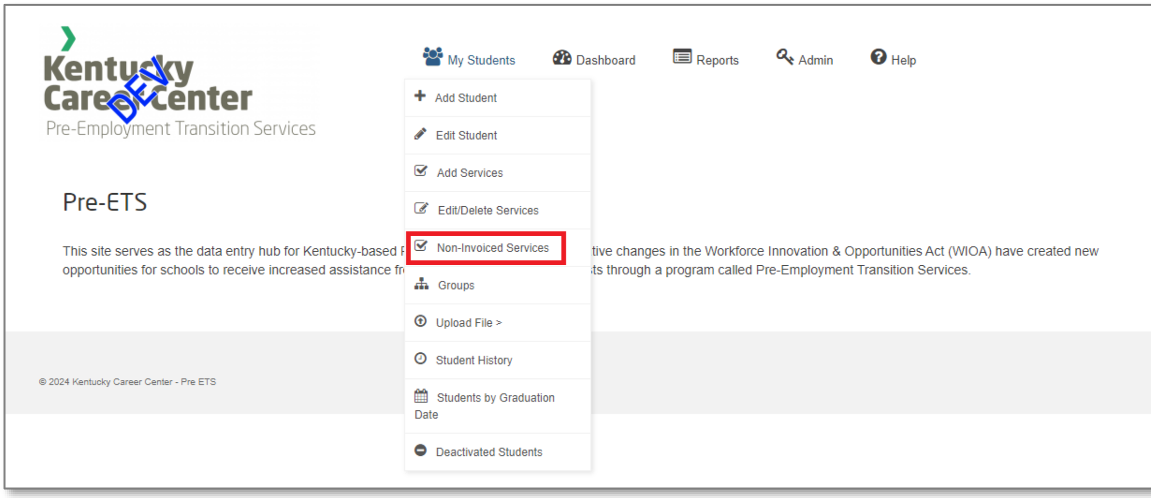
7. The **“Cancel”** button will exit without saving.




## Delete Non-Invoiced Services

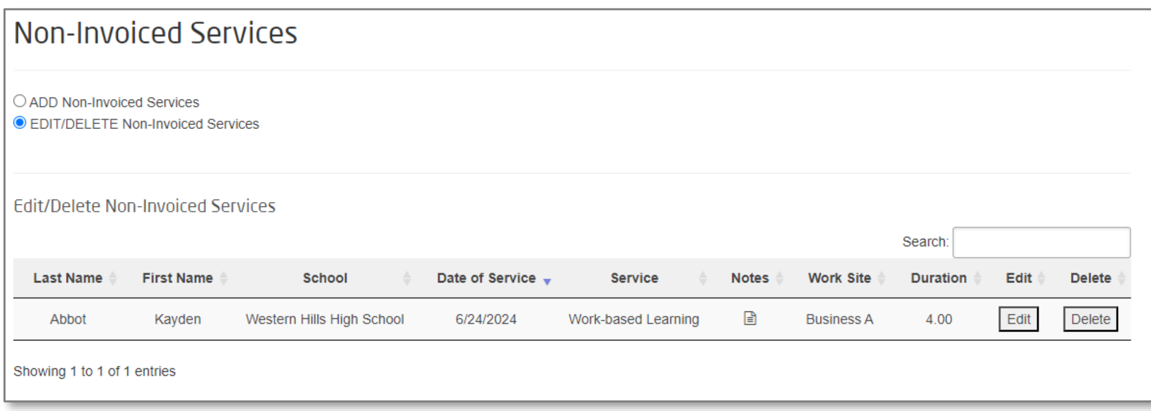
1. Move cursor to and select **“My Students”**

