

## Vendor Supporting Documentation Reference Guide

The following document provides guidance on when and where to submit supporting documentation for VR services claims.

### Two Billing Protocols:

1. All Employment Services Supporting Documentation will be e-mailed to VR Office General e-mail box
  - VR Office General E-mail Address Information: [VR Directory](#)
2. Supporting Documentation for all other services will be attached to the claim in VR-CPS

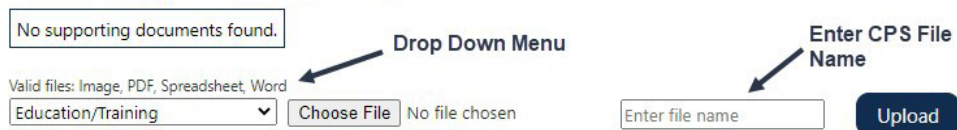
#### When to Submit Documentation

- Vendor claims for **products** that require supporting documentation in the “Receipt of Goods” category **for purchases of \$50 and more**. The necessary documentation for each authorization type is listed in the table below.
- Vendor claims for **products** that require invoices and they should be submitted in the **Invoice/EOB** category.
- Do not submit documentation with claims for facility transportation.

#### Where to Submit Documentation

Upload documentation to the “Supporting Documentation” section at the bottom of the Claim Information screen in VR-CPS as indicated in the screenshot below.

#### Supporting Documentation



No supporting documents found.

Drop Down Menu

Valid files: Image, PDF, Spreadsheet, Word

Education/Training

Choose File No file chosen

Enter CPS File Name

Enter file name

Upload

#### Additional Notes on Submitting Documentation

- Only upload supporting documentation for the participant for whom you are filing a claim.
- Before you upload the document, save the file with a name that clearly identifies what the document is including the name and dates of service.
- Complete the “VR-CPS file name” field in VR-CPS with a description of the document as outlined in the table below.
- Use the ‘claim items notes’ to submit additional information about the claim.

The table below outlines required documentation, appropriate category from the drop-down menu, and naming convention for each authorization type.

Authorization Type	Required Documentation in VR-CPS	Category to Select in Drop Down Menu	Example of Document Name	Example of VR-CPS File Name
<b>College Books</b> - Authorization to bookstore for college books.	<ul style="list-style-type: none"> <li>Receipts: Bookstores must upload a <b>copy of receipts</b>, with VR-CPS Claim</li> </ul>	Use: <b>Receipt of Goods</b>	<i>Book receipt August 2022</i>	<i>Books 2022</i>
<b>College tuition, fees, room, and board</b> (start date of authorization is the Start date of the term; end date the last drop/add date. Claim submitted after last drop/add date.	<ul style="list-style-type: none"> <li>No documentation needed in VR-CPS</li> </ul>	NA	NA	NA
<b>Vocational Training</b> (OJT, Cosmetology, other Occupational Training)	<ul style="list-style-type: none"> <li><b>Grades, Progress Notes, Attendance, and Certifications of Completion as deemed necessary</b></li> </ul>	Use: <b>Education and Training</b>	<i>Grades Feb 2022 Progress Notes Feb 2022, Attendance Report Feb 2022</i>	<i>Grades Feb 2022 Progress Notes Feb 2022, Attendance Report Feb 2022</i>
<b>Durable Medical Good</b> (Examples: wheelchair, scooter, prosthetic, etc.)	<ul style="list-style-type: none"> <li><b>ROG</b> (Preferred: vendor has the Participant sign the <b>ROG</b> and uploads in VR-CPS. Alternatively, the vendor can upload document with participant signature showing Participant received the item.)</li> <li><b>Explanation of Benefits (EOB)</b> if there is applicable insurance</li> <li><b>Invoice</b></li> </ul>	Use: <b>Receipt of Goods</b> for ROG or Signed Delivery Ticket Use: <b>Invoice/EOB</b> for Invoice and Insurance information.	<i>ROG-Wheelchair ROG-Scooter</i>	<i>ROG-Wheelchair ROG-Scooter</i>
<b>Audio/Oto Evaluation</b>	<ul style="list-style-type: none"> <li><b>Audio/Oto Reports</b></li> </ul>	Use: <b>Medical/Psychological Records</b>	<i>Audiological Exam- 2/5/2022</i>	<i>Audiological Exam- 2/5/2022</i>
<b>Authorization to Dispense Hearing Aids</b>	<ul style="list-style-type: none"> <li><b>ROG and</b></li> <li><b>One</b> of the following items: <b>Aided Audiogram, or Real Ear Measurement.</b></li> </ul>	Use: Receipt of Goods <b>Medical/Psychological Records</b>	<i>ROG</i>	<i>ROG 5/1/22 Aided Audiogram - 5/1/22</i>
<b>Interpreter Services</b>	<ul style="list-style-type: none"> <li><i>None</i></li> </ul>	NA	NA	NA

