Transition Services File Directions
2026-2027

File Name Rules

1. Master File Name: Transition Services_2026-2027
2. Once downloaded retain a blank copy of the file
3. Rename the file to Transition and delete the school year in the title.

Renaming File for Each Student:

1. Copy the file to each student's electronic folder.
2. Rename the file using the following master rule: **6digitOVRCase#districtnamefilename.**
   County district example: 356789KentuckyCoTransition
   County district sans "county" example: 356789KentuckyTransition
   Independent district example: 356789KentuckyIndTransition
3. Do not include school year in file name. See #2 above.
4. Do not include student name or student initials in file name.

Student Info Tab

Student Information Entry:

1. 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.

2. 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 #).

3. Complete **ALL** Cells: Primary Address to include as applicable House/PO#, Street, Apt.(number or NA. NA is pre-entered but can be changed), City, State (KY is pre-entered but can be changed), Zip Code (xxxxx or xxxxx-xxxx); Student Birthdate; and Primary Email.

Service Status Tab

1. Demographic information populates from Student Info.
2. 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.

Positive Personal Profile Tab

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

1. Demographic information populates from Student Info.
2. Enter the seven-digit Authorization #.
3. Enter the date all components of the PPP are completed and keyed into the form.
4. 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.
5. Enter name of Employment Specialist to verify the completion and accuracy of the Positive Personal Profile.
6. Enter date the PPP is submitted to the VR Counselor.

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

1. Click on the Down arrow and use the Drop Down list to select the School Reporting Quarter in which the PPP was completed. Select Q1SFY27 for Aug-Sept, Q2SFY27 for Oct-Nov-Dec, Q3SFY27 for Jan-Feb-Mar, Q4SFY27 for Apr-May-Jun. Note: Q1SFY28 (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. After selection the OVR Reporting Quarter cell auto-fills.
2. Demographic information populates from the Student Info tab.
3. 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.
4. Remit: Amount billed auto-fills after selection of the Transition Service Provided.
5. Enter name of Employment Specialist to verify the completion of the Report(s) and accuracy of the Invoice.
6. Enter date the invoice is submitted to the VR Counselor.

Positive Personal Profile and Invoice Submission to OVR

1. Save the Positive Personal Profile worksheet to PDF format.
2. Name file by adding an underscore _ and PPP to the end of the file name.

   Example: 356789KentuckyTransition_PPP
3. 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 INVPPPFEICVA or _INV_PPPFEICVA or _ INV_PPP_FEI_CVA

Example: 356789KentuckyTransition_INVPPPFEICVA

Example: 356789KentuckyTransition_INV_PPPFEICVA

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

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

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

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.

Family Engagement Interview Tab

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

1. Demographic information populates from Student Info.
2. Enter the seven-digit Authorization #.
3. Enter the date the individualized components the FEI are completed and documented on the form.
4. 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. Add questions and answers in the two additional text boxes in Section 4, as needed.
5. Enter name of Employment Specialist to verify the completion and accuracy of the Family Engagement Interview.
6. Enter date the FEI is submitted to the VR Counselor.

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

1. Click on the Down arrow and use the Drop Down list to select the School Reporting Quarter in which the PPP was completed. Select Q1SFY27 for Aug-Sept, Q2SFY27 for Oct-Nov-Dec, Q3SFY27 for Jan-Feb-Mar, Q4SFY27 for Apr-May-Jun. Note: Q1SFY28 (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. After selection the OVR Reporting Quarter cell auto-fills.
2. Demographic Information populates from the Student Info tab.
3. 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.
4. Remit: Amount billed auto-fills after selection of the Transition Service Provided.
5. Enter the name of Employment Specialist to verify the completion of the FEI and accuracy of the Invoice.
6. Enter date the invoice is submitted to the VR Counselor.

Family Engagement Interview and Invoice Submission to OVR

1. Save the Family Engagement Interview worksheet to PDF format.
2. Name the file by adding an underscore _ and FEI to the end of the file name.
   Example: 356789KentuckyTransition_FEI

3. Save the Invoice worksheet to PDF format. Name the file by adding <u>one of the following</u> 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 INVPPPFEICVA or _INV_PPPFEICVA or _ INV_PPP_FEI_CVA

Example: 356789KentuckyTransition_INVPPPFEICVA

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

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

4. 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.

