

Transition Services File Directions

File Name Rules

Master File Name	Transition Services Once downloaded the file name may be shortened to Transition.
Renaming File for Each Student	6digitOVRCase#districtnamefilename No student names or student initials in file names County district example: 356789KentuckyCoTransition County district sans "county" example: 356789KentuckyTransition Independent district example: 356789KentuckyIndTransition

Student Info Tab

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 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 and Primary Phone Note (clarifying information about phone #); Alternate/Secondary Phone 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.
Transition Services and Amount Billed	The cells in this field are locked. User cannot type into this section. The Amount Billed and Date will calculate automatically when the CWTP Primary Contact dates each form as verified and accurate.

Vocational Assessment Tab Comprehensive Vocational Assessment

Demographic Data Entry	Demographic information populates from Student Info.
Click into or tab to each cell to enter information for:	Section I. Previous Work Experience and Section II. Current Status through the Social Skills/Interactions section.
Click on the Down Arrow and use Drop Down list to select Independent (I), With Assistance (WA) or Area of Concern (AC) for:	Section II. 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 Good Attendance/Punctuality.
Click into or tab to each cell to enter information for:	any Area of Concern. Add specifics or comments about the concern.
Click into or tab to each cell to enter information for:	Intensity of Supports Needed and Work Environment/Schedule in Section II and all areas in Section III.
CWTP Employment Specialist Signature & Date	Employment Specialist signs and dates to verify the completion and accuracy of the Comprehensive Vocational Assessment.

Transition Services File Directions

Billing Statement Tab: Billing for the Comprehensive Vocational Assessment

Click on the Down arrow and use the Drop Down list to select:	School Reporting Quarter - Q1SFY21, Q2SFY21, Q3SFY21 or Q4SFY21. After selection the OVR Reporting Quarter auto-fills. Note: Q1SFY22 (last quarter in the list) can only be used for the Employment Follow-up Report.
Demographic Data Entry	Information populates from the Student Info tab.
Transition Service Provided - Click on the Down arrow and use the Drop Down list to select:	Comprehensive Vocational Assessment
Remit	Amount billed auto-fills after selection of the Transition Service Provided.
CWTP Employment Specialist Signature & Date	Employment Specialist signs and dates to verify the completion of the CVA and accuracy of the CVA billing statement.

Comprehensive Vocational Assessment and Billing Statement Review and Submission to OVR

Primary CWTP Contact	Reviews then signs and dates to verify the completion and accuracy of the Comprehensive Vocational Assessment.
	Saves the Vocational Assessment worksheet to PDF format. Names file by adding an underscore _ and CVA to the end of the file name.
	Example: 356789KentuckyTransition_CVA
	Reviews then signs and dates to verify completion of the CVA and accuracy of the billing statement.
	Saves the Billing Statement worksheet to PDF format. Names file by adding an underscore _ and BSCVA or BS_CVA to the end of the file name.
	Example: 356789KentuckyTransition_BSCVA
	Example: 356789KentuckyTransition_BS_CVA
	Submit both PDF files to OVR (email or VR Counselor access to shared drive)

CVA and Billing Statement Due Date

	The CVA and billing statement are submitted to OVR upon completion and within the quarter authorized.
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JD_JC Planning Meeting Tab Job Development/Job Coaching Planning Meeting

Demographic Data Entry	Demographic information populates from Student Info.
Click into or tab to each cell to enter:	Explanation of Transition Plan (Activities), Potential Business & Contacts for Job Development, and Concerns to address and plans to address the concerns.
Click into or tab to each cell to enter Attendees:	Student, Employment Specialist, OVR Counselor must attend in order to bill OVR for meeting. Include other attendee(s), if any.
CWTP Employment Specialist Signature & Date	Employment Specialist signs and dates to verify the completion of the Job Development/Job Coaching Meeting and accuracy of the content within the form.