Authorization Type	Required Documentation in VR-CPS	Category to Select in Drop Down Menu	Example of Document Name	Example of VR-CPS File Name
Reimbursing Participant for Goods	<ul style="list-style-type: none"> <li>Receipts (exception - no receipt required for board and per diem)</li> </ul>	Use: <b>Invoice/EOB</b> for receipts <b>Use: Receipt of Goods</b> for Reimbursement Statement	<i>Books Fall 2022</i>	<i>Books Fall 2022</i>
Reimbursing Participant for Mileage	<ul style="list-style-type: none"> <li><b>Reimbursement Statement</b> with dates of travel</li> </ul>	Use: <b>Invoice/EOB</b>	<i>Mileage expenses Feb 2022</i>	<i>Mileage expenses Feb 2022</i>
Reimbursing Participant for Childcare or Tutoring	<ul style="list-style-type: none"> <li>Receipts</li> </ul>	Use: <b>Invoice/EOB</b>	<i>Childcare Feb 2022</i> <i>Tutoring Feb 2022</i>	<i>Childcare Feb 2022</i> <i>Tutoring Feb 2022</i>
Paying a Tutor/school for Services	<ul style="list-style-type: none"> <li><b>Support Services Statement</b> or</li> <li><b>Invoice</b></li> </ul>	Use: <b>Invoice/EOB</b>	<i>Tutoring Feb 2022</i>	<i>Tutoring Feb 2022</i>
Paying a Childcare Provider	<ul style="list-style-type: none"> <li><b>Support Services Statement</b> OR</li> <li><b>Invoice</b></li> </ul>	Use: <b>Invoice/EOB</b>	<i>Childcare Feb 2022</i>	<i>Childcare Feb 2022</i>
Facility Transportation (travel provided in conjunction with another service such as evaluation, training or employment services).	<ul style="list-style-type: none"> <li><b>Do not submit documentation with the claim</b></li> </ul>			
Facility Transportation (taxicab, public transportation)	<ul style="list-style-type: none"> <li><b>No documentation is required.</b></li> </ul>	Use: Invoice/EOB (if you wish to send an invoice)		

