# Vocational Rehabilitation Services Manual Section B-100

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## Notes on the Manual

On October 1, 2017, Texas Workforce Commission’s Blind Services Division and Rehabilitation Services Division combined to create a single designated state unit (DSU) to administer the vocational rehabilitation program for Texans with disabilities.

The combined Vocational Rehabilitation Services Manual (VRSM) was initially published on October 1, 2017. The latest update to this manual is reflected in the chapters below.

Please note that VRSM includes links to information that is intended to provide additional decision-making supports to VR staff. Some of this information may not be available to individuals who are accessing the VRSM outside of TWC's firewall. Copies of materials that cannot be accessed directly through links can be made available upon request.

Substantive revisions to the content are noted in the VRSM List of Revisions. Any printed versions may not contain the latest policy changes.

If you have any questions about VRSM content, please contact the TWC Vocational Rehabilitation Division Policy Team at state office by sending an email message to [vrsm.support@twc.texas.gov](mailto:vrsm.support@twc.texas.gov).

## Manual Overview

The VR Services Manual:

* helps ensure VR customers receive quality services to assist them in achieving successful competitive integrated employment outcomes as a result of their participation in vocational rehabilitation services.;
* helps to ensure taxpayer funds are spent wisely and each purchase paid for with public funds represents full value to the taxpayer; and
* provides published policies and procedures for maintaining compliance with federal and state laws, statutes, and rules or regulations.

The latest update to this manual is reflected in the chapters below. Any printed versions may not contain the latest policy changes.

# Vocational Rehabilitation Services Manual B-100: Vocational Rehabilitation Process, Roles, and Responsibilities

## B-100: Vocational Rehabilitation Process, Roles, and Responsibilities

The chapters in this section of the VRSM present the vocational rehabilitation (VR) process in linear order, beginning with initial contact and proceeding to closure and/or post-employment services. However, it is important to keep in mind that the VR process is not always linear, and various steps in the VR process may need to be revisited when circumstances change for the customer. For example, once the individualized plan for employment (IPE) is completed and services have been initiated, a change in the customer's circumstances might require additional assessments, an updated employment goal, an interruption of services, or a change to the services originally included in the IPE, which would require an IPE amendment.

This section addresses the specific roles and responsibilities of the VR team, which is made up of a group of individuals who share responsibility for informing, educating, advocating, facilitating, and encouraging the customer as the customer makes informed decisions to reach their employment goal.

The members of the VR team will change as the customer's needs and services evolve; however, the team will always include the customer and the VR counselor.

Other VR staff that may be part of the VR team at various points in the VR process include the following:

* Courtesy counselors
* Rehabilitation assistants
* VR Managers
* VR Supervisors
* Unit specialists
* Unit management team members
* Consultants

Community rehabilitation providers include providers of contracted employment services and all individuals or programs that directly provide or facilitate services to support the VR customer's attainment of the employment goal, all of which are integral to the VR customer's success.

Family members, representatives, and other natural supports in the community can also be included as part of a VR team to help a customer reach the employment goal.

## B-101: Roles and Responsibilities of the Rehabilitation Team

### B-101-1: Customer

Texas Workforce Commission (TWC) VR customers are expected to actively engage in all stages of the VR process by:

* assuming ownership of the program of services;
* demonstrating motivation through active participation;
* engaging in the process of informed choice and decision making; and
* committing to following through with activities that lead to a competitive integrated employment outcome.

For more information about VR customers' rights and legal issues, refer to VRSM A-200: Customer Rights and Legal Issues.

For more information about informed choice and decision making, refer to VRSM B-102: Informed Choice.

### B-101-2: Vocational Rehabilitation Counselor

TWC's VR counselors have a unique skill set and specialized training to serve individuals with disabilities. This includes extensive knowledge of various aspects of disability and an understanding of the disability-related supports necessary to help VR customers reach their employment goals. This knowledge is combined with an understanding of the local labor market, business trends, and employment law.

For more information, refer to VRSM B-104: Qualified Vocational Rehabilitation Counselors.

