Case File Set Up

Customer File Format (note – different offices keep the PIF on different sides – the majority is on the left, however I have it listed below as either because of the differences)

Left hand side from bottom up in chronological order. Items with a ♦ should be scanned as an attachment to the file	Right hand side from bottom up in chronological order. Items with a ♦ should be scanned as an attachment to the file
1) Personal Information Form ♦ 2) Medical, psychiatric, and/or psychological information♦ 3) Certification of Eligibility (prior to 8/20/15 a printed signed copy in file) Electronic in AWARE post 8/20/15 **Filed Chronologically --** 4) Action Plans 5) ♦Financial Needs Assessment or Financial Aid Transmittal Form ♦ 6) Individualized Plan for Employment (IPE) 7) Any Amendments to the IPE and/or Annual Reviews/Progress Appraisals (other reviews) 8) Case notes (kept electronically -- no longer required in paper file) 9) Closure Form (VR9C) ♦	1) Referral Form 2) Personal Information Form♦ 3) Application for VR Services ♦ 4) Release of Information form(s) **Filed Chronologically --** 5) Correspondence (counselor copies and letters received that do not contain medical/psychiatric or psychological information 6) Vocational evaluations; CRP reports♦; transcripts ♦; miscellaneous reports 7) Employment Verification documentation ♦ 8) Case File checklist (on top of right hand side of file)