Authorization Type	Required Documentation in VR-CPS	Category to Select in Drop Down Menu	Example of Document Name	Example of VR-CPS File Name
<b>Psychological, Neurological, Medical, Behavioral Evaluation or Services</b>	<ul style="list-style-type: none"> <li>• <b>Service Report</b> (evaluation, summary of service, progress notes)</li> </ul>	Use: <b>Medical/Psychological Records</b>	<i>Psych Eval Report Feb 2022</i>	<i>Psych Eval Report – Dr. Smith - Feb 2022</i>
<b>AT Evaluation and Services</b>	<ul style="list-style-type: none"> <li>• <b>Service Report</b> (evaluation, summary of services, progress notes)</li> </ul>	Use: <b>Rehab/Assistive Technology</b>	<i>AT Eval – 2022 Training Report Feb 2022</i>	<i>AT Eval 2.15.22 Training Report Feb 2022</i>
<b>Assistive Tech or other product</b> being mailed to Evaluator or Participant (delivered to evaluator so they can deliver and set up for the participant)	<ul style="list-style-type: none"> <li>• <b>Invoice (itemized showing products being billed)</b></li> </ul> <p><b>AND</b></p> <ul style="list-style-type: none"> <li>• <b>Receipt of Goods (ROG)</b> <ul style="list-style-type: none"> <li>○ If product is sent to Evaluator, they have Participant sign <b>ROG</b> at install and send to Area VR Office email and vendor</li> <li><b>OR</b></li> <li>○ If sent directly to participant, vendor should upload <b>delivery tracking sheet</b> verifying product has been delivered.</li> </ul> </li> </ul>	Use: <b>Invoice/EOB</b> for the invoice Use: <b>Receipt of Goods</b> for ROG or delivery Ticket	Product Description  <i>Walker - Feb 2022</i>  <i>Computer Software Feb 2022</i>	Product Description  <i>Walker - Feb 2022</i>  <i>Computer Software Feb 2022</i>
<b>Other Goods</b> (glasses, equipment, uniform, etc.) picked up by Participant.	<ul style="list-style-type: none"> <li>• <b>Invoice/Receipt</b></li> </ul> <p><b>AND</b></p> <ul style="list-style-type: none"> <li>• <b>ROG</b> (unless the product is less than \$50.00) <ul style="list-style-type: none"> <li>○ Preferred: vendor has participant sign <b>ROG</b> when participant picks up item/other goods.</li> </ul> </li> <li>• Alternatively, the vendor uploads document verifying participant has received the product (OT/PT report, medical report, other)</li> </ul>	Use: <b>Invoice/EOB</b> for Invoice Use: <b>Receipt of Goods</b> for ROG	<i>Glasses Feb 2022</i> <i>Uniform Jan 2022</i>	<i>Glasses Feb 2022</i> <i>Uniform Jan 2022</i>

Authorization Type	Required Documentation in VR-CPS	Category to Select in Drop Down Menu	Example of Document Name	Example of VR-CPS File Name
<b>Small Business/Self Employment Evaluation and Consultation</b>	<ul style="list-style-type: none"> <li>• <b>Service Report</b> (evaluation, business plan development, summary of consultation services)</li> </ul>	Use: <b>Small Business Enterprise</b>	<i>SBC Feb 2022 Business plan Jan 2022</i>	<i>SBC Feb 2022 Business plan Jan 2022</i>
<b>Small Business Products</b> (tools & equipment, licenses, stocks & supplies, etc.)	<ul style="list-style-type: none"> <li>• <b>Invoice (itemized showing products being billed)</b></li> <li>• <b>Receipt of Goods (ROG)</b> <ul style="list-style-type: none"> <li>○ Participant sign <b>ROG</b> at install and vendor sends to Area VR Office email OR</li> <li>○ Vendors who mail products directly to participant should upload <b>tracking sheet/delivery ticket</b> verifying product has been delivered.</li> </ul> </li> </ul> <p><b>AND</b></p>	Use: <b>Receipt of Goods</b> for ROG or delivery Ticket Use: <b>Invoice/EOB</b> for the invoice	<i>Product description Stocks and Supplies – 2.2022 Computer and Printer 3.2022 Microsoft License</i>	<i>Product description Stocks and Supplies – 2.2022 Computer and Printer 3.2022 Microsoft License</i>
<b>Small Business Services</b> (such as accounting, marketing-website design, etc.)	<ul style="list-style-type: none"> <li>• <b>Invoice (itemized showing services being billed)</b></li> </ul>	Use: <b>Invoice/EOB</b>	<i>SB services Accounting Jan – March 2022 Website Design Feb 2022</i>	<i>SB services Accounting Jan – March 2022 Website Design Feb 2022</i>
<b>Driver Evaluation or Training</b>	<ul style="list-style-type: none"> <li>• <b>Evaluation, Training Report, or summary of progress.</b></li> <li>• Upload report with VR-CPS claim OR</li> <li>• Send report to local VR office general email prior to submitting claim in VR-CPS.</li> </ul>	Use: <b>Rehab/Assistive Technology</b> for report Use: <b>Invoice/EOB</b> - If you want to upload an invoice	<i>Driver Eval Feb 2022 Driver Training 12. 2022</i>	<i>Driver Eval Feb 2022 Driver Training 12. 2022</i>
<b>Vehicle Modification</b>	<ul style="list-style-type: none"> <li>• <b>Post-VM Func. &amp; Mech. Inspection</b> Signed by the Mech. Inspector and Driver Evaluator</li> <li>• <b>Invoice (itemized showing products being billed)</b></li> </ul>	Use: <b>Receipt of Goods</b> for Post Modification Inspection Use: <b>Invoice/EOB</b> for invoice	<i>VM post mod Inspection VM Invoice</i>	<i>VM post mod Inspection VM Invoice</i>
<b>Vehicle Modification Inspection</b> (either functional or mechanical)	<ul style="list-style-type: none"> <li>• <b>Full Inspection Report</b></li> <li>• Completed by mechanical inspector or CDRS. Vendor can upload report with VR-CPS claim or send report to local VR office general email prior to submitting claim in VR-CPS.</li> </ul>	Use: <b>Rehab/Assistive Technology</b>	<i>VM Inspection Report – 2.2022 Functional Inspection 2.2022</i>	<i>VM Inspection Report – 2.2022 Functional Inspection 2.2022</i>



