# **Vocational Rehabilitation Services Manual B-200: Processing Initial Contacts and Applications**

Revised June 26, 2023

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## B-203: Initial Contact

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## B-206: Opening a Case

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### B-206-5: Adjusting the Phase of a Previously Closed Case

A phase adjustment is a RHW process that changes a closed case.

Phase adjustments must be used only when the:

* case was closed either successfully or unsuccessfully after IPE; or
* case was closed before application (potentially eligible cases only); and
* case was phase adjusted within the current program year.

#### Closure after IPE Is Returned to Active Status

To request and complete a phase adjustment from a closed status after IPE back to an active status, follow the procedure below.

The VR counselor takes the following steps:

1. Reviews the case and gathers information from the customer to ensure that a phase adjustment is appropriate
2. Selects the Phase Adjustment Request tab from the case in RHW
3. Selects the Save tab to set the approval status to pending and to generate an action for the VR Supervisor in RHW
4. Documents the justification for the phase adjustment in a case note that will automatically open in RHW when the phase adjustment request is saved

The VR Supervisor takes the following steps:

1. Reviews and approves or denies the phase adjustment request in RHW by selecting the Phase Adjustment Approval tab from the case in RHW
2. Documents the approval or non-approval of the decision for the phase adjustment in a case note in RHW
3. Notifies the VR counselor that the phase adjustment was approved or denied

Note: This is available only if the adjustment is within the program year quarter the case was closed.

#### Unsuccessful Closure Changed to a Successful Closure after IPE

If a customer whose case was closed as an unsuccessful closure became employed during the same program year quarter in which the case was closed, the VR counselor must first complete the phase adjustment process outlined above.

To change an unsuccessful closure after IPE to a successful closure, follow the procedure below.

The VR counselor takes the following steps:

1. Reviews the case to ensure that all criteria for Successful Closure are met (Refer to [B-600: Closure](https://twc.texas.gov/vr-services-manual/vrsm-b-600))
2. Updates the employment information in RHW (Refer to [B-600: Closure](https://twc.texas.gov/vr-services-manual/vrsm-b-600))
3. Selects the Phase Adjustment Request tab from the case in RHW
4. Selects the Save tab to set the approval status to pending and to generate an action for the VR Supervisor in RHW
5. Documents the justification for the phase adjustment in a case note that will automatically open in RHW when the phase adjustment request is saved

The VR Supervisor takes the following steps:

1. Reviews and approves or denies the phase adjustment request in RHW by selecting the Phase Adjustment Approval tab from the case in RHW
2. Documents the approval or non-approval of the decision for the phase adjustment in a case note in RHW
3. Notifies the VR counselor that the phase adjustment was approved or denied

Note: This is available only if the adjustment is within the program year quarter the case was closed.

If the phase adjustment is approved, the VR counselor closes the case as a successful closure in RHW.

#### Successful Closure Changed to Unsuccessful Closure after IPE

If a case was closed as a successful closure but did not meet the criteria for a successful closure, the VR counselor must first complete the phase adjustment process above.

To change a successful closure after IPE to an unsuccessful closure, follow the procedure below.

The VR counselor takes the following steps:

1. Reviews the case to ensure that all criteria for Unsuccessful Closure are met (Refer to [B-600: Closure](https://twc.texas.gov/vr-services-manual/vrsm-b-600))
2. Selects the Phase Adjustment Request tab from the case in RHW
3. Selects the Save tab to set the approval status to pending and to generate an action for the VR Supervisor in RHW
4. Documents the justification for the phase adjustment in a case note that will automatically open in RHW when the phase adjustment request is saved

The VR Supervisor reviews and approves or denies the phase adjustment request in RHW by selecting the Phase Adjustment Approval tab from the case in RHW.

Note: This is available only if the adjustment is within the program year quarter the case was closed.

If the change is approved, the VR counselor closes the case as an unsuccessful closure in RHW.

**Closure Before Application Is Returned to Potentially Eligible with Case Assignment (for Pre-ETS only)**

In order to request and complete a phase adjustment from a Closure before Application to Potentially Eligible with Case Assignment, follow the procedure below.

The VR counselor takes the following steps:

1. Reviews the case and gathers information from the customer to ensure that a phase adjustment is appropriate
2. Selects the Phase Adjustment Request tab from the case in RHW
3. Selects the Save tab to set the approval status to pending and to generate an action for the VR Supervisor in RHW
4. Documents the justification for the phase adjustment in a case note that will automatically open in RHW when the phase adjustment request is saved

The VR Supervisor takes the following steps:

1. Reviews and approves or denies the phase adjustment request in RHW by selecting the Phase Adjustment Approval tab from the case in RHW
2. If the phase adjustment is approved, the VR Supervisor saves the Phase Adjustment Approval page as approved in the Management Unit Supervisor Approval drop-down
3. If the phase adjustment is denied, the VR Supervisor saves the Phase Adjustment Approval page with Denied in the Management Unit Supervisor Approval drop-down
4. Documents the approval or non-approval of the decision for the phase adjustment in a case note in RHW
5. Notifies the VR counselor that the phase adjustment was approved or denied

For the definition of Pre-ETS eligibility, refer to C-1300 Transition Services for Students and Youth with Disabilities.

If the case does not meet the criteria for Pre-ETS eligibility, the case will not be phased adjusted.

Note: This is available only if the adjustment is within the program year (July 1-June 30) quarter. If the adjustment is outside the quarter, but within the program year, email [vr.rhwsupport@twc.texas.gov](mailto:vr.rhwsupport@twc.texas.gov) to phase adjust the case with VR Supervisor approval. If the phase adjustment request is outside of the program year, approval by the Deputy Division Director for Field Services is required.

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