

**Job Coaching Report Directions
2026-2027**

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File Name Rules

1. Master File Name: Job Coaching Report_2026-2027
2. Once downloaded retain a blank copy of the file.
3. Rename the file to JCReport and delete the school year in the title.

Rename File for Each Student

1. Copy the file to each student's electronic folder
2. Rename the file using the following master rule: **6digitOVRCase#districtnameJCReport**.
County district example: 356789KentuckyCountyJCReport
County district sans "county" example: 356789KentuckyJCReport
Independent district example: 356789KentuckyIndJCReport
3. Do not include school year in file name. See Step 3 in File Name Rules above.
4. Do not include student name or student initials in file name.

Student Info Tab

1. Student Demographic Data 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 is included on OVR authorization forms. If unknown request from the VR Counselor), School Name, District Name, Employment Specialist First Name, Employment Specialist Last Name, OVR Counselor First Name, OVR Counselor Last Name, current IPE Goal, and Name of Employer.

2. Sum of Hours and Amount Billed section

The cells in this field are locked. User cannot type into this section. The Hours will calculate from the *Total Time for Activities this Month* cell in each monthly report. The *Amount Billed* will calculate by formula. **Note:** Up to 30 hours per quarter are billable. If a month or quarter is over 30 hours conditional formatting will appear in the "hours" cell (red letters/pink background). If more than 30 hours per quarter are needed for a student contact the VR Counselor. The VR Counselor determines if additional hours needed.

JC Monthly Report Tabs - August through June

1. The demographic data from the *Student Info* tab populates into each monthly report. See the Student Info Tab: Data Entry section for the information that will auto-fill.
2. The *Current IPE Goal* populates from the *Student Info* tab.
3. Enter the seven-digit *Job Coaching Authorization Number* from the OVR Authorization form.
4. The *Name of Employer* populates from the *Student Info* tab.
5. *Total Time for Activities for this Month*: The data calculates by formula from the entries in the *Total Time* column.
6. Enter the *Date* of the Job Coaching activity. Format: m/dd/yyyy

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7. *Start Time* : Enter the ending time of activity. Indicate AM or PM (**mandatory**). Example: 10:00 AM or 3:00 PM. There must be a space between the time and AM or PM. If not, the formula in the *Total Time* column will not work. Correct 10:00 AM. Incorrect 10:00AM.

8. *End Time* : Enter the ending time of activity. Indicate AM or PM (**mandatory**). Example: 10:00 AM or 3:00 PM. There must be a space between the time and AM or PM. If not, the formula in the *Total Time* column will not work. Correct 10:00 AM. Incorrect 10:00AM.

9. *Total Time of Activity* : The total duration of the activity calculates by formula, rounding to the nearest 15-minute increment (i.e., .25, .50, .75, 1.00). The total duration in each cell is added together by formula in the *Total Time for Activities* section of the monthly report.

10. *Job Coaching Area* : Click on the Down Arrow that appears when the cell is active to select the Job Coaching Area. Options in the list include:

- Job task analysis
- Instruction during job performance
- Observation during job performance
- Determination of needed accommodation(s)
- Determination of natural supports and other supports needed
- Facilitation of needed supports

The Job Coaching Area list above is comprehensive, aligns with the definition of Job Coaching, and includes areas needed by a student who has attained employment aligned with the Individual Plan for Employment (IPE) goal. The list is not exhaustive. See the *CWTP Employment Specialist Procedures Manual* for the full description of each option.

If the Employment Specialist provides an activity that does not fit under a Job Coaching Area listed above, type "Other Job Coaching Area" and a description in the *Other Important Information* cell. This would be a rare occurrence. The added Job Coaching Area must relate to assisting the student in maintaining the competitive integrated employment aligned with the student's IPE vocational goal.

11. *Full Name of Site where activity occurred* : Enter the full name of location where the Job Coaching service occurred. Do not use acronyms. The majority of the time this will be the employment site. On occasion an activity may occur in the Employment Specialist office to discuss specific concerns such as hygiene issues or benefits counseling. Examples: Tic Toc Tire, Dollar Tree, Super Curl Beauty Shop, Hart County High School Employment Specialist office, etc.

12. *Describe the training or support activity you provided today. Include the specific role or responsibility from the student's job description that was the focus during the session* : Enter a description of the training or support activity provided during the Job Coaching session. The activity must align with the Job Coaching area listed. Include the role or responsibility from the student's job description targeted during the session.

A training activity includes job task analysis, instruction during job performance, or observation during job performance. A support activity includes the determination of needed accommodations(s), determination of natural supports or other supports needed, or facilitation of needed supports.

