# PROVIDER REPORT TEMPLATE INSTRUCTIONS

These instructions are to provide additional information about how providers should use the template forms. The instructions are very basic, as different people have differing abilities and knowledge of Word.

VR has provided report templates for most recurring standardized reports. However, there are still other reports that providers use on a less frequent basis. Templates were not developed for these activities such as: placement report, job task analysis, etc. Providers may continue to use their current forms until such time as VR creates other report templates.

VR made adjustment to the report templates so that they can be used as an invoice as well as report. The Invoice section is optional and Providers may continue to use the 'VR Original Authorization Billing & Invoice' (RSC-0025) or their own letterhead billing invoice as long as it contains the required information.

There are two versions of the report templates, Word 2010 and Word 1997-2003. The Word 2010 format has additional features such as auto totaling columns and placing the information into the respective field of the invoice (Macros must be enabled for calculations and accessibility features in the 2010 version). The Word 1997-2003 version does not support macros. Both versions have Alt-Text and F1 Help functions. (F1 Help provides a brief description of what is required in the field; this document providers more thorough guidance.)

Both versions of the form are protected as 'Filling in Forms,' however they are not locked with a password. Providers may stop protection from the 'Review' tab and add additional data fields to the bottom of the form to address their needs. Providers should not change the original fields without permission. The most current version of the templates are indicated by the most recent date in its name '**v(date)**.'

If you have questions about the report templates please direct them to crpvendor@rsc.ohio.gov. VR will be reviewing the templates and instructions periodically in the future and will make adjustments as necessary. Thank you.

## General Instructions

- You may press "F1" in most of the form fields on the Template for more information on what should be included in the field.
- (Word 2010 Version ONLY) Template will total the Units of Service (UOS) Billed, Group Units of Service Billed (GUOS), Report Writing, and Mileage from the tables and place the information into the invoice. In order for the calculations to function properly you must have macros enables and use the 'Tab' key or arrows to maneuver through the fields. Clicking will the mouse will not trigger the macro to run

- Providers should indicate where the service takes place in the "Comments" section next to the date/description of services in order for VR staff to gauge mileage usage.

Table 1: Service Category & Template #

| SERVICES | TEMPLATE | LAST UPDATED |
|---|---|---|
| **ADL (Self) Training (Rehabilitation Teaching)** | **3** | 11/01/12 |
| **Benefits Analysis (Consultation)** | **3** | 11/01/12 |
| **Benefits Analysis (Initial Evaluation)** | 4 | 11/01/12 |
| **Career Exploration** | 5 | 11/01/12 |
| **Community Based Assessment** | 2 | 11/01/12 |
| **Customized Employment (Discovery)** | **DSR** | 11/01/12 |
| **Job Coaching** | 2 | 11/01/12 |
| **Job Development (UOS, Performance Based, & Customized Employment)** | 1 | 11/01/12 |
| **Job Readiness Training** | 2 | 11/01/12 |
| **Job Retention (UOS, Performance Based, & Customized Employment)** | 1 | 11/01/12 |
| **Job Seeking Skills Training** | **3** | 11/01/12 |
| **Low Vision Services** | **3** | 11/01/12 |
| **Orientation & Mobility** | **3** | 11/01/12 |
| **Personal Adjustment** | **3** | 11/01/12 |
| **Rehabilitation Technology** | **3** | 11/01/12 |
| **Summer Youth** | 2 | 11/01/12 |
| **Travel Training** | **3** | 11/01/12 |
| **Vocational Testing** | 5 | 11/01/12 |
| **Work Adjustment** | 2 | 11/01/12 |

Table 2: Common Form Elements: Contact Type

| CODE | DEFINITION |
|---|---|
| **EM** | Email Message |
| **FFC** | Face-Face Contact |
| **LTR** | Letter |
| **MSG** | Left Message |
| **RSH** | Research |
| **STF** | Staffing |
| **TC** | Telephone Contact |
| **TXT** | Text Message |

| | |
|---|---|
| **VC** | Video Call/Conference |

# Template 1

Shortcut Keys (Macros must be enabled. Word 2010 version only.)
Alt+1 - Takes you to Invoice Section
Alt+2 - Takes you to first date field of Billing Section.
Alt+3 - Takes you to Monthly Summary.
Alt+4 - Takes you to first date field of Contacts Section

## Monthly Summary: Section2

# of contacts Provider had with Consumer?

- This is the total # of contacts, whether in-person or through other means, that the Provider had with the Consumer during the reporting period.