#### Partnerships

The VR counselor partners with the customer, providers, employers, and community resources to help VR customers reach their employment goals. This includes the following:

* Providing VR counseling and guidance
* Developing and maintaining relations with community referral sources, businesses, employers, and schools, as applicable
* Collecting and analyzing all information necessary to make an accurate eligibility decision (for example, medical, psychological, school records, and employment records)
* Assisting the customer in choosing an appropriate employment goal by analyzing information to determine the customer's strengths, resources, priorities, concerns, abilities, capabilities, and interests, and matching that information to the current job market, as appropriate
* Working collaboratively with the customer to develop an IPE designed to achieve the customer's employment goal
* Ensuring timely, cost-effective provision of services and customer progress toward achievement of the employment goal
* Developing and implementing a process that leads to a successful job placement or other planned employment outcome

#### Purchasing

The VR counselor must apply best value purchasing practices and use available comparable benefits and services to ensure effective use of public funds throughout the VR process. For more information about purchasing responsibilities, refer to VRSM D-200: Purchasing Goods and Services.

#### Caseloads

VR counselors have caseloads that are either general (all conditions and disabilities) or specialized (only specific disabilities or conditions, such as visual impairment, hearing loss, or transition). For more information about specialized caseloads, refer to VRSM A-300: Specific Customer Populations.

### B-101-3: Courtesy Counselors

A courtesy counselor provides rehabilitation services to a customer who is receiving services outside the customer's home area. When deciding whether there is a need for a courtesy counselor to be assigned to support the customer, the courtesy counselor considers the customer's needs and circumstances and what is needed to maintain continuity of services for the customer.

When a courtesy counselor is assigned to provide additional support for a customer, the courtesy counselor:

* must have access to pertinent electronic and paper documents in the case file (for example, IPE and medical reports);
* may contact the customer and provide counseling and guidance;
* may purchase all services from a school, facility, or organization, such as tuition and fees, books, and supplies;
* usually handles billing procedures;
* communicates with the home counselor (the counselor to whom the case is assigned in RHW) as needed to maintain continuity of customer progress;
* ensures that funds are available and that the encumbrance complies with current policy;
* communicates with the home counselor about who issues individual service authorizations, and if the two counselors cannot agree, the courtesy counselor issues the service authorizations; and
* confers, in accordance with policy, with the home counselor to decide which counselor will implement a change in IPE services—if the home counselor is not available, contacts the home counselor's VR Supervisor for approval.

### B-101-4: Rehabilitation Assistants

The rehabilitation assistant (RA) has several critical roles that support both the VR counselor and the customer throughout the VR process. The RA:

* coordinates the approved purchase of goods and services for customers;
* collects information for the intake/profile process;
* provides basic caseload support services, such as creating, maintaining, and reviewing technical case management forms and files for accuracy using ReHabWorks (RHW);
* provides basic information regarding rehabilitation programs, services, and referrals to customers and vendors, consistent with TWC's employment lifestyle philosophy;
* serves as a contact for the customer and is often the point of contact when a provider has questions about issued service authorizations and invoicing; and
* keeps the VR counselor apprised of issues or concerns that are brought to his or her attention when communicating with customers, providers, and community resources.

### B-101-5: Vocational Rehabilitation Managers and Supervisors

The VR Manager and VR Supervisor work together to provide support, direction, and oversight of direct customer services for their assigned unit. This includes, but is not limited to:

* providing leadership and implementing business development in the community;
* facilitating communication and problem resolution for issues involving customers, providers, advocacy organizations, and/or other staff;
* identifying staff training and support needs;
* developing, coordinating, and/or providing training to continually improve staff performance and compliance; and
* providing review, consultation, and approvals for VR services.

Note: Reviews, consultations, and approvals that are assigned to a specific job title may only be delegated to a staff member with equal or higher level of authority (unless otherwise stated on the approvals table). For example, a VR Manager can delegate approvals to another VR Manager or to a regional office manager in the VR Manager's absence. However, a VR Manager must not delegate approval authority to a VR Supervisor. For more information, refer to VRSM E-200: Summary Table of Approvals, Consultations, and Notifications.

### B-101-6: Unit and Regional Management, Specialists, and Support Staff

Unit and regional management, specialists, and support staff also serve a vital role in the VR process, even though they may not work directly with VR customers on a regular basis.

