

Transition Services File Directions 2025-2026

File Name Rules

Master File Name:
Transition Services_2025-2026
Once downloaded, delete the school year and underscore to shorten the file name to Transition.
Renaming File for Each Student:
Copy the file to each student's electronic folder.
Rename the file using the following master rule: 6digitOVRCase#districtnamefilename.
County district example: 356789KentuckyCoTransition
County district sans "county" example: 356789KentuckyTransition
Independent district example: 356789KentuckyIndTransition
Do not include school year in file name.
Do not include student name or student initials in file name.

Student Info Tab

Student Information Entry:
Complete ALL cells: Student First Name, Student Middle Name, Student Last Name, Student Preferred Name, SSID Number (State Student Identification Number used by school districts in the Infinite Campus student information system), OVR Case Number (6-digit number included on OVR authorization forms. Can also be requested from the VR Counselor), School Name, District Name, Employment Specialist First Name, Employment Specialist Last Name, OVR Counselor First Name, and OVR Counselor Last Name.
Complete ALL cells: Primary Phone (xxx-xxx-xxxx) and Primary Phone Note (clarifying information about phone #); Alternate/Secondary Phone (xxx-xxx-xxxx) and Phone Note (clarifying information about phone #).
Complete ALL Cells: Primary Address to include as applicable House/PO#, Street, Apt.(number or NA), City, State (KY is included in the file but may be changed), Zip Code (xxxxx or xxxxx-xxxx); Student Birthdate; and Primary Email.

Service Status Tab

Demographic information populates from Student Info.
Transition Service Provided - Billed - Date - Comment:
The cells in this field are locked. User cannot type into any cell in this section. The Amount Billed and Date will calculate automatically when the CWTP Employment Specialist enters a date into each form or report, prior to submission to the VR Counselor.

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Positive Personal Profile Tab

Employment Specialists may complete the optional Positive Personal Profile (PPP) as a method to gather initial Comprehensive Vocational Assessment information.

Demographic information populates from Student Info.
Enter the seven-digit Authorization #.
Enter information in each cell for: Dreams and Goals; Interests; Talents, Skills, and Knowledge, including Work Related Skills; Values; Positive Personality Traits; Environmental Preferences; Dislikes; Life and Work Experiences; Support System; and Accommodations.
Employment Specialist signs and dates to verify the completion and accuracy of the Positive Personal Profile.

Invoice Tab: Billing for the Positive Personal Profile (PPP)

Click on the Down arrow and use the Drop Down list to select the School Reporting Quarter in which the PPP was completed. Choices are Q1SFY26, Q2SFY26, Q3SFY26, Q4SFY26 or Q1SFY27. After selection the OVR Reporting Quarter cell auto-fills. Note: Q1SFY27 (last quarter in the drop-down list) can only be used for an Employment Follow-up Report completed in the 1st Quarter (July) of the next fiscal year.
Demographic information populates from the Student Info tab.
Transition Service Provided: Click on the Down arrow and use the Drop Down list to select one of the following: Positive Personal Profile & Comprehensive Vocational Assessment; Positive Personal Profile, Family Engagement Interview & Comprehensive Vocational Assessment; Positive Personal Profile only, or Positive Personal Profile & Family Engagement Interview.
Remit: Amount billed auto-fills after selection of the Transition Service Provided.
Employment Specialist signs and dates to verify the completion of the Report(s) and accuracy of the Invoice.

Positive Personal Profile and Invoice Submission to OVR

Save the Positive Personal Profile worksheet to PDF format.
Name file by adding an underscore _ and PPP to the end of the file name.
Example: 356789KentuckyTransition_PPP
Save the Invoice worksheet to PDF format. Name file by adding <u>one of the following</u> file naming rule options:
Submission of the Positive Personal Profile and Comprehensive Vocational Assessment
Add an underscore _ and INVPPPCVA or _INV_PPPCVA or _ INV_PPP_CVA
Example: 356789KentuckyTransition_INVPPPCVA
Example: 356789KentuckyTransition_INV_PPPCVA
Example: 356789KentuckyTransition_INV_PPP_CVA
Submission of the Positive Personal Profile, Family Engagement Interview, and Comprehensive Vocational Assessment
Add an underscore _ and INVPPPFICVA or _INV_PPPFICVA or _ INV_PPP_FEI_CVA
Example: 356789KentuckyTransition_INVPPPFICVA
Example: 356789KentuckyTransition_INV_PPPFICVA
Example: 356789KentuckyTransition_INV_PPP_FEI_CVA
Submission of the Positive Personal Profile only
Add an underscore _ and INVPPP or _INV_PPP
Example: 356789KentuckyTransition_INVPPP
Example: 356789KentuckyTransition_INV_PPP