Transition Services File Directions

Billing Statement Tab: Billing for JD/JC Planning Meeting Report

Click on the Down arrow and use the Drop Down list to select:	School Reporting Quarter - Q1SFY21, Q2SFY21, Q3SFY21 or Q4SFY21. After selection the OVR Reporting Quarter auto-fills. Note: Q1SFY22 (last quarter in the list) can only be used for the Employment Follow-up Report.
Demographic Data Entry	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.
CWTP Employment Specialist Signature & Date	Employment Specialist signs and dates to verify the completion of the JD/JC Planning Meeting, corresponding report, and accuracy of the billing

JD/JC Planning Meeting Report and Billing Statement Review and Submission to OVR

Primary CWTP Contact	Reviews then signs and dates to verify completion of the JD/JC Planning Meeting and accuracy of the contents of the report.
	Saves the JD_JC Planning Meeting worksheet to PDF format. Names file by adding an underscore _ and JDJCPMR to the end of the file name.
	Example: 356789KentuckyTransition_JDJCPMR
	Reviews then signs and dates to verify the completion of the JD/JC Planning Meeting, corresponding report, and accuracy of the billing statement.
	Saves the Billing Statement worksheet to PDF format. Names file by adding an underscore _ and BSJDJCPMR or _BS_JDJCPMR to the end of the file name.
	Example: 356789KentuckyTransition_BSJDJCPMR
	Example: 356789KentuckyTransition_BS_JDJCPMR
Submits both PDF files to OVR (email or VR Counselor access to shared drive).	

JD/JC Planning Meeting and Billing Statement Due Date

	The Job Development/Job Coaching Planning Meeting Report and billing statement are submitted to OVR upon completion and within the quarter authorized.
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Exit Planning Meeting Tab

Demographic Data Entry	Demographic information populates from the Student Info tab.
Anticipated Graduation Date:	Enter anticipated date of graduation. The exact graduation date is likely not 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 alternative contacts that have telephones.

Transition Services File Directions

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 IPE Goal:	Type the student's current Individual Plan for Employment (IPE) goal.
Current Job Site:	Enter the full name of the student's current job site.
#Hrs. per Week:	Enter the number of hours per week the student works at the current job site.
Click into or tab to each cell to enter:	Follow-up Action Plan and Supported Employment Provider.
Click into or tab to each cell to enter Attendees:	Student, Employment Specialist, OVR Counselor must attend in order to bill OVR for meeting. Include other attendee(s), if any.
CWTP Employment Specialist Signature & Date	Employment Specialist signs and dates to verify the completion of the Exit Planning Meeting and the accuracy of the content within the form.

Billing Statement Tab: Billing for Exit Planning Meeting

Click on the Down arrow and use the Drop Down list to select:	School Reporting Quarter - Q1SFY21, Q2SFY21, Q3SFY21 or Q4SFY21. After selection the OVR Reporting Quarter auto-fills. Note: Q1SFY22 (last quarter in the list) can only be used for the Employment Follow-up Report.
Demographic Data Entry	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.
CWTP Employment Specialist Signature & Date	Employment Specialist signs and dates to verify the completion of the Exit Planning Meeting, corresponding form, and accuracy of the billing statement.

Exit Planning Meeting and Billing Statement Review and Submission to OVR

Primary CWTP Contact	Reviews then signs and dates to verify completion of the Exit Planning Meeting and accuracy of the contents of the form.
	Saves the Exit Planning Meeting worksheet to PDF format. Names file by adding an underscore _ and EPM to the end of the file name.
	Example: 356789KentuckyTransition_EPM
	Reviews then signs and dates to verify the completion of the Exit Planning Meeting, corresponding form, and accuracy of the billing statement.
	Saves the Billing Statement worksheet to PDF format. Names file by adding an underscore _ and BSEPM or BS_EPM to the end of the file name.
	Example: 356789KentuckyTransition_BSEPM
	Example: 356789KentuckyTransition_BS_EPM
	Submits both PDF files to OVR (email or VR Counselor access to shared drive).

Transition Services File Directions

Exit Planning Meeting and Billing Statement Due Date

	The Exit Planning Meeting form and billing statement are submitted to OVR upon completion and within the quarter authorized.
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Job Placement Report Tab

Demographic Data Entry	Demographic information populates from the Student Info tab.
Click into or tab to each cell to enter:	Name of Employer, Address, Phone, and Supervisor Name and Position
	Date Hired (must be prior to school exit date)
	Date Graduated High School
	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.
Click into or tab to each cell to 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
Click into or Tab to each cell to enter:	Progress Notes and Description of Concerns to address during Employment Follow-up Services.
CWTP Employment Specialist Signature & Date	Employment Specialist signs and dates to verify the completion of Job Placement and accuracy of the contents within the Job Placement Report.