2. Select **“Non-Invoiced Services”**




3. Select **“Edit/Delete Non-Invoiced Services”**

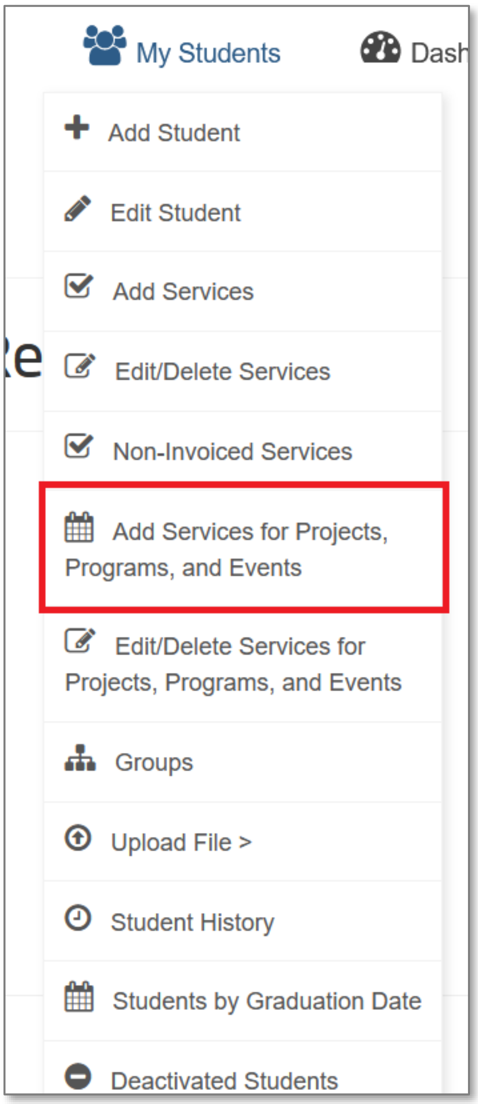
4. Find the service you want to modify and click the Delete button.




5. A popup will appear that says, **“Are you sure you want to delete this service?”**
   a. **“Ok”** will delete the service.
      i. A popup will appear that reads, **“Service Deleted!”**
   b. **“Cancel”** will exit without saving.

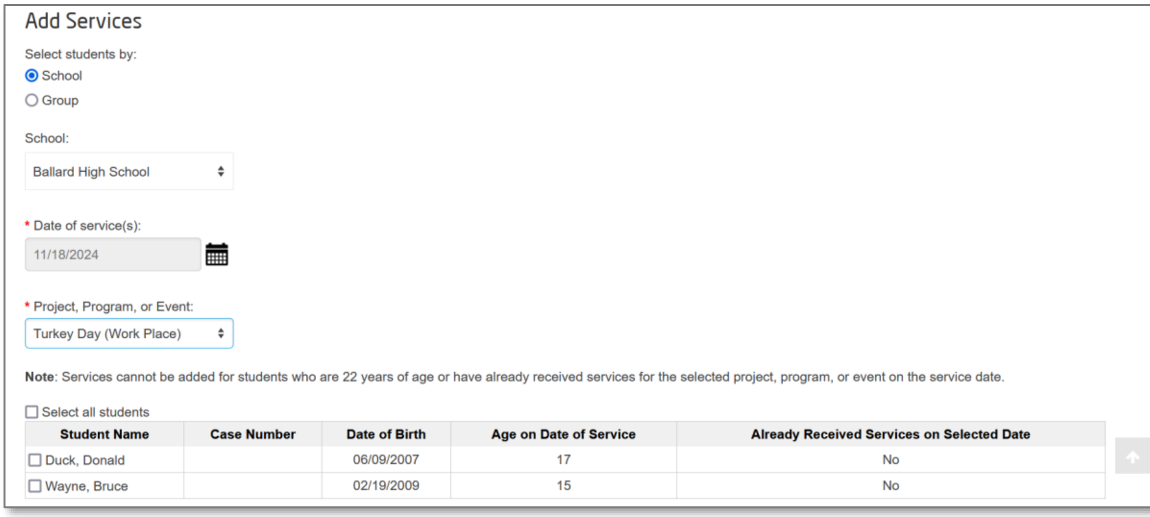
## Add Projects, Programs, and Events

1. Send in a proposal for a special event to [ovrtsb@ky.gov](mailto:ovrtsb@ky.gov) for approval.
2. Once the contract is made and signed, OVR staff will create the event in Pre-VR.
3. Once added, go to My Students > Add Services for Projects, Programs, and Events




4. Select School or Group.
5. Select the school or group from the drop-down.

6. Select date of service.
7. Select the Project, Program, or Event from the drop-down.
8. Select the students that attended.