CVA Activity Report 1 - CVA Activity Report 2 - CVA Activity Report 3 Tabs

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 are required with up to 20 hours allowable.

Three CVA Activity Report forms are provided. Begin with CVA Activity Report 1. Use additional reports as needed to record all activities completed.

1. Demographic information populates from Student Info.

2, Enter the seven-digit CVA Authorization #.

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

4. Total Amount calculates by formula from the Total Time cell.

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

6. 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.

7. 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.

8. 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:

Health/Medical Conditions : Select when assessing the effects of health or medical conditions and medication(s) on the student while completing tasks at a work or employment sites.

Math: Select when assessing the student's ability to use basic and advanced mathematical skills in work-based settings. Includes the ability to perform calculations, use measurement skills, apply mathematical reasoning, solve problems, make sense of unfamiliar situations, persevere when challenges arise, and apply math concepts to complete workplace tasks.

Time : Select when assessing the student's understanding and use of time-related concepts. Includes awareness of time, ability to understand and use clock functions, ability to read and interpret analog and digital clocks, understanding of schedules and time management, ability to identify break times and transitions throughout the day, and ability to independently use time concepts.

Money Skills : Select when assessing the student's ability to identify and use money, calculate costs and change, use a calculator, apply budgeting skills, understand banking concepts, and demonstrate financial responsibility in workplace and community settings.

Reading : Select when assessing how the student reads written directions, charts or guides to complete tasks and work assignments; recognizes and uses symbols, signs, and maps when traveling to and from a job task; and completes forms and other required information for employer or school.

Familiar Environment : Select when assessing the student's behavior during activities in familiar work environments.

Unfamiliar Environment : Select when assessing the student's behavior during activities in unfamiliar work environments. Includes the student's ability to generalize skills and knowledge to different settings, people and materials/equipment.

Communication: Select when assessing how well the student communicates at work or employment sites in the community in the areas of speech production and use, receptive and expressive language, voice quality and pitch, and fluency.

Social Skill s: Select this open when assessing how well the student interacts with others at school and at work or employment sites in the community. Skills can include but are not limited to level of interest in social interactions; interacting with peers and adults; building and maintaining friendships and relationships; typical interpersonal behaviors displayed; and participating in organized and informal activities. Assessment of social skills also includes language use and context: how the student gives/takes during conversations; adjusts communication style to audience (peers, adults, etc.); recognizes/responds to figures of speech/expressions; recognizes/understands facial expressions, body language, and proximity; etc.

Team Work : Select this option when assessing a student's ability to complete tasks as part of a work team, including reliability, communication effectiveness, active listening, participation, sharing, cooperation, flexibility, work ethic, problem-solving, and respect for team members.

Problem Solving : Select this option when assessing the student's awareness of early signs of problems, determination of best outcomes/solutions, ability to ask for assistance, and ability to request for clarification when needed.

9. Specific work or employment site: enter the name of the work site, business or employer in the community where the activity was conducted. Do not use acronyms. Examples: Hart County High School Library, Hart County Public Library, Tic Toc Tire, Dollar Tree, etc.

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

11. 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.

12. Enter name of Employment Specialist to verify the completion of the assessment activities and accuracy of the CVA Activity Report.

13. Enter date the report is submitted to the VR Counselor.

Invoice Tab: Billing for CVA Activity Report 1 - CVA Activity Report 2 - CVA Activity Report 3

1. Click on the Down arrow and use the Drop Down list to select the School Reporting Quarter in which the PPP was completed. Select Q1SFY27 for Aug-Sept, Q2SFY27 for Oct-Nov-Dec, Q3SFY27 for Jan-Feb-Mar, Q4SFY27 for Apr-May-Jun. Note: Q1SFY28 (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. After selection the OVR Reporting Quarter cell auto-fills.

2. Demographic information populates from the Student Info tab.

3. Transition Service Provided: Click on the Down arrow and use the Drop Down list to select CVA Activity Report 1, CVA Activity Report 2, or CVA Activity Report 3.

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

5. Enter name of Employment Specialist to verify the completion of the CVA student activities and accuracy of the corresponding report and Invoice.