Employment Goal?

- This should be taken from Individual Plan for Employment (IPE) or from the Referral to Facility. Providers and Consumers may not change the employment goal without prior written approval from VR staff. Changes in the vocational goal may require an Amendment to the IPE.

# of Employer Contacts Staff made?

- This should reflect the number of Employer contacts that Staff initiated. Do not include contacts that the Consumer has initiated. Do not include follow up contacts made by the Job Developer after the Consumer.

# of Employer Contacts Consumer made?

- This should reflect Employer contacts that the Consumer initiated. Do not include contacts if Provider initiated the Employer contact.

# of applications (resumes) submitted to Employers?

- Includes applications and resumes completed and submitted by both the Provider and/or Consumer.

# of interviews?

- Includes interviews that the Provider and Consumer participated in during the reporting period, either on their own or together.

Summary of Consumers input and participation in the job search?

- This should address how the Consumer feels their job search is progressing; any positive or negative concerns; etc. It also should include Provider’s assessment of the effort that the Consumer is putting forth to look for work.

Other impediments or concerns about progress?

- Provider and Consumer should include any disability and non-disability issues that might impede the job search.  Issues could include exacerbation of disability, family issues, legal issues, transportation issues, economic issues, etc.

Summary of next month's plan for services?

- Provider and Consumer should identify specific and measurable outcomes that should take place during the next month.  These are estimated goals, such as: apply for 10 jobs, send out 5 resumes, get 2 interviews, identify specific Employers to contact, etc.

Contacts Table

- You will enter specific employer contacts in this section.  The time associated with these activities should be recorded in the Invoice Table.  You may have more than one employer contact on a date.  Each employer contact should have its own line.

Employer Name & Address

- Provider should include names and address (street & city) of potential Employers contacted on behalf of Consumer.

Hiring?

- Check this box if the Employer is currently hiring or expects to be hiring within the next 30 calendar days.

| ACTIVITY CODES | DEFINITION |
|---|---|
| **APP** | Submitted a paper application with an Employer on behalf of Consumer. |
| **EAP** | Submitted an electronic application on behalf of Consumer. |
| **INT** | Scheduled or participated in an interview with Consumer |
| **OMJ** | Employer listing from Ohio Means Jobs/One Stop system |
| **ONS** | Conducted an online job search on behalf of Consumer |
| **RES** | Submitted a resume on behalf of a Consumer |

Follow Up?

- Check this box if this is a follow up contact to an Employer previously visited on behalf of the Consumer.

Comments?

- The comments should be concise and should answer the following questions:
    1. Who did you speak with?  What is their position?
    2. What did you find out?
    3. What action did you take based upon the information?
    4. What is the plan to follow up

# Template 2

Shortcut Keys (Macros must be enabled. Word 2010 version only.)

Alt+1 - Takes you to Invoice Section

Alt+2 - Takes you to first date field of Billing Section.

Alt+3 - Takes you to Job Tasks.

Alt+4 - Takes you to first date field of outcome section.

Invoice Section (Table 2)

| CONSUMER: | | | | | | MONTH/YEAR: | AUTHORIZATION: |
|---|---|---|---|---|---|---|---|
| DATE | UNITS OF SERVICE (INDIVIDUAL) | UNITS OF SERVICE (GROUP) | REPORT WRITING | MILEAGE | TYPE OF CONTACT | **Comments** | |

- Comments should be used to document activities that do not involve direct service with the Consumer on the job site, i.e. to document a Staffing, telephone calls, and appointments with Consumer outside the job site, etc. Comments should reflect the nature of the contact and include information to address:
  1. Who the contact was with?
  2. What was discussed?
  3. What was the course of action decided upon?

- This section should also be used to document the time spent during coaching (instruction). You will do not fill out 'Comments' for coaching activities you will enter that information in the last table with the behavioral and performance based information. You should enter Job Coaching in the 'Comments' section to let the VR staff know documentation is below.

Job Task (Table 3)

- Summary should include brief description of task and frequency of task. Similar job tasks can be grouped together. This is not intended to replace a job task analysis that is more comprehensive part of job coaching.

