

ALL TRIBE VR CASE FILING PROCEDURE

Section Entries are in Chronological Order

Side 1: The Plan

- A. IPE, IPE amendments, IPE extensions, annual reviews
- B. Initial and ongoing financial summaries (if completed)
- C. Statement of service responsibility (substance abuse form)

Side 2: The Story

- A. Application, proof of residency, proof of enrollment, case notes, certification of eligibility, and presumptive eligibility
- B. Correspondence: letters, emails, etc.
- C. Rationale for goal selection (form attached to IPE)
- D. Summary assessment (completed only if assessment is done)
- E. Eligibility extension form
- F. Closure outcome form
- G. Closure letter

Side 3: Training/Job Seeking

- A. Referral form to employment specialist
- B. Job plan from employment specialist
- C. OJT forms/contract
- D. Business plans
- E. Career exploration documentation
- F. Background check
- G. Professional licenses
- H. Resume
- I. PASS plans
- J. Financial aid & PELL forms
- K. College/Votech progress reports and grades
- L. VA, private rehab reports/documentation

Side 4: Diagnosis & Treatment

- A. Initial medical information (includes voc eval and psych evals)
- B. Medical/psychological consultant reviews/comments
- C. Future medical information
- D. Letters from professionals clarifying eligibility/diagnosis/treatment
- E. Child study team reports and IEP
- F. Functional capacity evals

Side 5: Administration

- A. Release of information forms and letters
- B. Loan agreement/assignment forms
- C. Supported employment sign-off, SE status change forms
- D. Ticket to work
- E. HIPPAA paperwork
- F. SSA information and letter
- G. Proof of insurance, driver's license
- H. Administrative review forms/decision
- I. Trust documents
- J. Benefits planning

Side 6: The Money

- A. Requisitions with copies of service request, quotes, check, and receipts
- B. Bids, estimates, and purchasing information (vendor name)