Add Services

Select students by:

(•) School

( ) Group

School:

Ballard High School

* Date of service(s):

11/18/2024

* Project, Program, or Event:

Turkey Day (Work Place)

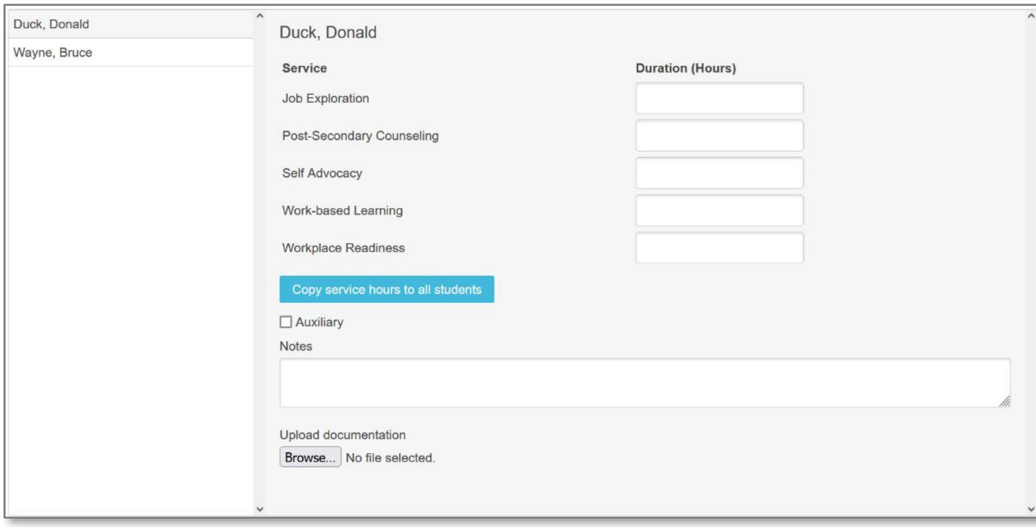
**Note**: Services cannot be added for students who are 22 years of age or have already received services for the selected project, program, or event on the service date.

☐ Select all students

| Student Name | Case Number | Date of Birth | Age on Date of Service | Already Received Services on Selected Date |
|---|---|---|---|---|
| ☐ Duck, Donald | | 06/09/2007 | 17 | No |
| ☐ Wayne, Bruce | | 02/19/2009 | 15 | No |

9. Enter the data for the students:
   a. Enter hours for the services received on that day for each student.
      i. The Copy service hours to all students' buttons can be used to duplicate the data.
         1. This will not copy the auxiliary check box or notes field.
   b. If the student received auxiliary services per the contract, check the auxiliary box for that student.
      i. If the auxiliary box is checked, the notes field needs to be completed to explain why.
      ii. Other notes maybe entered for the student if extra details are needed.

c. Upload a pdf for the event, per the contract.