6. Enter date the report is submitted to the VR Counselor. During the CVA completion process the CVA Activity Report(s) are submitted by the 5th of each month.

CVA Activity Report 1 and Invoice Submission to OVR

1. Save the CVA Activity Report 1 worksheet to PDF format. Name file by adding an underscore _ and CVAAR1 to the end of the file name.

   Example: 356789KentuckyTransition_CVASAR1

2. Save the Invoice worksheet to PDF format. Name file by adding an underscore _ and INVCVAAR1 or _INV_CVAAR1 to the end of the file name.

   Example: 356789KentuckyTransition_INVCVAAR1

   Example: 356789KentuckyTransition_INV_CVAAR1

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

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

CVA Activity Report 2 and Invoice Submission to OVR

1. Save the CVA Activity Report 2 worksheet to PDF format. Name file by adding an underscore _ and CVAAR2 to the end of the file name.

   Example: 356789KentuckyTransition_CVAAR2

2. Save the Invoice worksheet to PDF format. Name file by adding an underscore _ and INVCVAAR2 or _INV_CVAAR2 to the end of the file name.

   Example: 356789KentuckyTransition_INVCVAAR2

   Example: 356789KentuckyTransition_INV_CVAAR2

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

   Due Date: The CVA 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.

CVA Activity Report 3 and Invoice Submission to OVR

1. Save the CVA Activity Report 2 worksheet to PDF format. Name file by adding an underscore _ and CVAAR23 to the end of the file name.

   Example: 356789KentuckyTransition_CVAAR3

2. Save the Invoice worksheet to PDF format. Name file by adding an underscore _ and INVCVAAR3 or _INV_CVAAR3 to the end of the file name.

   Example: 356789KentuckyTransition_INVCVAAR3

   Example: 356789KentuckyTransition_INV_CVAAR3

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

   Due Date: The CVA 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.

Vocational Assessment Tab (Comprehensive Vocational Assessment)

1. Demographic information populates from Student Info.

2. Enter the CVA seven-digit Authorization #.

3. Enter date all components of the assessment process and report are completed.

4. Enter the Anticipated Date of HS Exit.

5. Clip on the Down Arrow and use Drop Down list to select Type of Diploma Anticipated. Choices are Regular Diploma or Alternative High School Diploma.

6. 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 (#1-5); Learning Style, and Behavior at Work (#1-5).

7. Enter information for Communication: Primary Language or Mode of Communication.

8. Rate the communication skills observed at work or employments sites in the community.

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.

9. Enter the Social Skills/Interactions observed at school and at work or employment sites in the community.

10. Rate the skills observed during the assessment process in the following areas: Teamwork and Work Skills 1-10 (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, Attendance/Punctuality).

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.

11. Enter information for the student's preferred Work Environment, Co-Workers and Work Schedule.

Summary and Recommendations

12. Enter the recommended Vocational Goal for the Individualized Plan for Employment (IPE)

13. Describe the ideal work tasks that match the student's abilities and job related skills that potential employers may view as assets and value to their business.

14. Enter a summary of the recommended Work Environment, Co-Worders and Schedule.

15. Enter a summary of the Post-High School Transportation Goal and Plan.

16. Enter a summary of the Supports Needed to Achieve Competitive Integrated Employment. Include supports noted in the General Knowledge, Behavior at Work, and Social Skills areas.

17. Enter employers to pursue aligned with the recommended vocational goal. Include contact information.

18. Enter name of Employment Specialist to verify the completion and accuracy of the Comprehensive Vocational Assessment.

19. Enter date the report is submitted to the VR Counselor.

Invoice Tab: Billing for the Comprehensive Vocational Assessment

1. Click on the Down arrow and use the Drop Down list to select the School Reporting Quarter in which the PPP was completed. Select Q1SFY27 for Aug-Sept, Q2SFY27 for Oct-Nov-Dec, Q3SFY27 for Jan-Feb-Mar, Q4SFY27 for Apr-May-Jun. Note: Q1SFY28 (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. After selection the OVR Reporting Quarter cell auto-fills.

2. Demographic information populates from the Student Info tab.

3. 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.