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Submission of the Positive Personal Profile & Family Engagement Interview

Add an underscore _ and INVPPPFEI or _INV_PPPFEI or _INV_PPP_FEI
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Example: 356789KentuckyTransition_INVPPPFEI

Example: 356789KentuckyTransition_INV_PPPFEI
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Example: 356789KentuckyTransition_INV_PPP_FEI

Submit the PDF files to OVR by email or VR Counselor access to a shared drive.
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Due Date: When authorized together, the PPP, FEI, CVA Report and Invoice are submitted to OVR <u>upon completion of the CVA</u> and within the quarter authorized. The CVA Report must be submitted within 45 school days of authorization. Some VR Counselors may authorize the services individually and prefer separate submissions.

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Family Engagement Interview

Employment Specialists may complete the optional Family Engagement Interview (FEI) as a method to gather initial Comprehensive Vocational Assessment information.

Demographic information populates from Student Info.
Enter the seven-digit Authorization #.
Enter information for the questions selected during the interview with the family for: Section 1: Hopes, Dreams, Expectations and Challenges; Section 2: School and Adult Supports; Section 3: Focusing on Employment, and Section 4: Other question/information needed to complete the Comprehensive Vocational Assessment. For Section 4 add questions and answers in the two additional text boxes, as needed.
Employment Specialist signs and dates to verify the completion and accuracy of the Family Engagement Interview.

Invoice Tab: Billing for the Family Engagement Interview (FEI)

Click on the Down arrow and use the Drop Down list to select the School Reporting Quarter in which the FEI was completed. Choices include Q1SFY26, Q2SFY26, Q3SFY26, Q4SFY26 and Q1SFY27. After selection the OVR Reporting Quarter auto-fills. Note: Q1SFY27 (last quarter in the drop-down list) can only be used for an Employment Follow-up Report completed in the 1st Quarter (July) of the next fiscal year.
Demographic Information populates from the Student Info tab.
Transition Service Provided - Click on the Down arrow and use the Drop Down list to select one of the following choices: Family Engagement Interview & Comprehensive Vocational Assessment, Positive Personal Profile, Family Engagement Interview & Comprehensive Vocational Assessment, Family Engagement Interview Only, or Positive Personal Profile & Family Engagement Interview.
Remit: Amount billed auto-fills after selection of the Transition Service Provided.
Employment Specialist signs and dates to verify the completion of the FEI and accuracy of the Invoice.

Family Engagement Interview and Invoice Submission to OVR

Save the Family Engagement Interview worksheet to PDF format.
Name the file by adding an underscore _ and FEI to the end of the file name.
Example: 356789KentuckyTransition_FEI
Save the Invoice worksheet to PDF format. Name the file by adding one of the following file naming rule options:
For submission of the Family Engagement Interview and Comprehensive Vocational Assessment
Add an underscore _ and INVFEICVA or _INV_FEICVA or _INV_FEI_CVA
Example: 356789KentuckyTransition_INVFEICVA
Example: 356789KentuckyTransition_INV_FEICVA
Example: 356789KentuckyTransition_INV_FEI_CVA
For submission of the Positive Personal Profile, Family Engagement Interview, and Comprehensive Vocational Assessment
Add an underscore _ and INVPPFEICVA or INV_PPPFEICVA or _INV_PPP_FEI_CVA
Example: 356789KentuckyTransition_INVPPFEICVA
Example: 356789KentuckyTransition_INV_PPPFEICVA
Example: 356789KentuckyTransition_INV_PPP_FEI_CVA
Submission of the Family Engagement Interview only
Add an underscore _ and INVFEI or _INV_FEI
Example: 356789KentuckyTransition_INVFEI
Example: 356789KentuckyTransition_INV_FEI

Transition Services File Directions

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Submission of the Positive Personal Profile & Family Engagement Interview
Add an underscore _ and INVPPPFEI or _INV_PPPFEI or _INV_PPP_FEI
Example: 356789KentuckyTransition_INVPPPFEI
Example: 356789KentuckyTransition_INV_PPPFEI
Example: 356789KentuckyTransition_INV_PPP_FEI
Submit PDF files to OVR by email or VR Counselor access to shared drive.
Due Date: When authorized together, the PPP, FEI, CVA and Invoice are submitted to OVR upon completion of the CVA and within the quarter authorized. The CVA Report must be submitted within 45 school days of authorization. Some VR Counselors may authorize the services individually and prefer separate submissions.

Transition Services File Directions
2025-2026

CVA Student Activity Report 1

Employment Specialists conduct activities at work or employment sites in the community as part of the completion of the Comprehensive Vocational Assessment. 10 hours minimum required, up to 20 hours allowable.