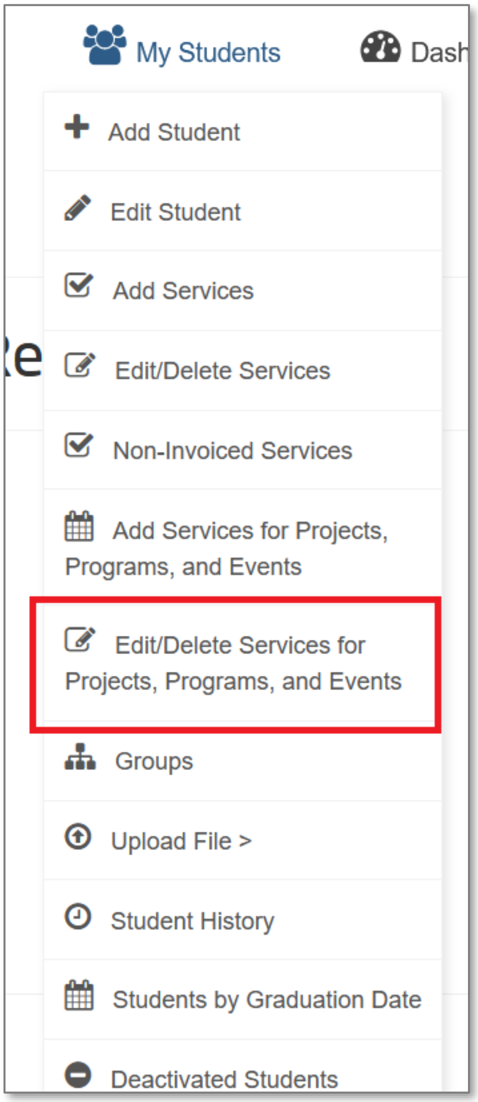

10. Press the **“Submit”** button.

    a. A page will load that reads **“Submission Received”**.

11. If you have additional days or students to add more services to the event, you can select the **“Add more services for projects, programs, and events”** link.

## Edit Projects, Programs, and Events

1. Select **My Students > Edit/Delete Projects, Programs, and Events**




2. Select the services you wish to edit.

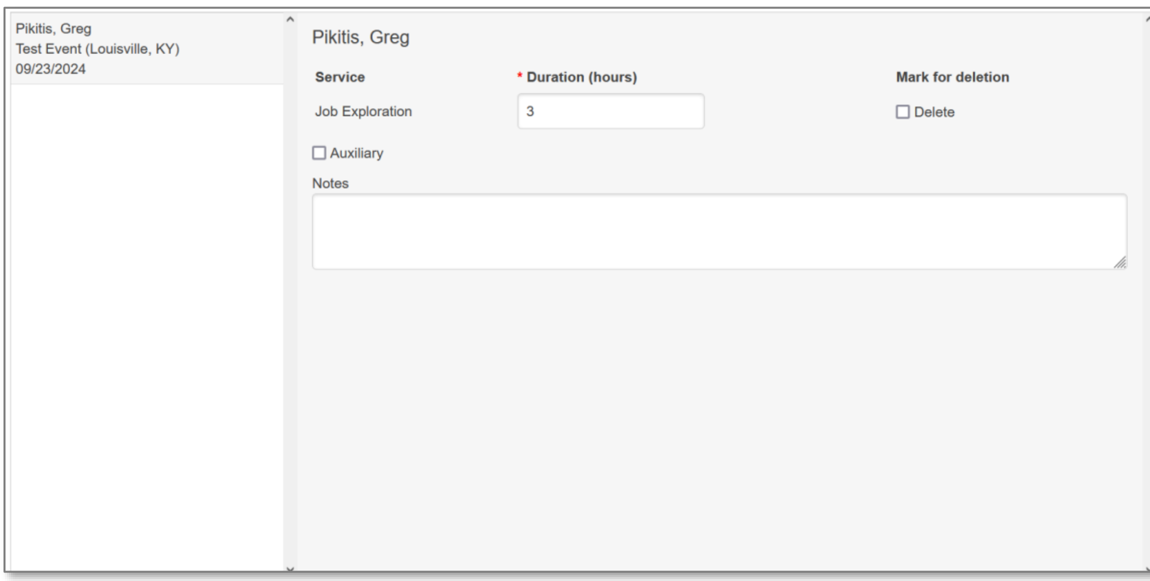
a. You can search the services to help find what you are looking for.


