

Understanding the Coordination of Funding Responsibility Determination and Individual Plan

The Coordination of Funding Responsibility Determination and Individual Plan form will be received by the Case Manager and Employment Specialist in response to the Coordination of Funding Submission Form.

This document explains the response you will receive.

Coordination of Funding Responsibility Determination and Individual Plan													
Participant Name:	Sample, Samuel A.	SSN:	123-45-6789	DOB:	06/10/2000	Age:	26	County:	Franklin	Funding:	SCL		
Service Being Evaluated:	Traditional Supported Employment			Record Search:	Office of Vocational Rehabilitation								
Recent Activities:				Funding Determination									
Exited from Services at referral		Date	09/16/2018	From the information provided services are currently:							Unavailable		
Person Centered Job Selection		Date Ended	12/31/2022	First step:		Initiate Services Using Waiver Funding							
Multiple Cases		Last Date	02/12/2024	Next:		Transition to OVR services when available							
Order of Selection		Date Added	05/21/2024	Next :		Transition to Waiver for long-term support							
To schedule an appointment contact:				Select or Enter									
Intake Worker		by telephone	502-395-0000										
Reviewed By:		Gloria Gibson		Office of Vocational Rehabilitation		Date:	07/13/2026						
Traditional Supported Employment		to be requested / Prior Authorized from									07/16/2026	through	06/25/2027
The service is completed when:													
Initial Service:	Person-centered Job Selection (update)			PCEP is updated and accepted by the Person-Centered Team.									
	60 units or less	up to four months											
Next service:	Job Development			The participant accepts an offer of employment.									
	90 units or less	up to four months											
Next Service:	Job Acquisition with Support and Stabilization			Participant is proficient with job tasks, has integrated into the workplace culture, and a Long-term Employment Support Plan is completed.									
	up to 800 units	when completed											
Next Service:	Long-term Employment Supports			Not completed. Continues based upon the contents of the Long-term Employment Support Plan.									
	as justified in the LTSP	six months											
Other services on the Participant's Person-centered Service Plan or available in the community that could enhance outcomes:													
Prevocational	To maintain engagement, begin career development activities immediately via Day Training, CLS, or Community Access while arranging supported employment. Resources are available to assist.												
WIPA Services	WIPA provides free, expert guidance to help participants understand how working impacts SSI, SSDI, and healthcare. We strongly recommend these services to manage benefit changes and achieve financial independence.												
Transportation	Waiver-supported employment transportation for PCEP or job development is a provider business cost. Last resort daily commutes may be covered by NEMT or PDS allocations. OVR assistance is available at the counselor's discretion												
Personal Assistance	Personal assistance helps with work-related grooming, hygiene, and attire, including workplace toileting support. Responsibility depends on the specific waiver provider (Residential, PA, or CLS)												
Behavior Supports	While direct workplace intervention by behavior specialists isn't recommended, they should consult on issues, update plans, and advise employment specialists on effective strategies.												
Natural Support Training	While initial coworker training is the employment provider's responsibility, Natural Support Training may be needed later—especially if the person struggles with coworker interactions. This service is covered under the SCL waiver.												
Reviewed By:		Jeff White		Division of Developmental and Intellectual Disabilities		Date:	07/14/2026						

Recent Activities:

Exited from Services at referral	Date	09/16/2018
Person Centered Job Selection	Date Ended	12/31/2022
Multiple Cases	Last Date	02/12/2024
Order of Selection	Date Added	05/21/2024

Search of Recent Records

This section documents the recent activities the person has taken part in with the organization whose records are being searched.

In this case, the person's records with the Office of Vocational Rehabilitation revealed multiple interactions including the successful completion of Person-Centered Job Selection. This implies there is an existing Person-Centered Employment Plan for the person which may, or may not, still be valid.

It also indicates the person is currently on the waiting list for OVR Supported Employment services.

It is important that the employment specialist be aware of this information as they make plans to support the person.