Demographic information populates from Student Info.
Enter the seven-digit CVA Authorization #.
Total Time calculates by formula from the Total Time for Activities column.
Total Amount calculates by formula from the Total Time cell.
Enter Date of activity. Format: m/dd/yyyy
Begin Time & End Time: Enter the beginning and ending time of activity. Indicate AM or PM (mandatory). Example 10:00 AM or 2:00 PM. There must be a space between the time and AM or PM. If not, the formula in the Total Time for Activities column will not work. Correct 10:00 AM. Incorrect 10:00AM.
Total time of Activity (rounded to the nearest .25): The total duration of the activity will calculate by formula, rounding to the nearest 15 minute increment (i.e., .25, .50, .75, 1.00) The numbers in these cells link to the Total Time for Activities section of the report.
CVA Area Assessed: Click the Down Arrow and use the Drop Down box to select the primary area of focus of the assessment activity conducted. Primary assessment areas include: -Effects of Health or Medical Conditions and medications(s) on the student (Health/Medical Conditions) -Student's ability to use basic and high level math operations (Math) -Student's ability with concepts of time (Time) -How well the student applies money skills (Money Skills) -How well the student reads (Reading) -The student behaviors in familiar work environments (Familiar Environment) -How well the student behaves in unfamiliar work environments (Unfamiliar Environment) -Communication -Social skills in relation to how well the student interacts with others (Social Skills) -Team Work -Problem Solving Skills (Problem Solving)
Specific work or employment site: enter the name of the business or employer in the community where the activity was conducted.
Specific activity conducted at the work or employment site: enter a description of the activity provided.
Notes from the Assessment Activity: enter a description of the skills and behaviors observed during the assessment activity, as related to the targeted CVA area.
Employment Specialist signs and dates to verify the completion of the assessment activities and accuracy of the CVA Student Activity Report.

Invoice Tab: Billing for CVA Student Activity Report 1

Click on the Down arrow and use the Drop Down list to select the School Reporting Quarter in which the CVA student activities were conducted. Choices include Q1SFY26, Q2SFY26, Q3SFY26, Q4SFY26 and Q1SFY27. After selection the OVR Reporting Quarter auto-fills. Note: Q1SFY27 (last quarter in the drop-down list) can only be used for an Employment Follow-up Report completed in the 1st Quarter (July) of the next fiscal year.
Demographic information populates from the Student Info tab.
Transition Service Provided: Click on the Down arrow and use the Drop Down list to select CVA Student Activity Report 1.
Remit: Amount billed auto-fills after selection of the Transition Service Provided.
Employment Specialist signs and dates to verify the completion of the CVA student activities and accuracy of the corresponding report and Invoice.

Transition Services File Directions

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CVA Student Activity Report 1 and Invoice Submission to OVR

Save the CVA Student Activity Report 1 worksheet to PDF format. Name file by adding an underscore _ and CVASAR1 to the end of the file name.

Example: 356789KentuckyTransition_CVASAR1

Save the Invoice worksheet to PDF format. Name file by adding an underscore _ and INVCVASAR1 or _INV_CVASAR1 to the end of the file name.

Example: 356789KentuckyTransition_INVCVASAR1

Example: 356789KentuckyTransition_INV_CVASAR1

Submit PDF files to OVR by email or VR Counselor access to shared drive.

Due Date: The CVA Student Activity Report 1 and Invoice are submitted to OVR by the fifth of the month following service provision and within the quarter authorized.

CVA Student Activity Report 2

Employment Specialists conduct activities at work or employment sites in the community as part of the completion of the Comprehensive Vocational Assessment. 10 hours minimum required, up to 20 hours allowable. Complete CVA Student Activity Report 2, as needed.

Demographic information populates from Student Info.

Enter the seven-digit Authorization #.

Total Time calculates by formula from the Total Time for Activities column.

Total Amount calculates by formula from the Total Time cell.

Enter Date of activity. Format: m/dd/yyyy

Begin Time & End Time: Enter the beginning and ending time of activity. Indicate AM or PM (mandatory). Example 10:00 AM or 2:00 PM. There must be a space between the time and AM or PM. If not, the formula in the Total Time for Activities column will not work. Correct: 10:00 AM. Incorrect: 10:00AM.

Total time of Activity (rounded to the nearest .25): The total duration of the activity will calculate by formula, rounding to the nearest 15 minute increment (i.e., .25, .50, .75, 1.00) The numbers in these cells link to the Total Time for Activities section of the report.

CVA Area Assessed: Click the Down Arrow and use the Drop Down box to select the primary area of focus of the assessment activity conducted.

