

ELECTRONIC CASE FILE CATEGORIES/ATTACHMENT TYPES

<u>CATEGORY</u>	<u>ATTACHMENT TYPE</u>
Applied	Application* Work Verification Documents Next Steps Summary of Initial Meeting
Assessment	AgrAbility Assessment Report ATP Report CCIR Documents Communication Assessment Form Evaluation Assessment Materials Evaluation Assessment Report Informational Interviews Trial Work Experience
Benefits	Benefits Orientation Documents Benefits Services Reports Ticket to Work Documents
Correspondence	15-day letter Appointment Card Reminder Eligibility/OOS Letter Job Retention Letter Mail/Email Office Director Letter Other Letters Refusal of Pre-Employment Transition Services Refusal to Participate S&D Resource Letter (ATP) Section 511 Documentation Checklist Successful Outcome Letter Termination/Ineligibility Letter
Fiscal	Authorizations Request Forms Client Reimbursement Form/Receipts Corrective Action Plan Cost Estimates Equipment Agreement Form Invoices Proof of Purchase Form Signed Authorizations
Legal	Background Screen Results* Client Incident Report* Criminal Background Check Request DHHS Registry Check* Emancipated Minor Form* Letters of Guardianship* Pleading and Court Orders* Suicide Call Form*
Medical	Educational Psychological Report* Med/Psych Information* Multi-Disciplinary Team (MDT)* Physical Capacities Form* Previous Eligibility Information* Request for Medical Information Form
OJE/OJT/WBLE	Consent for a Paid/Non-Paid Form* Information Sheet Letters On the Job Reports Timesheets

<u>CATEGORY</u>	<u>ATTACHMENT TYPE</u>
Placement	Job Facts Guide Job Search Agreement Job Search Reports Job Seeking Skills Training Application Letters of Recommendation Résumé/Cover Letter Weekly Job Search Record Work Opportunity Tax Credit (WOTC)
Planning	Action Planner Amendments* Career Planning Preferences Discovery Booklet Activities IEP IPE* Planning Documents
Referrals	AgrAbility Referral ATP Referral BP/Benefits Services Referral Information and Referral Mediation Referral Placement Referral Pre-ETS Job Exploration Referral Pre-ETS Referral Self-Employment Referral Supported Employment Referral Vocational Evaluation Referral VR Referral
Releases	Background Screen Release of Information Information Releases from other programs Pre-ETS Consent and Information Release Release Form for Video and Media Releases to Other Agencies SSA-3288 Consent for Release of Information/General State Vehicle Waiver VR Release of Information
Self-Employment	Business Plan Discussion Questionnaire Feasibility Report Viability Report
Supported Employment	Reports VR Profile
Training (Academic)	Educational Budget Worksheet Post-Secondary Training Justification Registration/Grades* Student Financial Aid Report (SFAR) or (SFAR-E)* Transcript, completion certificate, diploma, degree

Attachment Types with a * can only be deleted by Office Directors.