Case File Order

SECTION 1: FINANCIAL INFORMATION (Chronological)

* Authorization Request Forms
* Corrective Action Plan- Client
* Client Reimbursement Form/Receipts/Proof of Purchase Form
* Cost Estimates (modifications, equipment, etc.)
* Direct Deposit Enrollment/FOCUS Card Enrollment Form
* Invoices
* Service Authorization Copies (optional)
* OJE Timesheet
* OJT Timesheet
* WBLE Time Sheet

SECTION 2: BASIC AND CONTACT INFORMATION (Chronological)

* Action Planner
* Application
* BP/Benefits Services Referral Form
* DHHS Release of Information
* Handwritten Informational Notes
* Information Releases from other programs
* Next Steps
* Original photocopy of the front and back of the immigration document if a non-citizen
* Pre-ETS Consent and Information Release
* Release of Information Form and any updates
* Releases to Other Agencies
* Release Form for Video & Media
* SSA-3288 Consent for Release of Information/General
* SSA-3288 Consent for Release of Information/Earnings
* State Vehicle Waiver Form
* Waiver of Parent Signature Form
* WBLE Information Sheet
* Pre-ETS Referral/General VR Referral - Bottom Document

SECTION 3: ELIGIBILITY/MEDICAL (Chronological)

* Client Incident Report (Top Document)
* Audiology Calculating Tool
* BP/Benefits Orientation and Services Documents
* Community Work Assessment (all pertinent forms)
* Documentation Checklist for Adults
* Documentation Checklist for Youth (under age 24)
* Functional Capacity Checklist
* IEP, Multi-Disciplinary Team Report and/or Educational Psychological Report
* Impairment Checklist
* Med./Psych. Information
* Nebraska VR ABI Screen
* Physical Capacities Form
* Request for Medical Information Form
* Section 511 (all pertinent forms)
* Social Security verification documents/BPQY
* All copied information from a previous case record (Bottom Document)

SECTION 4: IPE DEVELOPMENT (***Pre-Plan***)

* IPE (Original and IPE Amendments forms) (Top Documents)
* VR Profile for Supported or Customized Employment
* Discovery Booklet Activities (Optional: Underneath IPE documents)
* Career Planning Preferences (in place of Discovery Booklet)
	+ ***\*Following Documents Chronological***
* AgrAbility Referral
* AgrAbility Assessment Report
* ATP-CPAP Facility Assessment Referral Form
* ATP Referral Form
* ATP Report
* ATP Service and Device Application
* Background Request
* Background Screen Information Release
* Background Screen Results
* Communication Assessment Form
* Consent for a Non-Paid Exploration and/or Assessment Placement
* Consent for a Paid On-the Job Evaluation Placement
* DHHS Registry Check
* Educational Budget Information and/or Budget Worksheet (Post Secondary)
* Vocational Evaluation Referral Form
* Evaluation Assessment Materials
* Evaluation Assessment Report
* Grade Transcripts (Obtained prior to IPE Approval)
* High School Grade Reports (Obtained prior to IPE Approval)
* Independent Living Referral
* Independent Living Assessment forms
* Independent Living Reports
* Informational Interviews
* I-9 Form and Information
* OJE Information Sheet
* OJE Letter Checklist
* OJE On-The-Job Report
* OOS Information and Referral Form to Other Programs
* Pre-ETS Job Exploration Referral
* Post-Secondary Training Justification
* Self-Employment Assessment & Referral
* Self-Employment Exploring Entrepreneurship Workshop Referral
* Self-Employment Discussion Questionnaire
* Self-Employment Business Plan
* Self-Employment Feasibility Referral
* Self-Employment Feasibility Report
* Supported Self-Employment Referral Form
* Summary of Performance
* W4 Employee’s Withholding Allowance Certificate
* WBLE Paperwork (all pertinent forms)
* Summary of Initial Meeting (Bottom Document)

SECTION 5: SERVICES AND PROGRESS REPORTS (***Post-Plan***)

* Weekly Job Search Record (Top Document)
* Job Search Agreement (Second Document)

            ***\*Following Documents Chronological***

* All Training Progress Reports
* Consent for a Non Paid Training Placement
* Consent for a Paid On-the-Job Training Placement
* Equipment Agreement Form
* High Cost Approval Request
* Job Facts Guide
* Job Seeking Skills Training Application
* Mediation Referral
* OJT Information Sheet
* OJT On-The-Job Report
* OJT Letter Checklist
* Placement Referral
* Placement Reports
* Résumé
* Referrals to Other Community Organizations
* Supported Employment Referral Form
* Supported Employment Milestones (all pertinent forms)
* Student Financial Aid Report (SFAR) or (SFAR-E)
* Work Opportunity Tax Credit (WOTC)

SECTION 6: CORRESPONDANCE

* Successful Outcome Letter, Office Director Letter, Termination Letter, Job Retention letter (OOS Exception) *Refusal to Participate* form, *Refusal of Pre-Employment Transition Services (While still in High School)* form.

            ***\*Following Documents Chronological***

* Appointment Reminder Post Card
* Client e-mails (To & From – Relating to progress or case decisions if printed)
* Eligibility/OOS Letter
* OJE/OJT Letters
* Other Letters
* Pleading and Court Orders
* Suicide Call
* Ticket Un-Assignment Form