Primary assessment areas include:

- Effects of Health or Medical Conditions and medications(s) on the student (Health/Medical Conditions)
- Student's ability to use basic and high level math operations (Math)
- Student's ability with concepts of time (Time)
- How well the student applies money skills (Money Skills)
- How well the student reads (Reading)
- The student behaviors in familiar work environments (Familiar Environment)
- How well the student behaves in unfamiliar work environments (Unfamiliar Environment)
- Communication
- Social skills in relation to how well the student interacts with others (Social Skills)
- Team Work
- Problem Solving Skills (Problem Solving)

Specific work or employment site: enter the name of the business or employer in the community where the activity was conducted.

Specific activity conducted at the work or employment site: enter a description of the activity provided.

Notes from the Assessment Activity: enter a description of the skills and behaviors observed during the assessment activity, as related to the targeted CVA area.

Employment Specialist signs and dates to verify the completion of the assessment activities and accuracy of the CVA Student Activity Report.

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Invoice Tab: Billing for CVA Student Activity Report 2

Click on the Down arrow and use the Drop Down list to select the School Reporting Quarter in which the CVA student activities were conducted. Choices include Q1SFY26, Q2SFY26, Q3SFY26, Q4SFY26 and Q1SFY27. After selection the OVR Reporting Quarter auto-fills. **Note:** Q1SFY27 (last quarter in the drop-down list) can only be used for an Employment Follow-up Report completed in the 1st Quarter (July) of the next fiscal year.

Demographic information populates from the Student Info tab.

Transition Service Provided: Click on the Down arrow and use the Drop Down list to select CVA Student Activity Report 2.

Remit: Amount billed auto-fills after selection of the Transition Service Provided.

Employment Specialist signs and dates to verify the completion of the CVA student activities and accuracy of the corresponding report and Invoice.

CVA Student Activity Report 2 and Invoice Submission to OVR

Save the CVA Student Activity Report 2 worksheet to PDF format. Name file by adding an underscore _ and CVASAR2 to the end of the file name.

Example: 356789KentuckyTransition_CVASAR2

Save the Invoice worksheet to PDF format. Name file by adding an underscore _ and INVCVASAR2 or _INV_CVASAR2 to the end of the file name.

Example: 356789KentuckyTransition_INVCVASAR2

Example: 356789KentuckyTransition_INV_CVASAR2

Submit PDF files to OVR by email or VR Counselor access to shared drive.

Due Date: The CVA Student Activity Report 2 and Invoice are submitted to OVR by the fifth of the month following the completion of services and within the quarter authorized.

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CVA Student Activity Report 3

Employment Specialists conduct activities at work or employment sites in the community as part of the completion of the Comprehensive Vocational Assessment. 10 hours minimum required, up to 20 hours allowable. Complete CVA Student Activity Report 2, as needed.

Demographic information populates from Student Info.
Enter the seven-digit Authorization #.
Total Time calculates by formula from the Total Time for Activities column.
Total Amount calculates by formula from the Total Time cell.
Enter Date of activity. Format: m/dd/yyyy
Begin Time & End Time: Enter the beginning and ending time of activity. Indicate AM or PM (mandatory). Example 10:00 AM or 2:00 PM. There must be a space between the time and AM or PM. If not, the formula in the Total Time for Activities column will not work. Correct: 10:00 AM. Incorrect: 10:00AM.
Total time of Activity (rounded to the nearest .25): The total duration of the activity will calculate by formula, rounding to the nearest 15 minute increment (i.e., .25, .50, .75, 1.00) The numbers in these cells link to the Total Time for Activities section of the report.
<p>CVA Area Assessed: Click the Down Arrow and use the Drop Down box to select the primary area of focus of the assessment activity conducted.</p> <p>Primary assessment areas include:</p> <ul style="list-style-type: none"> -Effects of Health or Medical Conditions and medications(s) on the student (Health/Medical Conditions) -Student's ability to use basic and high level math operations (Math) -Student's ability with concepts of time (Time) -How well the student applies money skills (Money Skills) -How well the student reads (Reading) -The student behaviors in familiar work environments (Familiar Environment) -How well the student behaves in unfamiliar work environments (Unfamiliar Environment) -Communication -Social skills in relation to how well the student interacts with others (Social Skills) -Team Work -Problem Solving Skills (Problem Solving)
Specific work or employment site: enter the name of the business or employer in the community where the activity was conducted.
Specific activity conducted at the work or employment site: enter a description of the activity provided.
Notes from the Assessment Activity: enter a description of the skills and behaviors observed during the assessment activity, as related to the targeted CVA area.
Employment Specialist signs and dates to verify the completion of the assessment activities and accuracy of the CVA Student Activity Report.