Authorization Type	Required Documentation in VR-CPS	Category to Select in Drop Down Menu	Example of Document Name	Example of VR-CPS File Name
<b>Home Modification Evaluation/Consultation/ Inspection</b>	<ul style="list-style-type: none"> <li><b>HM Evaluation, Full HM Inspection Report, Price quotes gathered from contractors, Full Specs that have been developed</b> as applicable</li> </ul> <p>Vendor can upload report with VR-CPS claim or send report to local VR office general email prior to submitting claim in VR-CPS.</p>	Use: <b>Rehab/Assistive Technology</b>	<p><i>HM Eval Report</i> <i>HM Inspection Report 2.2022</i></p> <p><i>HM Quote – (contractor name)</i> <i>Transfer System Quote – (contractor name)</i></p>	<p><i>HM Eval Report</i> <i>HM Inspection Report 2.2022</i></p> <p><i>HM Quote – (contractor name)</i> <i>Transfer System Quote – (contractor name)</i></p>
<b>Home Modification - Materials</b>	<ul style="list-style-type: none"> <li><b>ROG</b> for Materials (Contractor has Participant sign ROG after Materials are on site <i>or</i> Evaluator has ROG signed, email to local VR office general email)</li> <li>VR Self-Certification of BABAA Compliance letter</li> <li><b>Copy of Permit or verification no permit required for HM costing more than \$10,000.</b></li> <li>(If materials are claimed after final inspection, only the final inspection is required)</li> </ul>	<p>Use: <b>Receipt of Goods for ROG</b></p> <p>Use: <b>Invoice/EOB</b> for invoice and permit requirement verification.</p>	<p><i>HM Materials ROG HM Materials Invoice</i></p>	<p><i>HM Materials ROG HM Materials Invoice</i></p>
<b>Home Modification Services – Labor</b>	<ul style="list-style-type: none"> <li><b>Home Modification Inspection</b> form signed by HM Project Manager and given to Contractor to upload with VR-CPS claim for labor.</li> <li>If billing for whole project after inspection, a separate ROG is not required.</li> </ul>	Use: <b>Receipt of Goods</b> for the HM Inspection form	<i>HM Inspection</i>	<i>HM Inspection</i>