Unit support specialists and unit support staff include the following:

* Administrative Supervisor
* Assistive Technology Specialist
* Customer Case Coordinator
* Process Improvement Specialist
* Purchasing Specialist
* Unit Support Assistant
* Unit Support Coordinator

Regional management, specialists, and support staff include the following:

* Regional director
* Deputy regional director
* Assistant to the director
* Business relations coordinator
* College and university coordinator
* Employment assistance specialist
* Human resources liaison
* Medical services coordinator
* Program support assistant
* Program support manager
* Regional blind services specialist
* Regional program improvement specialist
* Regional program specialist
* Regional program support specialist
* Regional quality assurance specialist
* Regional transition specialist
* VR teacher

### B-101-7: Consultants

Vocational Rehabilitation (VR) staff has access to both internal and external consultants for specialized support in decision making throughout the VR process. Consultants with specifically defined responsibilities for VR services include the following:

* Local Medical Consultant (LMC);
* Regional Psychological Consultant (RPC);
* Regional Dental Consultant (RDC);
* State Medical Director;
* State Ophthalmological Consultant;
* State Optometric Consultant;
* State Orthotic and Prosthetic Review Committee (OPRC);
* VR regional program specialists
* VR state office program specialists

For additional information about required consultations, refer to VRSM E-200: Summary Table of Approvals, Consultations, and Notifications.

For more information on how the role of medical consultants applies to specific medical services, refer to VRSM C-701-2: Medical Services Required Review and Approvals Policy.

In addition to their roles in the review of and consultation on services for specific customers, regional and state office consultants also provide technical assistance to support best business practices in their areas of specialty as related to:

* the VR process and outcomes;
* quality service delivery and documentation;
* use of comparable services, benefits, and other resources;
* quality job development and placement; and
* other areas as applicable.

#### Consultant Training Services

Unit or regional management may invite consultants to provide specialized training to staff on all aspects of the VR process in their area of specialty.

#### Review and Evaluation Services

When the clarity or completeness of reports is called into question, VR staff may request a consultant to review reports and provide a professional opinion or guidance on the:

* prognosis of selected disabilities;
* clarification of functional limitations;
* review of records, test results, and other data;
* appropriateness of recommendation for additional assessments or services; and
* application of VR policies and procedures.

#### Consultant Relationship with the Medical Community and Other Professions Outside of Vocational Rehabilitation

A consultant may:

* identify community resources for approved (nonexperimental) medical diagnostic and/or restorative services;
* help orient new physicians to the types of information and services requested by VR; and
* develop and maintain an effective working relationship with physicians, medical societies, public and private health agencies, local disability support groups, workers compensation programs, and other facilities and programs.

#### Limitations on Consultant Services for Vocational Rehabilitation Customers

A consultant does not examine or treat VR customers, except when:

* the customer is, or has been, the consultant's patient before becoming a VR customer;
* the consultant is asked to provide ancillary services, such as assisting the principal surgeon or giving emergency treatment; or
* the consultant is the only, or one of few, specialists in the immediate area.

Other cases may be referred to a consultant for treatment only when:

* there is no apparent conflict of interest, and
* the consultation with the State Office Program Specialist for Physical Disabilities is obtained first.

If a consultant is currently treating a customer, the consultant may not provide a formal VR consultation for that customer's VR case. The case must be sent to another VR consultant, who may be located in another region, for consultation.

## B-102: Informed Choice

Informed choice (also referred to as informed customer choice) begins with the first customer contact and continues throughout the VR process. Informed choice means that the customer chooses from options based on accurate information and knowledge. The options are developed in partnership between the customer and the VR counselor, and when applied correctly, result in a competitive integrated employment outcome.

It is important for all individuals involved in the rehabilitation process to consistently apply the principles of "informed customer choice."

### B-102-1: Legal Authorization for Informed Choice

#### CFR §361.52 Informed choice.

(a) General provision. The vocational rehabilitation services portion of the Unified or Combined State Plan must assure that applicants and recipients of services or, as appropriate, their representatives are provided information and support services to assist applicants and recipients of services in exercising informed choice throughout the rehabilitation process consistent with the provisions of section 102(d) of the Act and the requirements of this section.

(b) Written policies and procedures.