Invoice Tab: Billing for CVA Student Activity Report 3

Click on the Down arrow and use the Drop Down list to select the School Reporting Quarter in which the CVA student activities were conducted. Choices include Q1SFY26, Q2SFY26, Q3SFY26, Q4SFY26 and Q1SFY27. After selection the OVR Reporting Quarter auto-fills. Note: Q1SFY27 (last quarter in the drop-down list) can only be used for an Employment Follow-up Report completed in the 1st Quarter (July) of the next fiscal year.
Demographic information populates from the Student Info tab.
Transition Service Provided: Click on the Down arrow and use the Drop Down list to select CVA Student Activity Report 3.
Remit: Amount billed auto-fills after selection of the Transition Service Provided.
Employment Specialist signs and dates to verify the completion of the CVA student activities and accuracy of the corresponding report and Invoice.

Transition Services File Directions

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CVA Student Activity Report 3 and Invoice Submission to OVR

Save the CVA Student Activity Report 2 worksheet to PDF format. Name file by adding an underscore _ and CVASAR23 to the end of the file name.

Example: 356789KentuckyTransition_CVASAR3

Save the Invoice worksheet to PDF format. Name file by adding an underscore _ and INVCVASAR3 or _INV_CVASAR3 to the end of the file name.

Example: 356789KentuckyTransition_INVCVASAR3

Example: 356789KentuckyTransition_INV_CVASAR3

Submit PDF files to OVR by email or VR Counselor access to shared drive.

Due Date: The CVA Student Activity Report 3 and Invoice are submitted to OVR by the fifth of the month following the completion of services and within the quarter authorized.

Transition Services File Directions

2025-2026

Vocational Assessment Tab (Comprehensive Vocational Assessment)

Demographic information populates from Student Info.

Enter the CVA Authorization #.

Enter the Anticipated Date of HS Exit.

Use Drop Down list to select Type of Diploma Anticipated. Choices are Regular Diploma or Alternative High School Diploma.

Enter information for: Individual Education Program; Individual Learning Plan; Previous Work Experience(s); Current Activities, Life Situation, Network of Family and Friends, and Important History (#1-8); Geographical Boundaries; Transportation Goal Post-High School, Actions to Achieve, Backup-Plan; General Knowledge (#1-6); Work Behavior (#1-5); and Communication (Primary Language/Mode of Communication.

Click on the Down Arrow and use Drop Down list to select Independent (I), With Assistance (WA) or Area of Concern (AC) for how the student communicates at work or employment settings.

For any Area of Concern add mandatory specifics or comments. For any skill performed With Assistance, specifics or comment are recommended but not required.

Enter information for Social Skills/Interaction and Needed supports for deficit social skills.

Click on the Down Arrow and use Drop Down list to select Independent (I), With Assistance (WA) or Area of Concern (AC) for: Teamwork; Work Skills Observations; Appearance/hygiene; Problem solving skills; Acceptance of supervision; Attention to task/Persistence; Initiative/Motivation; Awareness of safety precautions; Respect of and ability to care for equipment/property; Adapting to Change; Ability to maintain adequate productivity/pace; and Attendance/Punctuality.

For any Area of Concern add mandatory specifics or comments. For any skill performed With Assistance, specifics or comment are recommended but not required.

Enter information for: Intensity of Supports Needed and Work Environment/Schedule.

Enter information on the Summary and Recommendation page for the Recommended Vocational Goal for the IPE; describe the students abilities and job related skills an employer will view as an asset/value; recommended work environment; post-high school transportation goal and plan; summary of supports needed to achieve competitive integrated employment; and employers to pursue aligned with the recommended vocational goal.

Employment Specialist signs and dates to verify the completion and accuracy of the Comprehensive Vocational Assessment.

Invoice Tab: Billing for the Comprehensive Vocational Assessment

Click on the Down arrow and use the Drop Down list to select the School Reporting Quarter in which the CVA was completed. Choices include Q1SFY26, Q2SFY26, Q3SFY26, Q4SFY26 and Q1SFY27. After selection the OVR Reporting Quarter auto-fills. **Note:** Q1SFY27 (last quarter in the drop-down list) can only be used for an Employment Follow-up Report completed in the 1st Quarter (July) of the next fiscal year.

Demographic information populates from the Student Info tab.

Transition Service Provided - Click on the Down arrow and use the Drop Down list to select one of the following choices: Positive Personal Profile & Comprehensive Vocational Assessment, Family Engagement Interview & Comprehensive Vocational Assessment, Positive Personal Profile, Family Engagement Interview & Comprehensive Vocational Assessment, or Comprehensive Vocational Assessment Only.

Remit: Amount billed auto-fills after selection of the Transition Service Provided.

Employment Specialist signs and dates to verify the completion of the CVA and accuracy of the CVA Invoice.

Comprehensive Vocational Assessment Only and Invoice Submission to OVR

Save the Vocational Assessment worksheet to PDF format. Name file by adding an underscore _ and CVA to the end of the file name.