Coordination of Funding Responsibility Determination and Individual Plan

Participant Name: SSN: DOB: Age: County: Funding:

Service Being Evaluated: Record Search:

Recent Activities:

Exited from Services at referral	Date	09/16/2018
Person Centered Job Selection	Date Ended	12/31/2022
Multiple Cases	Last Date	02/12/2024
Order of Selection	Date Added	05/21/2024

To schedule an appointment contact:
Intake Worker by telephone

Reviewed By: Office of Vocational Rehabilitation Date:

Funding Determination

From the information provided services are currently:

First step:

Next:

Next:

Select or Enter

to be requested / Prior Authorized from through

The service is completed when:

Initial Service: Person-centered Job Selection (update)	60 units or less up to four months	PCEP is updated and accepted by the Person-Centered Team.
Next service: Job Development	90 units or less up to four months	The participant accepts an offer of employment.
Next Service: Job Acquisition with Support and Stabilization	up to 800 units when completed	Participant is proficient with job tasks, has integrated into the workplace culture, and a Long-term Employment Support Plan is completed.
Next Service: Long-term Employment Supports	as justified in the LTSP six months	Not completed. Continues based upon the contents of the Long-term Employment Support Plan.

Other services on the Participant's Person-centered Service Plan or available in the community that could enhance outcomes:

Prevocational	To maintain engagement, begin career development activities immediately via Day Training, CLS, or Community Access while arranging supported employment. Resources are available to assist.
WIPA Services	WIPA provides free, expert guidance to help participants understand how working impacts SSI, SSDI, and healthcare. We strongly recommend these services to manage benefit changes and achieve financial independence.
Transportation	Waiver-supported employment transportation for PCEP or job development is a provider business cost. Last resort daily commutes may be covered by NEMT or PDS allocations. OVR assistance is available at the counselor's discretion
Personal Assistance	Personal assistance helps with work-related grooming, hygiene, and attire, including workplace toileting support. Responsibility depends on the specific waiver provider (Residential, PA, or CLS)
Behavior Supports	While direct workplace intervention by behavior specialists isn't recommended, they should consult on issues, update plans, and advise employment specialists on effective strategies.
Natural Support Training	While initial coworker training is the employment provider's responsibility, Natural Support Training may be needed later—especially if the person struggles with coworker interactions. This service is covered under the SCL waiver.

Funding Determination

From the information provided services are currently: **Unavailable**

First step: **Initiate Services Using Waiver Funding**

Next: **Transition to OVR services when available**

Next : **Transition to Waiver for long-term support**

Select or Enter

Determination of Funding Responsibility

This section documents the immediate responsibility for funding the services the person is seeking, as well as charting any funding changes that may occur over the plan year.

In this case, the person is not immediately eligible for funding through the Office of Vocational Rehabilitation. The initial step to assist the person meet their desired outcome would be the use of waiver funding. When waiver services are established, if the person is not already on the OVR waiting list, they **must be supported** to apply for services from OVR and seek waiting list placement. When the person is notified that services are available for them through OVR, the person **must transition** to OVR funding. If funding responsibility has transitioned to OVR, at some point in the future when the person becomes employed, becomes proficient performing their job tasks, and acclimates to the workplace culture at their work site, the person will need to transition back to long-term employment supports funded through the waiver.

Coordination of Funding Responsibility Determination and Individual Plan

Participant Name:	Sample, Samuel A.	SSN:	123-45-6789	DOB:	06/10/2000	Age:	26	County:	Franklin	Funding:	SCL
Service Being Evaluated:	Traditional Supported Employment				Record Search:	Office of Vocational Rehabilitation					
Recent Activities:											
Exited from Services at referral		Date	09/16/2018								
Person Centered Job Selection		Date Ended	12/31/2022								
Multiple Cases		Last Date	02/12/2024								
Order of Selection		Date Added	05/21/2024								
To schedule an appointment contact:											
Intake Worker		by telephone	502-395-0000								
Reviewed By:		Gloria Gibson		Office of Vocational Rehabilitation	Date:	07/13/2026					

Funding Determination

From the information provided services are currently: **Unavailable**

First step: **Initiate Services Using Waiver Funding**

Next: **Transition to OVR services when available**

Next : **Transition to Waiver for long-term support**

Select or Enter

Traditional Supported Employment		to be requested / Prior Authorized from	07/16/2026	through	06/25/2027
The service is completed when:					
Initial Service:	Person-centered Job Selection (update)		PCEP is updated and accepted by the Person-Centered Team.		
	60 units or less	up to four months			
Next service:	Job Development		The participant accepts an offer of employment.		
	90 units or less	up to four months			
Next Service:	Job Acquisition with Support and Stabilization		Participant is proficient with job tasks, has integrated into the workplace culture, and a Long-term Employment Support Plan is completed.		
	up to 800 units	when completed			
Next Service:	Long-term Employment Supports		Not completed. Continues based upon the contents of the Long-term Employment Support Plan.		
	as justified in the LTSP	six months			