Authorization Type	Required Documentation in VR-CPS	Category to Select in Drop Down Menu	Example of Document Name	Example of VR-CPS File Name
<b>Farm Modification Evaluation and Consultation services</b>	<ul style="list-style-type: none"> <li>• <b>Farm Assessment Report or Service Report</b></li> </ul>	Use: <b>Rehab/Assistive Technology</b>	<i>Farm Assessment Feb 2022</i>	<i>Farm Assessment Feb 2022</i>
<b>Farm Modifications</b> Involving only purchase of equipment	<ul style="list-style-type: none"> <li>• <b>ROG (or signed delivery ticket)</b></li> <li>and</li> <li>• <b>Invoice (itemized showing products being billed)</b></li> </ul>	Use: <b>Receipt of Goods</b> for ROG or Signed Delivery Ticket Use: <b>Invoice/EOB</b> for the invoice	<i>Farm Mod Invoice</i> <i>Farm Mod signed delivery ticket</i>	<i>Farm Mod Invoice</i> <i>Farm Mod signed delivery ticket</i>
<b>Farm Modification Services</b> involving installation of equipment or structural modifications	<ul style="list-style-type: none"> <li>• <b>Invoice</b></li> <li>and</li> <li>• <b>Farm Modification Inspection</b> (inspection may be required, based on the VRC and recommendations of FM evaluator)</li> </ul>	Use: <b>Invoice/EOB</b> for the invoice and inspection	<i>FM Inspection – 2.15.22</i>	<i>FM Inspection – 2.15.22</i>
<b>Equipment that can have a State License Plate</b> (Utility Vehicle, Trailers, other farm equipment)	<ul style="list-style-type: none"> <li>• <b>ROG</b></li> <li>• <b>Invoice (itemized showing products being billed)</b></li> <li>• <b>(Certificate of Origin should be mailed via USPS to VR Office)</b></li> </ul>	Use: <b>Receipt of Goods</b> for ROG or signed delivery ticket Use: <b>Invoice/EOB</b> for the invoice	<i>Invoice Pilot Lift</i>	<i>Invoice Pilot Lift</i>



**All Employment Services should submit supporting documentation to local VR General E-mail.**  
**Please see ES Manual for further billing details located on VRS.IN.GOV website.**

Authorization Type	Required Documentation	Process	Submission Location	Example of Document Name
<b>Discovery</b>	<ul style="list-style-type: none"> <li>Participants who started prior to November 2023 Old Monthly Progress Summary or New Discovery Profile</li> <li>Participants who started after November 2023 Discovery Profile</li> </ul>	<ul style="list-style-type: none"> <li>Email Discovery Profile to office general email box.</li> <li>Discovery Profiles are due by the 10<sup>th</sup> of the following month, if not received by the 10<sup>th</sup> of the month, VR will not pay the claim until it is received. Note: If participant starts a job while in Discovery, hourly discovery or work experience could be paid while DP &amp; JDPP is being finalized and has been submitted.</li> </ul>	VR Area E-mail	<i>SmiJoh MPS Jan 2024</i> <i>SmiJoh DP Jan 2024</i>
<b>Job Readiness Training</b>	<ul style="list-style-type: none"> <li>Monthly Progress Summary</li> <li>Job Readiness Training plan must occur at least quarterly, or more frequently if the identified training needs change.</li> </ul>	<ul style="list-style-type: none"> <li>Job Readiness Training Plan due within two calendar weeks of authorization and updated every three months at minimum until all training goals have been achieved</li> <li>Email Monthly Progress Summary to office general email box.</li> <li>Monthly Progress Summaries are due by the 10<sup>th</sup> of the following month, if not received by the 10<sup>th</sup> of the month, VR will not pay the claim until it is received</li> </ul>	VR Area E-mail	<i>SmiJoh JRT Jan 2024</i>
<b>Milestone 1</b>	<ul style="list-style-type: none"> <li>Milestone Verification Form</li> </ul>	<ul style="list-style-type: none"> <li>Email Monthly Progress Summary to office general email box.</li> <li><b>Monthly Progress Summaries are due by the 10<sup>th</sup> of the following month, if not received by the 10<sup>th</sup> of the month, VR will not pay the claim until it is received</b></li> </ul>	VR Area E-mail	<i>SmiJoh MS 1</i>
<b>Milestone 2</b>	<ul style="list-style-type: none"> <li>Milestone Verification Form</li> <li>ESRP</li> </ul>	<ul style="list-style-type: none"> <li>Email Monthly Progress Summary to office general email box.</li> <li>Monthly Progress Summaries are due by the 10<sup>th</sup> of the following month, if not received by the 10<sup>th</sup> of the month, VR will not pay the claim until it is received.</li> </ul>	VR Area E-mail	<i>SmiJoh ESRP Jan 2024</i>