Example: 356789KentuckyTransition_CVA

Save the Invoice worksheet to PDF format. Name file by adding an underscore _ and INVCVA or INV_CVA to the end of the file name.

Example: 356789KentuckyTransition_INVCVA

Transition Services File Directions
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Example: 356789KentuckyTransition_INV_CVA

Submit PDF files to OVR by email or VR Counselor access to shared drive.

Due Date: The CVA Report and Invoice are due to OVR upon completion and within 45 school days of authorization.

For submission of the Positive Personal Profile and Comprehensive Vocational Assessment: See directions on page 2.

For submission of the Family Engagement Interview and Comprehensive Vocational Assessment: See directions on page 4.

For submission of the Positive Personal Profile, Family Engagement Interview, and Comprehensive Vocational Assessment: See directions on page 2 or page 4.

Transition Services File Directions

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JD_JC Planning Meeting Tab (Job Development/Job Coaching Planning Meeting)

Demographic information populates from Student Info.

Enter the seven-digit Authorization #.

Enter the initial Job Development activities that will support the Individual Plan for Employment vocational goal; Potential employers & contacts for Job Development and Job Coaching; and Concerns about providing services and steps to address the concerns.

Enter names of Attendees. Note: Student, Employment Specialist, OVR Counselor must attend in order to bill OVR for meeting. Include names of other attendee(s), if any.

Employment Specialist signs and dates to verify the completion of the Job Development/Job Coaching Meeting and accuracy of the content within the form.

Invoice Tab: Billing for JD/JC Planning Meeting Report

Click on the Down arrow and use the Drop Down list to select the School Reporting Quarter in which the Job Development/Job Coaching Meeting was held. Choices include Q1SFY26, Q2SFY26, Q3SFY26, Q4SFY26 and Q1SFY27. After selection the OVR Reporting Quarter auto-fills. **Note:** Q1SFY27 (last quarter in the drop-down list) can only be used for an Employment Follow-up Report completed in the 1st Quarter (July) of the next fiscal year.

Demographic information populates from the Student Info tab.

Transition Service Provided: Click on the Down arrow and use the Drop Down list to select Job Development/Job Coaching Planning Meeting.

Remit: Amount billed auto-fills after selection of the Transition Service Provided.

Employment Specialist signs and dates to verify the completion of the JD/JC Planning Meeting and accuracy of the corresponding report and Invoice.

Job Development/Job Coaching Planning Meeting Report and Invoice Submission to OVR

Save the JD_JC Planning Meeting worksheet to PDF format. Name file by adding an underscore _ and JDJCPM to the end of the file name.

Example: 356789KentuckyTransition_JDJCPM

Save the Invoice worksheet to PDF format. Name file by adding an underscore _ and INVJDJCPM or _INV_JDJCPM to the end of the file name.

Example: 356789KentuckyTransition_INVJDJCPM

Example: 356789KentuckyTransition_INV_JDJCPM

Submit PDF files to OVR by email or VR Counselor access to shared drive.

Due Date: The Job Development/Job Coaching Planning Meeting Report and Invoice are submitted to OVR upon completion and within the quarter authorized.

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Supported Employment Meeting Tab

Demographic information populates from Student Info.
Vocational Goal from the Individual Plan for Employment populates from the JD_JC Planning Meeting.
Enter the VR Counselor expectations in relation to Supported Employment; steps to be completed until the end of the school year; the plan for collaboration between the CWTP Employment Specialist and Community Rehabilitation Provider; and supports the student needs for transfer/transition from the CWTP Employment Specialist and the Community Rehabilitation Provider.
Enter names of Attendees. Note: Student, Employment Specialist, OVR Counselor and Community Rehabilitation Provider must attend in order to bill OVR for meeting. Include names of other attendee(s), if any.
Employment Specialist signs and dates to verify the Supported Employment Meeting occurred and accuracy of the content within the form.

Invoice Tab: Billing for Supported Employment Meeting Report

Click on the Down arrow and use the Drop Down list to select the School Reporting Quarter in which the Support Employment Meeting was held. Choices include Q1SFY26, Q2SFY26, Q3SFY26, Q4SFY26 and Q1SFY27. After selection the OVR Reporting Quarter auto-fills. Note: Q1SFY27 (last quarter in the drop-down list) can only be used for an Employment Follow-up Report completed in the 1st Quarter (July) of the next fiscal year.
Demographic information populates from the Student Info tab.
Transition Service Provided: Click on the Down arrow and use the Drop Down list to select Supported Employment Meeting.
Remit: Amount billed auto-fills after selection of the Transition Service Provided.
Employment Specialist signs and dates to verify the completion of the Supported Employment Meeting and accuracy of the corresponding report and Invoice.