Billing Statement Tab: Billing for Job Placement

Click on the Down arrow and use the Drop Down list to select:	School Reporting Quarter - Q1SFY21, Q2SFY21, Q3SFY21 or Q4SFY21. After selection the OVR Reporting Quarter auto-fills. Note: Q1SFY22 (last quarter in the list) can only be used for the Employment Follow-up Report.
Demographic Data Entry	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.
CWTP Employment Specialist Signature & Date	Employment Specialist signs and dates to verify the completion of the Job Placement, the corresponding report, and accuracy of the billing statement.

Job Placement Report and Billing Statement Review and Submission to OVR

Primary CWTP Contact	Reviews then signs and dates to verify completion of Job Placement and accuracy of the contents of the Job Placement Report.
	Saves the Job Placement Report worksheet to PDF format. Names file by adding an underscore _ and JPR to the end of the file name.
	Example: 356789KentuckyTransition_JPR
	Reviews then signs and dates to verify the completion of the Job Placement, the corresponding report, and accuracy of the billing statement.

Transition Services File Directions

Primary CWTP Contact	Saves the Billing Statement worksheet to PDF format. Names file by adding an underscore _ and BSJPR or BS_JPR to the end of the file name.
	Example: 356789KentuckyTransition_BSJPR
	Example: 356789KentuckyTransition_BS_JPR
	Submits both PDF files to OVR (email or VR Counselor access to shared drive).

Job Placement Report and Billing Statement Due Date

	The Job Placement Report and billing statement are submitted to OVR upon completion and within the quarter authorized.
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Employment Follow-up Report Tab

Demographic Data Entry	Information populates from Student Info tab.
Name of Employer	Information populates from the Job Placement Report
Job Classification/Title	Information populates from the Job Placement Report
Job Duties	Information populates from the Job Placement Report
Date Hired	Information populates from the Job Placement Report
High School Exit Date	Information populates from the Job Placement Report
OVR Employed Status Date	Information populates from the Job Placement Report
Hourly Wage	Information populates from the Job Placement Report
Hours per Week	Information populates from the Job Placement Report
Health Insurance	Information populates from the Job Placement Report
Current Supervisor	Information populates from the Job Placement Report
Employer Phone	Information populates from the Job Placement Report
Click into or tab to each cell to enter:	Date Employment Specialist Follow-up Services End (60 days following the OVR Job Placement Date).
	Transportation information
	Current Schedule
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
CWTP Employment Specialist Signature & Date	Employment Specialist signs and dates to verify the completion of Employment Follow-up services and accuracy of the contents within the Employment Follow-up Report.

Billing Statement Tab: Billing for Employment Follow-up

Click on the Down arrow and use the Drop Down list to select:	School Reporting Quarter Q1SFY22 (last quarter in the list). This is the only quarter allowable for the Employment Follow-up Report. After selection the OVR Reporting Quarter auto-fills.
Demographic Data Entry	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.

Transition Services File Directions

CWTP Employment Specialist Signature & Date	Employment Specialist signs and dates to verify the completion of the Employment Follow-up services, Employment Follow-up Report and accuracy of the billing statement.
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Employment Follow-up Report and Billing Statement Review and Submission to OVR

Primary CWTP Contact	Reviews then signs and dates to verify completion of the Employment Follow-up services and accuracy of the contents of the Employment Follow-up Report.
	Saves the Employment Follow-up Report worksheet to PDF format. Names file by adding an underscore _ and EFR to the end of the file name.
	Example: 356789KentuckyTransition_EFR
	Reviews then signs and dates to verify the completion of the Employment Follow-up Report services, corresponding report, and accuracy of the billing statement.
	Saves the Billing Statement worksheet to PDF format. Names file by adding an underscore _ and BSEFR or BS_EFR to the end of the file name.
	Example: 356789KentuckyTransition_BSEFR
	Example: 356789KentuckyTransition_BS_EFR
	Submits both PDF files to OVR (email or VR Counselor access to shared drive)

Employment Follow-up Report and Billing Statement Due Date

	The 60 days of employment follow-up begin after the student exits high school. Therefore the Employment Follow-up Report and billing statement cannot be submitted until the 1st quarter of the next fiscal year. The Employment Follow-up Report and billing statement should be submitted upon completion of the services but no later than September 5th. The date of submission of the report is dependent on when the student exited school and the end of the 60-day timeline. Do not wait to submit the report and billing statement until September 5th if the 60 days of employment follow-up was completed in July or early August.
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