

MVR CASE FILING PROCEDURE
Section Entries Are In Chronological Order

SIDE 1: 'THE PLAN'

- A. IPE Part I, IPE Amendments and IPE Extensions, Annual Reviews, PES Plan, Goal Assessment Plan, MVR Consumer Understanding (Form 3A)
- B. Initial & Ongoing Financial Summaries
- C. Statement of Service Responsibility (Substance Abuse Agreement)

SIDE 2: 'THE STORY'

- A. Application, Journal Notes, Certification of Eligibility, Presumptive Eligibility
- B. Correspondence, Letters, E-mails & Other
- C. Dated Case Entries (initial & ongoing)
- D. Rationale for Goal Selection
- E. Disability Level—Order of Selection & Disability Classification
- F. Summary Assessment
- G. Extension for Eligibility form
- H. MVR Closure Outcome Form
- I. Closure Letter

SIDE 3: 'TRAINING / JOB SEEKING'

- A. Community Rehabilitation Program Reports and Updates (activity logs)
- B. Financial Aid & Pell Forms & Information
- C. College or Vo-Tech Progress Reports/Grades
- D. VA, Private Rehabilitation and other rehabilitation reports (DWC, etc.)
- E. Hiring Preference Certification, Consumer verification letters, Schedule A hiring forms
- F. OJT documents
- G. Referral forms
- H. Business Plan
- I. Career Exploration documentation
- J. Employer Tax Credit
- K. Background Check
- L. Professional Licenses
- M. Resume
- N. Subsequent Injury form
- O. PASS Plans

SIDE 4: 'DIAGNOSIS AND TREATMENT'

- A. Initial Medical Information (includes vocational & psychological evaluations)
- B. Medical/Psychological Consultant Reviews/Comments
- C. Future Medical Information
- D. Letters from professionals clarifying eligibility/diagnoses/treatment
- E. Child Study Team reports and IEP
- F. Functional Capacity Evaluation

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. HIPAA paperwork, MVR Privacy Policy
- F. SSA Information and Letter
- G. VR 1050 form (most recent one remains on top)
- H. Proof of Insurance/driver's license, birth certificate
- I. Administrative Review
- J. Trust documents
- K. Benefits Planning

SIDE 6: 'THE MONEY'

- A. VR1 Worksheets, Authorizations/Purchase Orders & related paperwork
- B. Bids, Estimates, Purchasing Information
- C. Receiving Reports
- D. Statement of Receipt and Satisfaction