The designated State unit, in consultation with its State Rehabilitation Council, if it has a Council, must develop and implement written policies and procedures that enable an applicant or recipient of services to exercise informed choice throughout the vocational rehabilitation process. These policies and procedures must provide for—

(1) Informing each applicant and recipient of services (including students with disabilities who are making the transition from programs under the responsibility of an educational agency to programs under the responsibility of the designated State unit and including youth with disabilities), through appropriate modes of communication, about the availability of and opportunities to exercise informed choice, including the availability of support services for individuals with cognitive or other disabilities who require assistance in exercising informed choice throughout the vocational rehabilitation process;

(2) Assisting applicants and recipients of services in exercising informed choice in decisions related to the provision of assessment services;

(3) Developing and implementing flexible procurement policies and methods that facilitate the provision of vocational rehabilitation services and that afford recipients of services meaningful choices among the methods used to procure vocational rehabilitation services;

(4) Assisting eligible individuals or, as appropriate, the individuals' representatives, in acquiring information that enables them to exercise informed choice in the development of their individualized plans for employment with respect to the selection of the—

(i) Employment outcome;

(ii) Specific vocational rehabilitation services needed to achieve the employment outcome;

(iii) Entity that will provide the services;

(iv) Employment setting and the settings in which the services will be provided; and

(v) Methods available for procuring the services; and

(5) Ensuring that the availability and scope of informed choice is consistent with the obligations of the designated State agency under this part.

(c) Information and assistance in the selection of vocational rehabilitation services and service providers.

In assisting an applicant and eligible individual in exercising informed choice during the assessment for determining eligibility and vocational rehabilitation needs and during development of the individualized plan for employment, the designated State unit must provide the individual or the individual's representative, or assist the individual or the individual's representative in acquiring, information necessary to make an informed choice about the specific vocational rehabilitation services, including the providers of those services, that are needed to achieve the individual's employment outcome. This information must include, at a minimum, information relating to the—

(1) Cost, accessibility, and duration of potential services;

(2) Consumer satisfaction with those services to the extent that information relating to consumer satisfaction is available;

(3) Qualifications of potential service providers;

(4) Types of services offered by the potential providers;

(5) Degree to which services are provided in integrated settings; and

(6) Outcomes achieved by individuals working with service providers, to the extent that such information is available.

(d) Methods or sources of information.

In providing or assisting the individual or the individual's representative in acquiring the information required under paragraph (c) of this section, the State unit may use, but is not limited to, the following methods or sources of information:

(1) Lists of services and service providers.

(2) Periodic consumer satisfaction surveys and reports.

(3) Referrals to other consumers, consumer groups, or disability advisory councils qualified to discuss the services or service providers.

(4) Relevant accreditation, certification, or other information relating to the qualifications of service providers.

(5) Opportunities for individuals to visit or experience various work and service provider settings.

### B-102-2: Applying Principles of Informed Choice to the VR Process

The principles of informed customer choice are set forth in regulations that implement the Rehabilitation Act of 1973, as amended, and require that the customer must be informed about and involved in choosing among alternative:

* goals;
* objectives;
* services;
* entities providing such services; and
* methods used to provide or procure the services.

To achieve positive employment outcomes, the customer must be involved in decision making to the greatest extent to which the customer is capable of participating.

During the first meeting with the customer, the VR counselor explains the concepts of:

* informed choice;
* effective partnerships between the VR counselor and the customer; and
* the VR process, including the specific purposes of the VR program.

The customer and the VR counselor jointly choose providers for assessments and other information necessary to determine eligibility. During IPE development, the VR counselor and the customer jointly:

* consider a variety of competitive integrated employment goals that will help the customer overcome impediments to employment; and
* assess which choice is most consistent with the customer's knowledge, skills, abilities, and other key attributes.

After the customer's specific rehabilitation needs have been identified, the VR counselor provides information on available services that meet the customer's needs within the scope of state and federal laws, agency policies and procedures, and the highest ethical standards. In some cases, there may be only one appropriate alternative that meets the customer's needs and can be supported by VR. If alternatives developed by VR are not acceptable to the customer, or if preferences expressed by the customer are not among the alternatives presented, the VR counselor discusses options until the VR counselor and the customer reach a mutually acceptable decision. If the VR counselor and the customer cannot reach an agreement, the VR counselor informs the customer of his or her right to appeal. For more information, refer to VRSM A-200: Customer Rights and Legal Issues.

## B-103: Understanding the VR Process

At the first meeting with a customer and throughout the case, the most important message to convey is that employment is the purpose of the VR process and that VR services must demonstrate a link to this purpose. The VR counselor clearly explains that the expectation for partnership between the VR counselor and the customer is to achieve the goal of employment.

At each step of the process, the VR counselor takes the customer through a series of decisions about goals, services, and providers to achieve outcomes that the VR counselor and the customer have agreed upon.