Other services on the Participant's Person-centered Service Plan or available in the community that could enhance outcomes:

Prevocational	To maintain engagement, begin career development activities immediately via Day Training, CLS, or Community Access while arranging supported employment. Resources are available to assist.
WIPA Services	WIPA provides free, expert guidance to help participants understand how working impacts SSI, SSDI, and healthcare. We strongly recommend these services to manage benefit changes and achieve financial independence.
Transportation	Waiver-supported employment transportation for PCEP or job development is a provider business cost. Last resort daily commutes may be covered by NEMT or PDS allocations. OVR assistance is available at the counselor's discretion
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Reviewed By: **Jeff White** Division of Developmental and Intellectual Disability Date: **07/14/2026**

To schedule an appointment contact:

Intake Worker	by telephone	502-395-0000
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Contact with Alternate Source of Funding

This section identifies whom to contact with the alternative source of funding to meet the requirements of the Determination of Funding Responsibility section.

In this case there is a generic title for the person to be contacted in the appropriate OVR office (if we have a specific contact name, we will provide it), the office prefers contact be made by telephone, and a telephone number is provided. Some offices prefer contact be made via email. If that is the case, that information will be provided.

Coordination of Funding Responsibility Determination and Individual Plan											
Participant Name:	Sample, Samuel A.	SSN:	123-45-6789	DOB:	06/10/2000	Age:	26	County:	Franklin	Funding:	SCL
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Recent Activities:				Funding Determination							
Exited from Services at referral		Date	09/16/2018	From the information provided services are currently:				Unavailable			
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Order of Selection		Date Added	05/21/2024	Next :		Transition to Waiver for long-term support					
To schedule an appointment contact:				Select or Enter							
Intake Worker		by telephone	502-395-0000								
Reviewed By:		Gloria Gibson		Office of Vocational Rehabilitation		Date:		07/13/2026			
Traditional Supported Employment		to be requested / Prior Authorized from		07/16/2026		through		06/25/2027			
Initial Service:		Person-centered Job Selection (update)		The service is completed when:							
60 units or less		up to four months		PCEP is updated and accepted by the Person-Centered Team.							
Next service:		Job Development		The participant accepts an offer of employment.							
90 units or less		up to four months									
Next Service:		Job Acquisition with Support and Stabilization		Participant is proficient with job tasks, has integrated into the workplace culture, and a Long-term Employment Support Plan is completed.							
up to 800 units		when completed									
Next Service:		Long-term Employment Supports		Not completed. Continues based upon the contents of the Long-term Employment Support Plan.							
as justified in the LTSP		six months									
Other services on the Participant's Person-centered Service Plan or available in the community that could enhance outcomes:											
Prevocational	To maintain engagement, begin career development activities immediately via Day Training, CLS, or Community Access while arranging supported employment. Resources are available to assist.										
WIPA Services	WIPA provides free, expert guidance to help participants understand how working impacts SSI, SSDI, and healthcare. We strongly recommend these services to manage benefit changes and achieve financial independence.										
Transportation	Waiver-supported employment transportation for PCEP or job development is a provider business cost. Last resort daily commutes may be covered by NEMT or PDS allocations. OVR assistance is available at the counselor's discretion										
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Reviewed By:		Jeff White		Division of Developmental and Intellectual Disabilities		Date:		07/14/2026			

Traditional Supported Employment

to be requested / Prior Authorized from

07/16/2026

through

06/25/2027

The service is completed when:

Initial Service:

Person-centered Job Selection (update)

60 units or less

up to four months

PCEP is updated and accepted by the Person-Centered Team.

Next service:

Job Development

90 units or less

up to four months

The participant accepts an offer of employment.

Next Service:

Job Acquisition with Support and Stabilization

up to 800 units

when completed

Participant is proficient with job tasks, has integrated into the workplace culture, and a Long-term Employment Support Plan is completed.

Next Service:

Long-term Employment Supports

as justified in the LTSP

six months

Not completed. Continues based upon the contents of the Long-term Employment Support Plan.

Sequence of the Targeted Service to be Requested/Prior-Authorized

This section identifies the sequence of services to be utilized to move the person toward their chosen outcome during the participant’s current plan year. The date range of prior-authorizations to be requested corresponds to the date of completion of the Coordination of Funding process through the end of the person’s plan year.