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13. During *today's activity*, what did you learn about the student's ability to perform in the employment setting or complete assigned responsibilities? If the activity was training-related (task analysis, instruction, or observation), describe the student's ability to complete the specific task(s), role, or responsibility during the coaching session.

If the coaching session was a support activity (determination or facilitation of accommodations, natural supports, or other supports needed), describe the progress made in identifying and implementing needed supports. When supports are in place, explain their impact on the student's ability to perform the specific task(s), role, or responsibilities outlined in the job description. Also describe the student's ability to advocate for, manage, and maintain the supports independently.

14. *Other Important Information* : Describe new information, **if any**, that may affect the student or the services provided. Examples include but are not limited to change supervisor or co-workers, change in medication, change in behavior, change in residence or living arrangements, or death in the family.

Also see the *Job Coaching Area* directions for additional use of this cell.

15. *List the specific job-related skill(s) the student acquired this month and can apply effectively at work* : Enter a description of the skills the student acquired and independently used during the month.

16. *Growth is needed in the following job-related skills(s) and will be focused on next month* : Enter a description of the skills the student demonstrated with assistance or prompts, was unable to perform, or did not maintain during the month.

17. *Provide an update on the implementation of needed workplace accommodations and support systems. Indicate NA if the student does not require accommodations or supports* : Enter the end-of-month status for determining or getting accommodations, natural supports or other supports in place on behalf of the student. Enter NA if the student does not need accommodations or supports. When supports are in place, summarize their impact on the student's ability to perform the specific task(s), role, or responsibilities outlined in the job description. Also describe the student's ability to advocate for, manage, and maintain those supports independently.

18. Enter *Name of Employment Specialist* . Signature of the CWTP Employment Specialist signifies that as of the date signed the information is accurate and verifies the completion of the CWTP service(s) outlined within the report.

19. *Submission Date* : Enter the date the monthly report is submitted to the VR Counselor.

Monthly Report Submission

1. Save monthly report (worksheet) to PDF format.

2. Rename file by adding an underscore _ plus the first three letters of the name of the month at the end of the file name.

Example: 356789KentuckyJCReport_Aug

Example: 356789KentuckyJCReport_Jan

3. Submit the monthly report to the VR Counselor by the 5th of the following month.

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Monthly Report File Name Extensions

Add an underscore _ and the first 3 letters of the name of the month to the end of the file name.

_Aug	August
_Sep	September
_Oct	October
_Nov	November
_Dec	December
_Jan	January
_Feb	February
_Mar	March
_Apr	April
_May	May
_Jun	June

Invoice Tab

1. The demographic data from the *Student Info* tab will auto-fill into the invoice. See *Student Info Tab: Data Entry* section on page 1 for a list of the information that will auto-fill.
2. *School Reporting Quarter*: Click on the Down Arrow that appears when the cell is active to select the billing quarter. Q1SFY27 includes August-September, Q2SFY27 includes October-November-December, Q3SF27 includes-January-February-March, and Q4SFY27 includes April-May-June.
3. The *OVR Reporting Quarter* auto-fills upon selection of the *School Reporting Quarter*.
4. *Remit*: The hours for the services provided populates from the *Sum of Hours* section in the *Student Info* tab. If a quarter is over 30 hours conditional formatting will appear in the "hours" cell (red letters/pink background). If more than 30 hours per quarter are needed for a student contact the VR Counselor. The VR Counselor determines if additional hours needed.
5. *CWTP Employment Specialist*: Enter the name of Employment Specialist. Signature of the CWTP Employment Specialist signifies that as of the date signed, the information is accurate and verifies the completion of the CWTP service(s) outlined within the invoice.
6. *Submission Date*: Enter the date the invoice is submitted to the VR Counselor.

Invoice Submission to OVR

1. Save invoice (worksheet) to PDF format. Rename file by adding an underscore _INV and the invoice quarter at the end of the file name.

Example: 356789KentuckyJCReport_INVQ1

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Invoice File Name Extensions

File Name Extension Rule: Add an underscore _ and the INVQ# to the end of the file name.

1st Quarter _INVQ1
2nd Quarter _INVQ2
3rd Quarter _INVQ3
4th Quarter _INVQ4

2. Submit the invoice to the VR Counselor by the 5th of the month following the quarter.

Quarter 1 invoice due October 5

Quarter 2 invoice due January 5

Quarter 3 invoice due April 5

Quarter 4 invoice due no later than July 5. Recommendation: submit as soon as possible upon the completion of services due to the OVR fiscal year end on June 30.