Employer Expectations

- Describe the minimum (benchmarks) quality and quantity standards established by the Employer

Initial Performance Level

- Describe the Consumer's baseline performance of job tasks that will be used to benchmark training and progress

Hygiene

Inter-Personal

Self-Direction

Timeliness

Work Ethic

Job Tasks 1 – 10

- You will use a numeric rating scale of 0 to 5 to score the Consumer's behavioral (first five) and performance (job tasks 1 – 10) indicators. The rating scale is dependent on the Employer's minimum standards (benchmarks).
  - 0 - Consumer is unable to meet Employers expectations even with supports
  - 1 - Consumer meets Employers expectations 20% of the time
  - 2 - Consumer meets Employers expectations 40% of the time
  - 3 - Consumer meets Employers expectations 60% of the time
  - 4 - Consumer meets Employers expectations 80% of the time
  - 5 - Consumer meets Employers expectations 100% of the time

Comments

- Should provide a narrative explanation of behavioral and performance based indicators. Items rated 3 or below must be addressed as part of the narrative. Narrative information should be included on any areas that have not demonstrated improvement for at least two weeks.

  Comments should also include a brief summary of interventions the Job Coach has or plans to use to address issues.

# Template 3

Shortcut Keys (Macros must be enabled. Word 2010 version only.)

Alt+1 - Takes you to Invoice Section
Alt+2 - Takes you to Service Goals Section
Alt+3 - Takes you to Current Functioning Level Section
Alt+4 - Takes you to Objective 1in Objectives Section
Alt+5 - Takes you to first date field in Outcomes Section
Alt+6 - Takes you to Summary Section
Alt+7 - Takes you to Comments Section
Alt+O - Lists currently defined objectives.

Summary of Initial Functioning

- This field should provide a description of the person's functioning level prior to interventions to create a baseline and benchmarking the service.

Objective

- Provide a brief description of the goal of the service, for example: to help the individual navigate independently in the workplace; to improve physical accessibility to the workplace, etc.

Summary of Plan of Instruction/Service

- Provide a brief plan of what activities or description of service that will be used to meet the objective. Plan should be measurable.

Summary & Outcomes

- This field should include a summary of the services that were provided and the outcome during a particular session or day.

# Template 4

Summary of Consumer's Plan & Goals

- Summary of what the individual wants to learn as part of the service. What type of employment that the person wants to go into, i.e. traditional employment, self-employment, etc. and how that will impact benefits.

Summary of Interview

- Summary of information collected from Consumer and how that will impact benefits.

Benefits Consumer Reported

- List the benefits that Consumer reported receiving during their interview.

Benefits Verification

- Benefits should be verified with source. Social Security benefits must be verified and a copy of the Benefits Planning Query (BPQY) must be attached to the report. If there is no specific benefit amount then leave that field blank.

Work & Medical Insurance

- This section should address issues with medical coverage and how it may be impacted by returning to work. Medicaid Buy-In for People with Disabilities should be addressed specifically.

Work Incentives

- Provider should list potential Work Incentives that may be available to the individual and a summary of how to use them, such as: is there a specific form that needs to be completed, whom to notify to use an incentive, etc.

Other Concerns/Issues

- Note factors that may require additional information or services. Providers should also include recommendations on how the issues can be corrected. For example if the Benefits Planning Query (BPQY) is inaccurate it should be noted here with a recommendation on what would be needed to correct the information. If VR staff wants the provider to address additional issues/concerns then a separate authorization can be issued.

# Template 5

Summary & Outcomes

- Provide a description of vocational activities.  This should include contacts with the VR Staff, Consumer, and Employers (for Career Exploration).

Consumer History

- Provide summary of areas of Consumer's history that may impact the job search: limitations, legal history, substance abuse, previous employment, education, etc.

Summary of Current/Projected Functioning

- Discuss Consumer's current functioning in light of their reported and projected functioning with VR services.

Tests Administered

- List the tests that were administered as part of the service.

Vocational Goal

- This section should list the employment goals as identified through vocational testing and/or career exploration.

Justification of Vocational Goal

- The section should provide an explanation of why the identified vocational goals are feasible, specific emphasis should be placed on interests, abilities, and local labor market.