This example assumes the continuation of the OVR order of selection throughout the course of the plan year and is comprised of waiver services with corresponding anticipated units, timeframes and conditions to be met to move to the next service in the sequence. Should the person be notified of OVR funding availability, we should be notified immediately, will revise the document braiding waiver and OVR employment services, and work with OVR and the Case Manager to appropriately transition funding responsibility.

The coordination of funding process must be renewed for each service plan year.

Coordination of Funding Responsibility Determination and Individual Plan

Participant Name:

Sample, Samuel A.

SSN:

123-45-6789

DOB:

06/10/2000

Age:

26

County:

Franklin

Funding:

SCL

Service Being Evaluated:

Traditional Supported Employment

Record Search:

Office of Vocational Rehabilitation

Recent Activities:

Exited from Services at referral

Date

09/16/2018

Person Centered Job Selection

Date Ended

12/31/2022

Multiple Cases

Last Date

02/12/2024

Order of Selection

Date Added

05/21/2024

To schedule an appointment contact:

Intake Worker

by telephone

502-395-0000

Reviewed By:

Gloria Gibson

Office of Vocational Rehabilitation

Date:

07/13/2026

Funding Determination

From the information provided services are currently:

Unavailable

First step:

Initiate Services Using Waiver Funding

Next:

Transition to OVR services when available

Next :

Transition to Waiver for long-term support

Select or Enter

Traditional Supported Employment

to be requested / Prior Authorized from

07/16/2026

through

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The service is completed when:

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Person-centered Job Selection (update)

60 units or less

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90 units or less

up to four months

The participant accepts an offer of employment.

Next Service:

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up to 800 units

when completed

Participant is proficient with job tasks, has integrated into the workplace culture, and a Long-term Employment Support Plan is completed.

Next Service:

Long-term Employment Supports

as justified in the LTSP

six months

Not completed. Continues based upon the contents of the Long-term Employment Support Plan.

Other services on the Participant's Person-centered Service Plan or available in the community that could enhance outcomes:

Prevocational

To maintain engagement, begin career development activities immediately via Day Training, CLS, or Community Access while arranging supported employment. Resources are available to assist.

WIPA Services

WIPA provides free, expert guidance to help participants understand how working impacts SSI, SSDI, and healthcare. We strongly recommend these services to manage benefit changes and achieve financial independence.

Transportation

Waiver-supported employment transportation for PCEP or job development is a provider business cost. Last resort daily commutes may be covered by NEMT or PDS allocations. OVR assistance is available at the counselor's discretion

Personal Assistance

Personal assistance helps with work-related grooming, hygiene, and attire, including workplace toileting support. Responsibility depends on the specific waiver provider (Residential, PA, or CLS)

Behavior Supports

While direct workplace intervention by behavior specialists isn't recommended, they should consult on issues, update plans, and advise employment specialists on effective strategies.

Natural Support Training

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Reviewed By:

Jeff White

Division of Developmental and Intellectual Disability

Date:

07/14/2026

Other services on the Participant's Person-centered Service Plan or available in the community that could enhance outcomes:

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Other Waiver and Non-waiver Services that can Enhance the Likelihood of a Successful Employment Outcome

This section identifies other services, both on the person’s service plan or otherwise available in the community that can help the person find employment, meet employer’s expectations, and maintain employment,

These services are presented based upon the person-centered team’s interpretation of the person’s needs. It is expected that, where appropriate, specific goals and objectives be developed and integrated into the person-centered service plan in support of the employment outcome.

Coordination of Funding Responsibility Determination and Individual Plan

Participant Name: Sample, Samuel A. SSN: 123-45-6789 DOB: 06/10/2000 Age: 26 County: Franklin Funding: SCL

Service Being Evaluated: Traditional Supported Employment Record Search: Office of Vocational Rehabilitation

Recent Activities:

Exited from Services at referral	Date	09/16/2018	From the information provided services are currently:	Unavailable
Person Centered Job Selection	Date Ended	12/31/2022	First step:	Initiate Services Using Waiver Funding
Multiple Cases	Last Date	02/12/2024	Next:	Transition to OVR services when available
Order of Selection	Date Added	05/21/2024	Next :	Transition to Waiver for long-term support

To schedule an appointment contact:

Intake Worker by telephone 502-395-0000

Reviewed By: Gloria Gibson Office of Vocational Rehabilitation Date: 07/13/2026

Traditional Supported Employment to be requested / Prior Authorized from 07/16/2026 through 06/25/2027

The service is completed when:

Initial Service: Person-centered Job Selection (update) 60 units or less up to four months	PCEP is updated and accepted by the Person-Centered Team.
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