### Steps in the VR Process

Steps in the VR process include the following:

* VRSM B-200: Processing Initial Contacts and Applications
* VRSM B-300: Determining Eligibility
* VRSM B-400: Completing the Comprehensive Assessment
* VRSM B-500: Developing the Individualized Plan for Employment and Post-Employment
* VRSM B-600: Closure
* VRSM Part C - Vocational Rehabilitation Services

For more information about each of these steps, refer to the appropriate section.

## B-104: Qualified Vocational Rehabilitation Counselors

VR is a dynamic process with a measurable outcome of competitive integrated employment (CIE). It uses a flexible model that comprises global concepts and parameters within which the VR counselor operates. Successful VR relies on qualified VR counselors with the specialized skills and training to make decisions that support competitive integrated employment (CIE) outcomes for VR customers. VR counselors are required to meet the Comprehensive System of Personnel Development (CSPD) standard under the Qualified Vocational Rehabilitation Counselor (QVRC) Program.

TWC rules governing the QVRC Program are found in 40 TAC §850.11.

### B-104-1: Comprehensive System of Personnel Development Compliance

As part of the QVRC Program, VR requires a counselor to meet the CSPD standard by holding:

* a master's degree in rehabilitation counseling or clinical rehabilitation counseling;
* a master's degree in counseling or counseling-related field with specific coursework as noted later in this section;
* a master's, specialist, or doctoral degree in specific majors with specific coursework as noted later in this section;
* a current certified rehabilitation counselor (CRC) certificate from the Commission on Rehabilitation Counselor Certification (CRCC); or
* current licensure for licensed professional counselor (LPC).

A VR counselor is expected to meet the QVRC CSPD standard within seven years of completing the initial training year. A newly hired counselor must complete VR1362, Qualified Vocational Rehabilitation Counselor (QVRC) Acknowledgment, within the first 30 days of employment. By signing VR1362, the counselor acknowledges that VR requires that VR counselors meet the QVRC CSPD standard. State office VR staff must conduct transcript reviews and/or confirm certifications to determine compliance with the standard or to outline coursework to be completed by the counselor.

If the VR counselor does not meet QVRC CSPD requirement, the QVRC CSPD timeline is calculated to determine the date by which the VR counselor must meet the standard. A VR counselor who does not meet the QVRC CSPD standard by the assigned timeline date will be separated from employment.

VR may hire counselors at the bachelor's degree level when there is not a qualified applicant with a master's degree. Acceptable bachelor's degrees include not only VR counseling but also:

* social work;
* psychology;
* disability studies;
* business administration;
* human resources;
* special education;
* supported employment;
* customized employment;
* economics; and
* other fields that reasonably prepare individuals to work with customers with disabilities and with employers.

VR counselors hired at the bachelor's level must have at least one year of paid or unpaid experience related to direct work with individuals with disabilities. When hired at the bachelor's degree level, a VR counselor is required to meet the QVRC CSPD standard within seven years of completing the initial training year.

### B-104-2: Required Coursework Areas

A VR counselor with a master's degree in counseling or a counseling-related field must, at a minimum, complete the graduate course Theories and Techniques of Counseling and six graduate courses with a primary focus on each of the following areas:

* Assessment and standardized testing
* Occupational information or job placement
* Case management and rehabilitation services
* Medical aspects of disabilities
* Psychosocial aspects of disabilities
* Multicultural issues

A VR counselor with a master's, specialist, or doctoral degree in fields of specific study, as listed below, must provide transcript verification of completing a graduate course on the Theories and Techniques of Counseling and successfully complete six graduate courses, each with a primary focus on the areas listed above, and additionally complete one course on the foundations of rehabilitation counseling.

Applicants with master's, specialist, or doctoral degrees not listed below would need a full master's degree in rehabilitation counseling or clinical rehabilitation counseling.

* Behavioral health
* Behavioral science
* Disability studies
* Human relations
* Human services
* Marriage and family therapy
* Occupational therapy
* Psychology
* Psychometrics
* Rehabilitation administration/services
* Social work
* Special education
* Vocational assessment/evaluation
* Another field that reasonably provides competence in the employment sector in a disability field or rehabilitation-related fields

Applicants for employment with VR who meet the QVRC CSPD standard for counselor positions are given preference. If a candidate is hired who does not meet the QVRC CSPD standard, the chosen candidate must be informed through the job offer letter that he or she is required to meet the standard by participating in the QVRC program and completing the required coursework within seven years after completing the initial training year.

Refer to the Program Operations Intranet page under the HR Personnel Processes section for more information about QVRC CSPD standards and requirements.