Edit/Delete Services

Search:

| Student Name | School | Service Date | Project, Program, or Event | Auxiliary | Services | Notes |
|---|---|---|---|---|---|---|
| Pikitis, Greg | LaRue County High School | 09/23/2024 | Test Event (Louisville, KY) | | Job Exploration | |
| Clampett, Elly May | Leslie County High School | 09/23/2024 | Test Event (Louisville, KY) | | Job Exploration,Self Advocacy,Workplace Readiness | |
| Liotta, Ray | Larry A. Ryle High School | 09/23/2024 | Test Event (Louisville, KY) | | Job Exploration,Work-based Learning | |
| Griswald, Audrey | Larry A. Ryle High School | 09/23/2024 | Test Event (Louisville, KY) | | Job Exploration,Work-based Learning | |
| Earl, Harley | Larry A. Ryle High School | 09/23/2024 | Test Event (Louisville, KY) | | Job Exploration,Work-based Learning | |

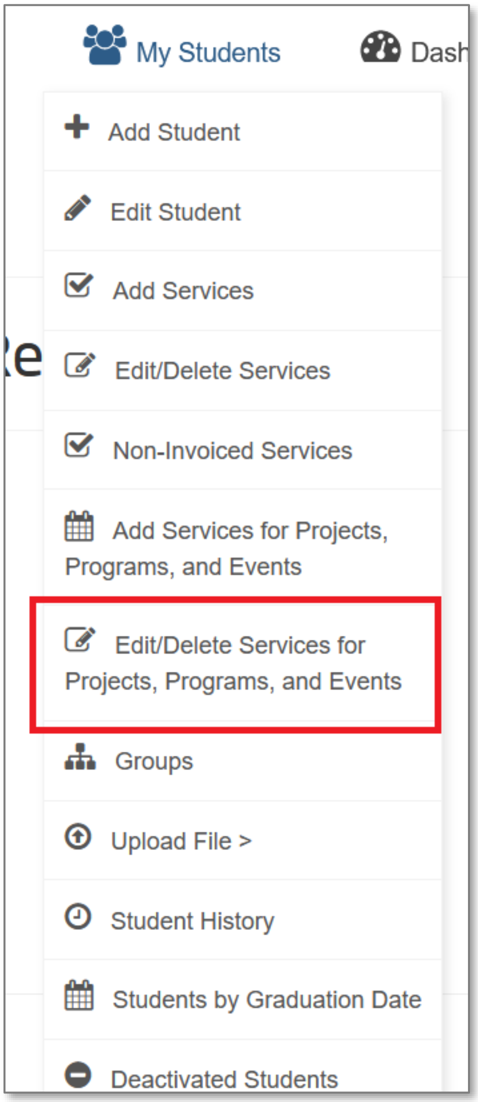
3. Scroll down and you will be able to edit the hours, auxiliary box, and notes field.




4. Select **“Save Changes”** when done.
   a. A pop up will appear that reads **“Changes saved successfully”**.
   b. Select **“OK”**.

## Delete Projects, Programs, and Events

1. Select **My Students > Edit/Delete Projects, Programs, and Events**




2. Select the services you wish to delete.

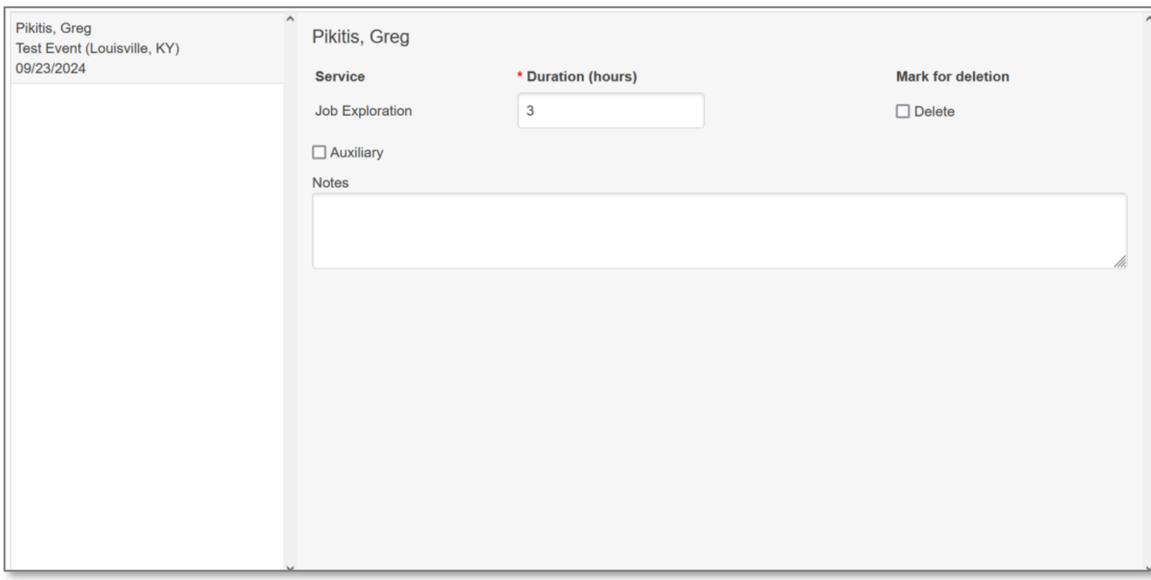
a. You can search the services to help find what you are looking for.