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

5. Enter name of Employment Specialist to verify the completion of the CVA and accuracy of the CVA Invoice.

6. Enter date the invoice is submitted to the VR Counselor.

Comprehensive Vocational Assessment Only and Invoice Submission to OVR

1. 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

2. 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

   Example: 356789KentuckyTransition_INV_CVA

3. 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.

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

1. Demographic information populates from Student Info.
2. Enter the seven-digit Authorization #.
3. Enter date the meeting was held.
4. List the Vocational Goal from the Individual Plan from Employment (IPE). The VR Counselor attending the meeting will provide a copy of the IPE or verbally provide the Vocational Goal.
5. Enter the initial Job Development activities that will support the student in achieving the IPE Vocational Goal.
6. List the potential employers and contacts for Job Development and Job Coaching aligned with the Vocational Goal in the IPE. Revisit the sites listed in the Comprehensive Vocational Assessment, as applicable.
7. List any concerns about providing services and steps to address them. Concerns may include but are not limited to transportation, medical issues, accommodations, and supports needed. Summarize the discussion led by the VR Counselor about Supported Employment, if included on the IPE of the student.
8. 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.
9. Enter name of Employment Specialist to verify the completion of the Job Development/Job Coaching Meeting and accuracy of the content within the form.
10. Enter date the report is submitted to the VR Counselor.

Invoice Tab: Billing for JD/JC Planning Meeting Report

1. Click on the Down arrow and use the Drop Down list to select the School Reporting Quarter in which the PPP was completed. Select Q1SFY27 for Aug-Sept, Q2SFY27 for Oct-Nov-Dec, Q3SFY27 for Jan-Feb-Mar, Q4SFY27 for Apr-May-Jun. Note: Q1SFY28 (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. After selection the OVR Reporting Quarter cell auto-fills.
2. Demographic information populates from the Student Info tab.
3. Transition Service Provided: Click on the Down arrow and use the Drop Down list to select Job Development/Job Coaching Planning Meeting.
4. Remit: Amount billed auto-fills after selection of the Transition Service Provided.
5. Enter name of Employment Specialist to verify the completion of the JD/JC Planning Meeting and accuracy of the corresponding report and Invoice.
6. Enter date the report is submitted to the VR Counselor.

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

1. 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

2. 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

3. 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.

Supported Employment Meeting Tab

1. Demographic information populates from Student Info.
2. Enter the Vocational Goal from the Individual Plan for Employment.
3. Enter the seven-digit Authorization #.
4. Enter date the meeting was held.
5. Enter the VR Counselor expectations for this student and questions to be answered, in relation to Supported Employment services.
6. Describe the steps that need to be completed by the end of the school year to transition a student into Supported Employment services
7. Describe the plan for collaboration(specific tasks) between the CWTP Employment Specialist and Community Rehabilitation Provider.
8. List the supports the student needs for transfer/transition from the CWTP Employment Specialist and the Community Rehabilitation Provider (CRP).

9. 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.
10. Enter name of Employment Specialist to verify the Supported Employment Meeting occurred and accuracy of the content within the form.
11. Enter date the report is submitted to the VR Counselor.

Invoice Tab: Billing for Supported Employment Meeting Report

1. Click on the Down arrow and use the Drop Down list to select the School Reporting Quarter in which the PPP was completed. Select Q1SFY27 for Aug-Sept, Q2SFY27 for Oct-Nov-Dec, Q3SFY27 for Jan-Feb-Mar, Q4SFY27 for Apr-May-Jun. Note: Q1SFY28 (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. After selection the OVR Reporting Quarter cell auto-fills.

2, Demographic information populates from the Student Info tab.

3. Transition Service Provided: Click on the Down arrow and use the Drop Down list to select Supported Employment Meeting.
4. Remit: Amount billed auto-fills after selection of the Transition Service Provided.

5. Enter name of Employment Specialist to verify the completion of the Supported Employment Meeting and accuracy of the corresponding report and Invoice.
6. Enter date the invoice is submitted to the VR Counselor.

Supported Employment Meeting Report and Invoice Submission to OVR

1. 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

2. 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

3. 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.

Exit Planning Meeting Tab

1. Demographic information populates from the Student Info tab.
2. Enter the seven-digit Authorization #.
3. Enter date the meeting was held.
4. 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.