Supported Employment Meeting Report and Invoice Submission to OVR

Save the Supported Employment Meeting worksheet to PDF format. Name file by adding an underscore _ and SEM to the end of the file name.
Example: 356789KentuckyTransition_SEM
Save the Invoice worksheet to PDF format. Name file by adding an underscore _ and INVSEM or _INV_SEM to the end of the file name.
Example: 356789KentuckyTransition_INVSEM
Example: 356789KentuckyTransition_INV SEM
Submit PDF files to OVR by email or VR Counselor access to shared drive.
Due Date: The Supported Employment Meeting Report and Invoice are submitted to OVR upon completion and within the quarter authorized.

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Exit Planning Meeting Tab

Demographic information populates from the Student Info tab.
Enter the seven-digit Authorization #.
Anticipated Date of High School Exit: Enter anticipated date (due to graduation, dropping out or aging out). The exact date may not be known at this point in time.
Student's Post High School Contact Information: Information in this section populates from the Student Info tab.
Two Alternative Contacts: Enter the name, phone number and phone note (clarifying information about phone #) for two additional contacts that have telephones and can be reached post-high school.
Enter the Vocational Goal from the Individual Plan for Employment.
IPE Goal Status: Click on the Down Arrow and use Drop Down list to select whether the Individual Plan for Employment (IPE) Goal is Unchanged or Amended.
Current Job Site: Enter the full name of the student's current job site.
#Hours per Week: Enter the number of hours per week the student works at the current job site.
Enter the steps the CWTP Employment Specialist will take until the end of the year to assist the student's transition to competitive integrated employment.
Enter the description the Employment Follow-up action plan.
Adult Service Providers: Enter other adult service providers needed by the student if any.
Enter the names of Attendees. Note: Student, Employment Specialist, and OVR Counselor must attend in order to bill OVR for meeting. Include names of other attendee(s), if any.
Employment Specialist signs and dates to verify the completion of the Exit Planning Meeting and the accuracy of the content within the form.

Invoice Tab: Billing for Exit Planning Meeting

Planning Meeting was held. Choices include Q1SFY26, Q2SFY26, Q3SFY26, Q4SFY26 and Q1SFY27. After selection the OVR Reporting Quarter auto-fills. Note: Q1SFY27 (last quarter in the drop-down list) can only be used for an Employment Follow-up Report completed in the 1st Quarter (July) of the next fiscal year.
Demographic information populates from the Student Info tab.
Transition Service Provided: Click on the Down arrow and use the Drop Down list to select Exit Planning Meeting.
Remit: Amount billed auto-fills after selection of the Transition Service Provided.
Employment Specialist signs and dates to verify the completion of the Exit Planning Meeting, corresponding form, and accuracy of the Invoice.

Exit Planning Meeting and Invoice Submission to OVR

Save the Exit Planning Meeting worksheet to PDF format. Name file by adding an underscore _ and EPM to the end of the file name.
Example: 356789KentuckyTransition_EPM
Save the Invoice worksheet to PDF format. Name file by adding an underscore _ and INVEPM or INV_EPM to the end of the file name.
Example: 356789KentuckyTransition_INVEPM
Example: 356789KentuckyTransition_INV_EPM
Submit PDF files to OVR by email or VR Counselor access to shared drive.
Due Date: The Exit Planning Meeting and Invoice are submitted to OVR upon completion and within the quarter authorized.

Transition Services File Directions 2025-2026

Job Placement Report Tab

A student receiving CWTP Transition Services may attain Job Placement at any time. However, the Job Placement Report is not submitted until the day after high school exit.

Demographic information populates from the Student Info tab.	
Enter the seven-digit Authorization #.	
The Vocational Goal from the Individual Plan for Employment populates from the Exit Planning Meeting Report.	
Enter in each cell:	Name of Employer, Address, Phone, and Supervisor Name and Position
	Date Hired (must be prior to high school exit date)
	Date of High School Exit
	OVR Job Placement Date (cannot be before student's exit date)
	Job Classification/Title, Current Job Duties, and What the Student likes about the job
Click on the Down Arrow and use Drop Down list to select Yes or No: Are natural supports in place? If Yes, click or tab to the next cell to describe the Natural Support(s).	
Enter Hourly Wage and Hours per Week.	
Click on the Down Arrow and use Drop Down list to select Yes or No for Health Insurance.	
Enter Progress Notes and Description of Concerns to address during Employment Follow-up Services.	
Employment Specialist signs and dates to verify Job Placement (student attained competitive integrated employment aligned with the vocational goal in the Individualized Plan for Employment) and accuracy of the contents within the Job Placement Report.	

