



Case File Request for Information

I request the following information (check all that apply) from my electronic case file for the time period _____ to _____ OR _____ from date of application to present.

Client/Authorized Representative Signature

Date

Applied

- Application
- Immigration Documentation
- Next Steps
- Summary of Initial Meeting
- WIOA data*

Assessment

- Acquired Brain Injury Interview*
- AgrAbility Assessment Report
- ATP Report
- Communication Assessment Form
- CCIR Documents
- Eligibility Information*
- Evaluation Assessment Materials
- Evaluation Assessment Report
- Functionality Capacities*
- Informational Interviews
- Priority Determination*
- Trial Work Experience

Benefits

- Benefits Orientation Documents
- Benefits Services Reports
- Existing Benefits*
- Ticket to Work Documents

Correspondence

- 15-day letter
- Appointment Card Reminder
- Eligibility/OOS Letter
- Email/Mail
- Job Retention Letter
- Office Director Letter
- Other Letters
- Refusal to Participate Form
- Refusal of Pre-ET Services Form
- 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
- Equipment Recoupment*
- Invoices
- Proof of Purchase Form
- QuickPay*
- Signed Authorizations

Legal

- Background Screen Results
- Client Incident Report
- Criminal Background Check Req
- 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 Info Form

OJE/OJT/WBLE

- Consent for a Paid/Non-Paid Form
- Information Sheet
- Letters
- On the Job/WBLE Report
- Timesheets

Placement

- Employment Follow-Ups*
- Employment History*
- Job Facts Guide
- Job Search Agreement
- Job Seeking Skills Training App
- Job Search Reports
- Letters of Recommendation
- Résumé/Cover Letter
- Weekly Job Search Record
- Work Opportunity Tax Credit

Planning

- Action Planner
- Amendments
- Career Planning Preferences
- Discovery Booklet Activities
- Enrollments at IPE*
- Electronic workbook*
- IEP
- IPE
- Planning Documents

Referrals

- AgrAbility Referral
- ATP Referral
- BP/Benefits Services Referral
- Information and Referral
- Placement Referral
- Pre-ETS Job Exploration Referral
- Pre-ETS Referral
- Mediation Referral
- Self-Employment Referral
- Supported Employment Referral
- Vocational Evaluation Referral
- VR Referral

Releases

- Background Screen Release of Info
- Info Releases from other programs
- Pre-ETS Consent and Info Release
- Release Form for Video & Media
- Releases to Other Agencies
- SSA-3288 Request for Release of Info
- State Vehicle Waiver
- VR Release of Information

Self-Employment

- Business Plan
- Discussion Questionnaire
- Feasibility Report
- Viability Report

Supported Employment

- Reports
- VR Profile

Training (Academic)

- Credential Attainment*
- Educational Budget Worksheet
- Measurable Skill Gain*
- Post-Secondary Training Justification
- Registration/Grades
- Student Financial Aid Report
- Transcript, completion certificate, diploma, degree

Case Management

- Annual Reviews*
- Case Closure*
- Change VR Contact*
- Limit Access*
- Task notes*
- Terminate Case*
- Transfer Case*

Information noted with an asterisk () are not part of the Zip and Export file and must be provided separately.