5. Student's Post High School Contact Information: Information in this section populates from the Student Info tab.
6. 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.
7. Enter the Vocational Goal from the student's Individual Plan for Employment.
8. 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.
9. Current Job Site: Enter the full name of the student's current job site. Enter NA if student has not yet attained competitive integrated employment aligned with the IPE vocational goal.
10. #Hours per Week: Enter the number of hours per week the student works at the current job site. Enter NA if the student has not yet attained competitive integrated employment aligned with the IPE vocational goal.
11. 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. Include types of Job Development activities planned if the student is still seeking employment. Include Job Coaching activities to complete if the student attained employment aligned with the vocational goal from the Individualized Plan for Employment.
12. Enter the description the Employment Follow-up action plan:

   a. Describe the actions needed during post-school employment follow-up support. Indicate the expected timeframe for the minimum of one onsite visit with the student and employer, number of additional contacts with student per week or month, contact methods (phone, email, text, online meeting),and any contact needed with the parent.

   b. Describe the type and level of support(s) needed to maintain employment after high school, e.g., natural supports in the work environment, family support, assistive technology, accommodations, support needed due to change in work hours or transportation method after HS exit.

   c. Indicate if no post-high school supports are needed.

13. Adult Service Providers: Enter other adult service providers needed by the student if any. Examples include independent living, benefits planning, Supported Employment, OVR general transition services.
14. Enter the name and title of meeting attendees.
15. Enter name of Employment Specialist to verify the Exit Planning Meeting occurred and accuracy of the content within the form.
16. Enter date the report is submitted to the VR Counselor.

Invoice Tab: Billing for Exit Planning Meeting

1. Click on the Down arrow and use the Drop Down list to select the School Reporting Quarter in which the PPP was completed. Select Q1SFY27 for Aug-Sept, Q2SFY27 for Oct-Nov-Dec, Q3SFY27 for Jan-Feb-Mar, Q4SFY27 for Apr-May-Jun. Note: Q1SFY28 (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. After selection the OVR Reporting Quarter cell auto-fills.
2. Demographic information populates from the Student Info tab.
3. Transition Service Provided: Click on the Down arrow and use the Drop Down list to select Exit Planning Meeting.
4. Remit: Amount billed auto-fills after selection of the Transition Service Provided.
5. Enter name of Employment Specialist to verify the completion of the Exit Planning Meeting, corresponding form, and accuracy of the Invoice.
6. Enter date the invoice is submitted to the VR Counselor.

Exit Planning Meeting and Invoice Submission to OVR

1. 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

2. Save the Invoice worksheet to PDF format. Names file by adding an underscore _ and INVEPM or INV_EPM to the end of the file name.

   Example: 356789KentuckyTransition_INVEPM

   Example: 356789KentuckyTransition_INV_EPM

3. 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.

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.

1. Demographic information populates from the Student Info tab.
2. Enter the seven-digit Authorization #.
3. Enter date the report was completed.

4. The Vocational Goal from the Individual Plan for Employment populates from the Exit Planning Meeting Report.
5. Enter Name of Employer, Address, Phone, and Supervisor Name and Position

6. Indicate if the employment is within a competitive integrated employment. Select Yes or No from the dropdown box.
Competitive Integrated Employment means work that is performed on a full-time or part-time basis for which an individual is earning compensation at or above minimum wage and comparable to the customary rate paid by the employer to employees without disabilities performing similar duties and with similar training and experience; receiving the same level of benefits provided to other employees without disabilities in similar positions; working at a location where the employee interacts with other individuals without disabilities; and receiving opportunities for advancement when appropriate similar to other employees without disabilities in similar positions.
7. Enter Date Hired (must be prior to high school exit date)
8. Enter Date of High School Exit
9. Enter OVR Employed Status Date (Cannot be before student's exit date. Enter day after high school exit.)
10. Enter Job Classification/Title, Current Job Duties, and What the Student likes about the job
11. 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).
12. Enter Hourly Wage and Hours per Week.
13. Click on the Down Arrow and use Drop Down list to select Yes or No to indicate if Health Insurance is a benefit provided to the student.
14. Enter Progress Notes.
15. Enter a Description of Concerns to address during Employment Follow-up Services. Concerns may include but are not limited to adjusting to longer post-HS work hours, transportation post-high school, or adjusting to lack of support from CWTP Employment Specialist.
16. Enter name of Employment Specialist 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.
17. Enter date the report is submitted to the VR Counselor.