Invoice Tab: Billing for Job Placement

Click on the Down arrow and use the Drop Down list to select the School Reporting Quarter in which the Job Placement Report was completed. Choices include Q1SFY26 Q2SFY26, Q3SFY26, Q4SFY26 and Q1SFY27. After selection the OVR Reporting Quarter auto-fills. Note: Q1SFY27 (last quarter in the drop-down list) can only be used for an Employment Follow-up Report completed in the 1st Quarter (July) of the next fiscal year.
Demographic information populates from the Student Info tab.
Transition Service Provided: Click on the Down arrow and use the Drop Down list to select Job Placement Report.
Remit: Amount billed auto-fills after selection of the Transition Service Provided.
Employment Specialist signs and dates to verify Job Placement and the accuracy of the corresponding report and Invoice.

Job Placement Report and Invoice Submission to OVR

Save the Job Placement Report worksheet to PDF format. Name the file by adding an underscore _ and JPR to the end of the file name.
Example: 356789KentuckyTransition_JPR
Save the Invoice worksheet to PDF format. Name the file by adding an underscore _ and INVJPR or INV_JPR to the end of the file name.
Example: 356789KentuckyTransition_INVJPR
Example: 356789KentuckyTransition_INV_JPR
Submit the PDF files to OVR by email or VR Counselor access to shared drive.
Due Date: The Job Placement Report and Invoice are submitted the day after a student exits high school with competitive integrated employment. The employment must be attained at least one day before high school exit and aligned with the vocational goal in the Individualized Plan for Employment.

Transition Services File Directions 2025-2026

Employment Follow-up Report@30 Tab

Demographic Data Information populates from Student Info tab.
Enter the seven-digit Authorization #.
Vocational Goal from the Individual Plan for Employment populates from the Job Placement Report.
Name of Employer populates from the Job Placement Report.
Job Classification/Title populates from the Job Placement Report.
Job Duties populates from the Job Placement Report.
Date Hired populates from the Job Placement Report.
High School Exit Date populates from the Job Placement Report.
OVR Employed Status Date populates from the Job Placement Report.
Date Employment Specialist Follow-up Services End calculates from the OVR Employed Status Date in Job Placement Report.
Hourly wage populates from the Job Placement Report.
Hours per Week populates from the Job Placement Report.
Health Insurance populates from the Job Placement Report.
Enter Transportation Information and Current Schedule.
Current Supervisor populates from the Job Placement Report.
Employer Phone populates from the Job Placement Report.
Click on the Down Arrow and use Drop Down list to select Yes or No for Student Satisfaction with Current Job, status of Natural Supports, and Expectation Student will Continue to be Successful in Position.
Employment Specialist signs and dates to verify the completion of the 30 days Employment Follow-up services and accuracy of the content within the Employment Follow-up Report.

Invoice Tab: Billing Employment Follow-up Report

Click on the Down arrow and use the Drop Down list to select the School Reporting Quarter in which the Employment Follow-up was completed. Choices include Q1SFY26, Q2SFY26, Q3SFY26, Q4SFY26 and Q1SFY27. After selection the OVR Reporting Quarter auto-fills. Note: Q1SFY27 (last quarter in the drop-down list) can only be used for an Employment Follow-up Report completed in the 1st Quarter (July) of the next fiscal year.
Demographic information populates from the Student Info tab.
Transition Service Provided: Click on the Down arrow and use the Drop Down list to select Employment Follow-up Report.
Remit: Amount billed auto-fills after selection of the Transition Service Provided.
Employment Specialist signs and dates to verify the completion of the 30 days of Employment Follow-up services and the Employment Follow-up Report and Invoice.

Employment Follow-up Report and Invoice Submission to OVR

Save the Employment Follow-up Report worksheet to PDF format. Name the file by adding an underscore _ and EFR to the end of the file name.
Example: 356789KentuckyTransition_EFR
Save the Invoice worksheet to PDF format. Name the file by adding an underscore _ and INVEFR or INV_EFR to the end of the file name.
Example: 356789KentuckyTransition_INVEFR
Example: 356789KentuckyTransition_INV_EFR

Transition Services File Directions
2025-2026

Submit PDF files to OVR by email or VR Counselor access to shared drive.

Due Date: The 30 days of employment follow-up begin after the student exits high school, based on the OVR Employed Status Date. The 30 days of employment follow-up typically ends in June. In this case, the Employment Follow-up Report and Invoice are due upon completion and no later than July 5. The follow-up services could end in July of the next fiscal year, again dependent on the OVR Employed Status Date, which must be after the student exits high school. In this case the Employment Follow-up Report and Invoice are submitted upon completion, and no later than August 5.

For additional assistance contact Jill Griffiths

Office: 304.523.7900

Cell: 304.633.7161

Email: jill.griffiths@uky.edu