

FORMS LIST

R-479	_____	IVRS Referral Form (12/2011)
R-412	_____	Application for Services (04/2014)
R-2	_____	Preliminary Intake Form (12/2013)
R-3	_____	Health Assessment Questionnaire (10/2013)
I-9	_____	Employment Eligibility Verification (03/08/2013)
IPE-1	_____	Applicant's Rights and Responsibilities (9/2014)
IPE-2	_____	Employment Plan/Review/Amendment (4/2014)
IPE-3	_____	Closure Form (08/2013)
	_____	Case File Cover Sheet (Optional)
R-413	_____	Eligibility Face Sheet (12/2013)
	_____	Eligibility Face Sheet – Limitations (3/2014)
	_____	CTP Rubric (03/2010)
	_____	Doctor Statement of Diagnosis (10/2013)
	_____	No-Cost Services Form
283-1390	_____	Extension of Eligibility Release (02/2013)
283-1458	_____	Extension of Employment Plan Development Timeline (02/2013)
R-406	_____	Financial Inventory and Participation Worksheet (3/2014)
	_____	Post-Secondary Training Budget Worksheet
R-407	_____	Authority for Release and Exchange of Information (medical, psychological, or other) (12/2013)
R-407A	_____	Release/Exchange of Information between Agencies (02/2008)
R-450	_____	Official Authorization and Billing
	_____	Request for Exception to Policy (8/13)
	_____	Appointment Reminder Cards
R-555	_____	Statement of Understanding (publicity release) (10/2006)
	_____	Case Record Audit Checklist (05/2013)
	_____	TTW Timely Progress Review Guide
	_____	Dictation Log Sheet
100B	_____	Iowa Industrial Commissioner – Application – Rehabilitation Benefit (Original Notice and Petition)
	_____	Vehicle Modification Checklist (5/2014)
	_____	Home Modification Checklist (5/2014)

Computer Request: -- See II-I-1

_____ Personal Computer Purchase Review Guide

Benefits Planning:

_____ Release for BPQY

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Transition:

_____ Transition Vision Analysis

Iowa Self Employment:

- _____ ISE Checklist
- _____ Orientation Exploration – Is Small Business Right for You?
- _____ Can I really afford to do this?
- _____ Client Financial Implementation Form
- _____ Credit Report Instructions
- _____ Credit Report Mail-In Form
- _____ Documentation of Client Match Items
- _____ Income/Offset Disclosure Form
- _____ Personal Financial Statement
- _____ Personal Budget
- _____ Guide: What a Business Plan Should Include

Work Opportunity Tax Credit: (see II-J-1)

- IRS 8850 _____ WOTC Program Brochure
- IRS 8850 _____ Pre-Screening Notice and Certification Request
- ETA 9061 _____ Individual Characteristics Form
- ETA 9062 _____ Conditional Certification

Forms are available at: <http://www.doleta.gov/business/incentives/opptax/forms.cfm>

IVRS Employment:

#1 _____ Travel Expense Voucher

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ORDER OF CASE FILING

(from top down)

LEFT SIDE OF FILE:

Case Record Audit Sheet

RIGHT SIDE OF FILE:

1. Cover Sheet (Optional; Case History page from IRSS or Cover Sheet)
2. R-412 Application Information
3. R-2 Preliminary Intake Form
4. R-413 Face Sheet (attach CTP Rubric, if applicable)
5. 283-1390 Extension of Eligibility Release
6. R-413 Narrative Entries* (in chronological order top to bottom)
7. IPE Case file copies (in chronological order of development bottom to top) so that the latest IPE form is always the next item adjacent to the latest R-413 page.
8. R-556 Extension of Plan Development Release (with the IPE it relates to)

*R-413 Narrative Entries are only printed and placed in the case file if they were not copied into IRSS before the case file was closed.

Divider ... OTHER EVALUATIVE, PERFORMANCE & PLACEMENT MATERIALS:

1. Psychological reports including GATB, other interest and aptitude measures, and/or facility evaluations.
2. Transcripts, class schedules and grade reports (including GED scores and certifications)
3. Progress Reports
4. JSST, WOTC, Employer History reports, resumes, references, and other job placement-preparatory or readiness materials.
5. Job Readiness Analysis, Menu of Service reports and Supported Employment materials.
6. OJT Employee and OJT Trainee supporting materials.
7. I-9 Materials (kept at the bottom of this section)

Divider ... FINANCIAL PLANNING AND AUTHORIZATIONS:

(All items in this section are to be filed in the order received or completed, with the newest on top.)

1. No-Cost Services Worksheet (This form should always remain at the top of this section.)
2. R-450 Official Authorization and Billing Forms
3. Exception to Policy Forms

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4. R-406 Financial Inventory & Participation Worksheet
5. Budget Worksheet
6. Wage Verifications
7. Financial Aid Forms/Award Letters
8. Benefit Planning materials
9. Computer Purchase Forms
10. Information related to the Ticket to Work Program
11. SSDI/SSI Program Support Materials (SSA-1408, Verifications, etc.)

Divider ... SELF-EMPLOYMENT PROGRAM:

1. ISE Checklist
2. Orientation Exploration – Is Small Business Right for You?
3. Can I really afford to do this?
4. Client Financial Implementation Form
5. Credit Report Instructions
6. Credit Report Mail-In Form
7. Documentation of Client Match Items
8. Income/Offset Disclosure Form
9. Personal Financial Statement
10. Personal Budget
11. Guide: What a Business Plan Should Include

Divider ... CORRESPONDENCE:

1. All correspondence (newest material on top) (not elsewhere assigned a position)
2. Misc. materials that do not have an assigned position.
3. Documents related to guardianship.
4. Non-medical releases (parents, spouses, schools, etc.)

Divider ... MEDICALS:

1. Health Assessment Questionnaire (R-3). (This report should always remain at the top of this section.)
2. Any separate LD and/or TBI review done by DDS Consultant
3. Any report completed by a medical doctor
4. Doctor's Statement of Diagnosis
5. All other medical reports received, in chronological order with the most recent on top (except Social Security Packets)
6. R-407 Medical Releases

*CDs containing medical information are taped to the back cover of the case file. Releases should be stapled on top of the records received from the request.

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Divider ... OLD CASEFILE MATERIALS:

Closed case file placed under this divider or existence is noted if file is too bulky.

(Any medical records used for eligibility purposes in the current case should be moved forward to the new Medicals section.)

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Iowa
Vocational
Rehabilitation
Services