Edit/Delete Services

Search:

| Student Name | School | Service Date | Project, Program, or Event | Auxiliary | Services | Notes |
|---|---|---|---|---|---|---|
| ☐ Pikitis, Greg | LaRue County High School | 09/23/2024 | Test Event (Louisville, KY) | | Job Exploration | |
| ☐ Clampett, Elly May | Leslie County High School | 09/23/2024 | Test Event (Louisville, KY) | | Job Exploration,Self Advocacy,Workplace Readiness | |
| ☐ Liotta, Ray | Larry A. Ryle High School | 09/23/2024 | Test Event (Louisville, KY) | | Job Exploration,Work-based Learning | |
| ☐ Griswald, Audrey | Larry A. Ryle High School | 09/23/2024 | Test Event (Louisville, KY) | | Job Exploration,Work-based Learning | |
| ☐ Earl, Harley | Larry A. Ryle High School | 09/23/2024 | Test Event (Louisville, KY) | | Job Exploration,Work-based Learning | |

3. Scroll down and you will be able to check the delete box for the service you wish to remove.



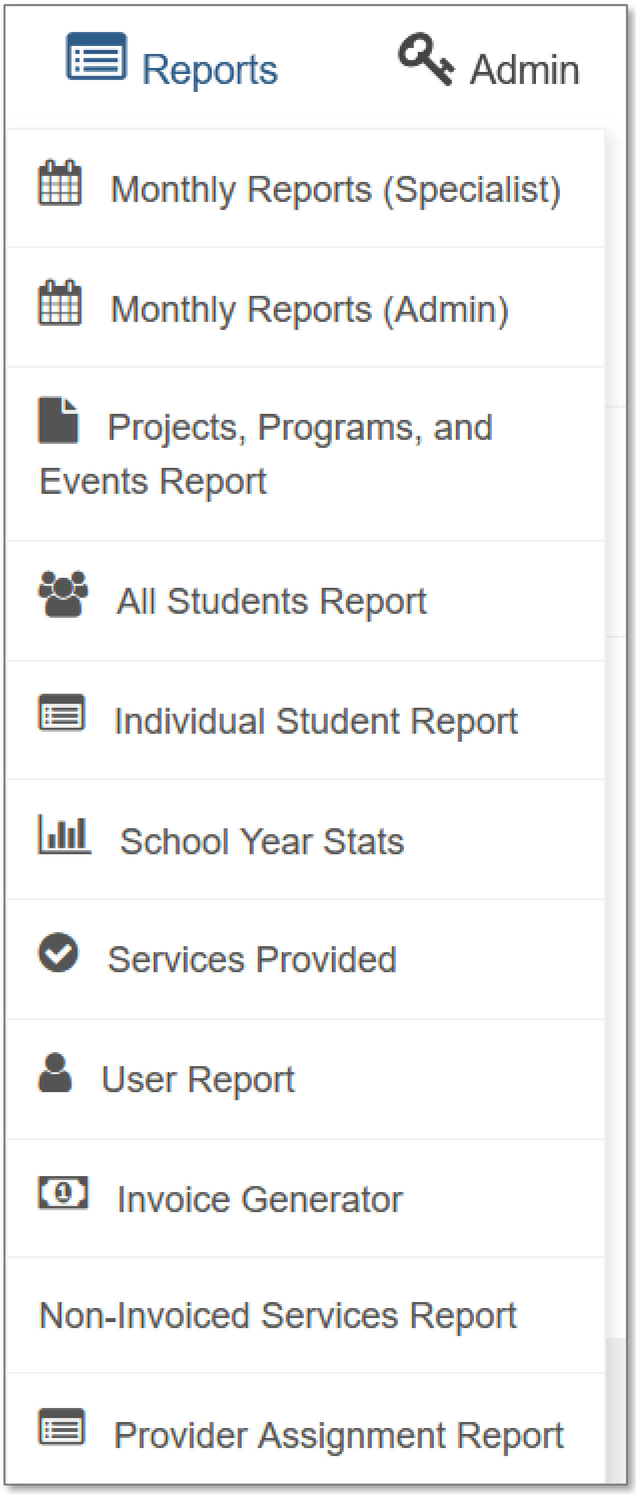

4. Select **"Save Changes"** when done.