Authorization Type	Required Documentation	Process	Submission Location	Example of Document Name
<b>Milestone 3</b>	<ul style="list-style-type: none"> <li>Milestone Verification Form</li> </ul>	<ul style="list-style-type: none"> <li>Email Monthly Progress Summary to office general email box.</li> <li>Monthly Progress Summaries are due by the 10th of the following month, if not received by the 10th of the month, VR will not pay the claim until it is received</li> </ul>	VR Area E-mail	<i>SmiJoh MS 3</i>
<b>Supported Employment</b>	<ul style="list-style-type: none"> <li>Monthly Progress Summary</li> <li>ESRP submitted Quarterly</li> </ul>	<ul style="list-style-type: none"> <li>Email Monthly Progress Summary to office general email box.</li> <li>Monthly Progress Summaries are due by the 10th of the following month, if not received by the 10th of the month, VR will not pay the claim until it is received</li> <li>ESRP e-mailed to office general email box quarterly.</li> </ul>	VR Area E-mail	<i>SmiJoh MPS Jan 2024</i>
<b>On-the-job Supports Hourly</b>	<ul style="list-style-type: none"> <li>Monthly Progress Summary</li> <li>ESRP submitted Quarterly</li> </ul>	<ul style="list-style-type: none"> <li>Email Monthly Progress Summary to office general email box.</li> <li>Monthly Progress Summaries are due by the 10th of the following month, if not received by the 10th of the month, VR will not pay the claim until it is received</li> <li>ESRP e-mailed to office general email box quarterly.</li> </ul>	VR Area E-mail	<i>SmiJoh MPS Jan 2024</i>
<b>Job Search Assistance/Job Placement Assistance Hourly</b>	<ul style="list-style-type: none"> <li>Monthly Progress Summary</li> </ul>	<ul style="list-style-type: none"> <li>Email Monthly Progress Summary to office general email box.</li> <li>Monthly Progress Summaries are due by the 10th of the following month, if not received by the 10th of the month, VR will not pay the claim until it is received</li> </ul>	VR Area E-mail	<i>SmiJoh MPS Jan 2024</i>
<b>Youth Extended Services</b>	<ul style="list-style-type: none"> <li>Monthly Progress Summary</li> </ul>	<ul style="list-style-type: none"> <li>Email Monthly Progress Summary to office general email box.</li> <li>Monthly Progress Summaries are due by the 10th of the following month, if not received by the 10th of the month, VR will not pay the claim until it is received</li> </ul>	VR Area E-mail	<i>SmiJoh MPS Jan 2024</i>
<b>Performance Incentive Payments</b>	<ul style="list-style-type: none"> <li>Wages or hours: Paystub, offer letter or documentation from employer.</li> <li>Employer benefits: Offer letter or documentation from employer</li> </ul>	<ul style="list-style-type: none"> <li>Supporting Documentation is sent to VR Area E-mail at the time of billing.</li> </ul>	VR Area E-mail	<i>SmiJoh Paystub</i> <i>SmiJoh Offer Letter</i>

Authorization Type	Required Documentation	Process	Submission Location	Example of Document Name
<b>Benefits Review and Education (BRE)</b>	<ul style="list-style-type: none"> <li>Monthly Progress Report for BIN services</li> <li><b><u>Snapshot of Federal and State Benefits at the conclusion of BRE</u></b></li> </ul>	<ul style="list-style-type: none"> <li>Monthly Progress Reports are due by the 10th of the following month until BRE is complete to the office general email box.</li> <li>Snapshot of Federal and State Benefits at the conclusion of BRE is sent to the office general email box</li> </ul>	VR Area E-mail	<i>SmiJoh BRE Monthly Progress Report Jan 2024</i> <i>SmiJoh Snapshot of Benefits</i>
<b>Personalized Benefits Counseling (PBC)</b>	<ul style="list-style-type: none"> <li>Monthly Progress Report for BIN services</li> <li><b><u>Strategic Plan for Benefits Management and Support submitted at the conclusion of PBC</u></b></li> </ul>	<ul style="list-style-type: none"> <li>Monthly Progress Reports are due by the 10th of the following month until PBC is complete to the office general email box.</li> <li>Strategic Plan for Benefits Management and Support at the conclusion of PBC is sent to the office general email box</li> </ul>	VR Area E-mail	<i>SmiJoh PBC Monthly Progress Report Jan 2024</i> <i>SmiJoh Strategic Plan for Benefits Management and Support</i>