Invoice Tab: Billing for Job Placement Report

1. Click on the Down arrow and use the Drop Down list to select the School Reporting Quarter in which the PPP was completed. Select Q1SFY27 for Aug-Sept, Q2SFY27 for Oct-Nov-Dec, Q3SFY27 for Jan-Feb-Mar, Q4SFY27 for Apr-May-Jun. Note: Q1SFY28 (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. After selection the OVR Reporting Quarter cell auto-fills.
2. Demographic information populates from the Student Info tab.
3. Transition Service Provided: Click on the Down arrow and use the Drop Down list to select Job Placement Report.
4. Remit: Amount billed auto-fills after selection of the Transition Service Provided.
5. Enter name of Employment Specialist to verify Job Placement and the accuracy of the corresponding report and Invoice.
6. Enter date invoice is submitted to the VR Counselor.

Job Placement Report and Invoice Submission to OVR

1. 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
2. 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
3. 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.

Employment Follow-up Report@30 Tab

1. Demographic Data Information populates from Student Info tab.
2. Enter the seven-digit Authorization #.
3. Enter date the report was completed.
4. Enter date the On-site Visit with Student and Employer occurred. Employment Follow-up services include at least one on-site visit with the student and employer at the place of employment and other types of contact (phone, email, online meeting, or text) with the student and employer. Follow-up activities can include contact with the parent, as appropriate.
5. Vocational Goal from the Individual Plan for Employment populates from the Job Placement Report.
6. Name of Employer populates from the Job Placement Report.
7. Job Classification/Title populates from the Job Placement Report.
8. Job Duties populates from the Job Placement Report.
9. Date Hired populates from the Job Placement Report.
10. High School Exit Date populates from the Job Placement Report.
11. OVR Employed Status Date populates from the Job Placement Report.
12. Date Employment Specialist Follow-up Services End calculates from the OVR Employed Status Date in Job Placement Report.
13. Hourly wage populates from the Job Placement Report.
14. Hours per Week populates from the Job Placement Report.
15. Health Insurance populates from the Job Placement Report.
16. Enter Transportation Information and Current Schedule.
17. Current Supervisor populates from the Job Placement Report.
18. Employer Phone populates from the Job Placement Report.
19. Click on the Down Arrow and use the Drop Down list to select Yes or No for whether Natural Supports are in place. If no, explain why not in the comment box.
20. Answer the following questions to determine if the student has maintained stable employment:

   Is the student's employment within a competitive integrated environment? Status Auto-fills from the Job Placement Report

   Click on the Down Arrow and use Drop Down list to select Yes or No for the remaining stable employment questions below.

   Is the student satisfied with current job?

   Is employer satisfied with student?

   Is the student at risk of termination or write-up?

   Has the student worked consistent hours?

   Does the student work for a secure business?

   Has the student been in good standing with the employer for 30 days after exiting high school?

21. Optional: With permission, submit a copy of the recent payroll stub when emailing the report to the VR Counselor.

22. If the student has maintained stable employment for 30 calendar days, use the Drop-down arrow to select answer Yes, No or NA to the question below:

Is there an expectation that the student will continue to be successful in the position?

If no, describe why not in the comment box.

23. Enter name of Employment Specialist to verify the completion of the 30 days Employment Follow-up services and accuracy of the content within the Employment Follow-up Report.

24. Enter date the report is submitted to the VR Counselor.

Invoice Tab: Billing Employment Follow-up Report

1. Click on the Down arrow and use the Drop Down list to select the School Reporting Quarter in which the PPP was completed. Select Q1SFY27 for Aug-Sept, Q2SFY27 for Oct-Nov-Dec, Q3SFY27 for Jan-Feb-Mar, Q4SFY27 for Apr-May-Jun. Note: Q1SFY28 (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. After selection the OVR Reporting Quarter cell auto-fills.

2. Demographic information populates from the Student Info tab.

3. Transition Service Provided: Click on the Down arrow and use the Drop Down list to select Employment Follow-up Report.

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

5. 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

1. 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

2. 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

3. 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

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