   a. A pop up will appear that reads **"Changes saved successfully"**.

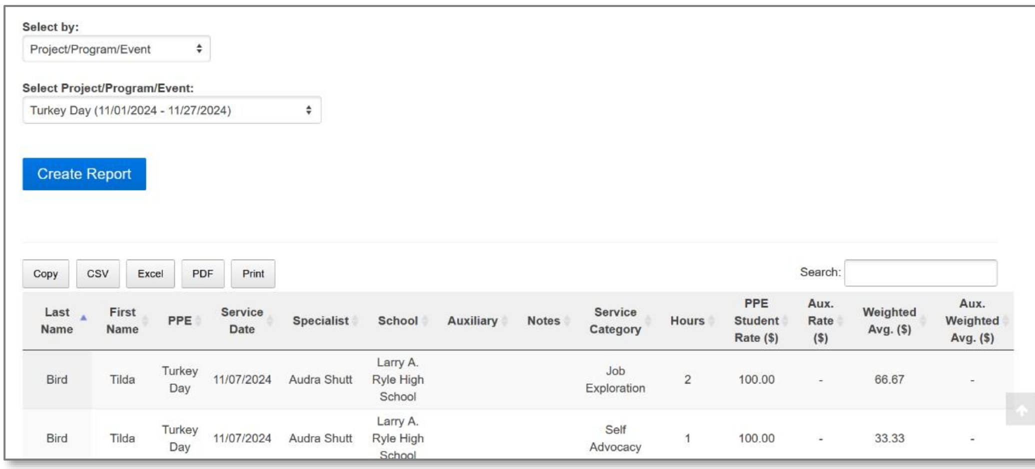
   b. Select **"OK"**.

## Invoice Projects, Programs, and Events

1. Select **Reports>Projects, Programs, and Events Report**



2. Select **"Project/Program/Event"**, from the 2nd drop down.
3. Select **"Create Report"**
4. Click the Excel button to download the report.
    a. This will only show data that you entered.
    b. If you have multiple specialists, the data will need to be combined manually for the invoice.




| Last Name | First Name | PPE | Service Date | Specialist | School | Auxiliary | Notes | Service Category | Hours | PPE Student Rate ($) | Aux. Rate ($) | Weighted Avg. ($) | Aux. Weighted Avg. ($) |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Bird | Tilda | Turkey Day | 11/07/2024 | Audra Shutt | Larry A. Ryle High School | | | Job Exploration | 2 | 100.00 | - | 66.67 | - |
| Bird | Tilda | Turkey Day | 11/07/2024 | Audra Shutt | Larry A. Ryle High School | | | Self Advocacy | 1 | 100.00 | - | 33.33 | - |