# Vocational Rehabilitation Services Manual B-500: Individualized Plan for Employment and Post-Employment

Revised July 1, 2024

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## B-504: Content of the IPE

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### B-504-5: Planned Services

The IPE must include all substantial goods and services and any anticipated ancillary or supportive goods and services that are necessary for the customer to reach the identified employment goal. There must be a clear association between the identified good or service, the customer's disability, and the employment goal.

The IPE should not reflect specific rates but should refer to them as "will pay amounts per policy."

The VR counselor must review carefully the published policies and procedures for each good or service before including it on the customer's IPE.

If consultations or approvals are required for a specific good or service, these must be completed and documented by the consultant or approver in a RHW case note before the good or services is included in the customer's IPE. Refer to VRSM E-200: Summary Table of Approvals, Consultations, and Notifications.

#### Types of Services

Enter the specific services the customer will receive to help the customer find employment.

The following vocational rehabilitation services are available to assist the individual with a disability in preparing for, securing, retaining, advancing in or regaining an employment outcome that is consistent with the individual's unique strengths, resources, priorities, concerns, abilities, capabilities, interests, and informed choice:

* Assessment for determining eligibility and priority for services by qualified personnel, including, if appropriate, an assessment by personnel skilled in rehabilitation technology;
* Assessment for determining vocational rehabilitation needs by qualified personnel, including, if appropriate, an assessment by personnel skilled in rehabilitation technology.
* Vocational rehabilitation counseling and guidance, including information and support services to assist an individual in exercising informed choice;
* Referral and other services necessary to assist applicants and eligible individuals to secure needed services from other agencies and to advise those individuals about client assistance programs;
* Physical and mental restoration services;
* Vocational and other training services, including personal and vocational adjustment training, advanced training in, but not limited to, a field of science, technology, engineering, mathematics (including computer science), medicine, law, or business);
* Textbooks, tools, and other training materials;
* Maintenance;
* Transportation in connection with the provision of a VR service;
* Services to family members of VR customers if necessary to enable the applicant or eligible individual to achieve an employment outcome;
* Interpreter services;
* Reader services, rehabilitation teaching services, and orientation and mobility services for individuals who are blind;
* Job-related services, including job search and placement assistance, job retention services, follow-up services, and follow-along services;
* Supported employment services;
* Personal assistance services;
* Post-employment services;
* Occupational licenses, tools, equipment, initial stocks, and supplies;
* Rehabilitation and assistive technology services, including vehicle modification, telecommunications, sensory, and other technological aids and devices;
* Transition services for students and youth with disabilities or pre-employment transition services for students;
* Technical assistance and other consultation services to conduct market analyses, develop business plans, and otherwise provide resources, to the extent those resources are authorized to be provided through the statewide workforce development system, to eligible individuals who are pursuing self-employment or telecommuting or establishing a small business operation as an employment outcome;
* Customized employment; and
* Other goods and services determined necessary for the individual with a disability to achieve a competitive integrated employment outcome.

Authority: Sections 7(37), 12(c), 103(a), and 113 of the Rehabilitation Act of 1973, as amended; 29 U.S.C. 705(37), 709(c), 723(a), and 733.

#### Counseling and Guidance

Counseling and guidance must be included on every IPE as a planned service. For more information, refer to VRSM C-100: Counseling and Guidance.

#### Substantial Goods and Services

A good or service is substantial when it helps the customer to achieve an employment outcome, regardless of the amount of time, effort, or funds expended, by

* correcting or significantly improving the disability;
* removing or significantly reducing the vocational impediment(s);
* providing the customer with informed choices of a
  + competitive integrated employment goal, and
  + plan to accomplish the goal;
* training the customer in the necessary work skills despite the disability and/or vocational impediment(s); and/or
* modifying the working conditions to be compatible with the disability and/or vocational impediment(s).

All substantial goods and services must be included on the customer's IPE. Any change to or addition of a substantial good or service must be documented in an IPE amendment. For more information on IPE amendments, refer to VRSM B-505-2: IPE Amendment.

#### Ancillary Goods and Services

Ancillary goods or services are those things that are an integral part of a substantial service. For example, a surgery that is performed by a specific physician at a specific facility is likely to require ancillary services such as anesthesia, pathology, radiology, and consultations.

Anticipated ancillary services, such as those that are included on the Form VR3110 Surgery and Treatment Recommendation or the Form VR3109 Eye Surgery and Treatment Recommendations, forms found in the forms catalogue must be included on the customer's IPE. If there is a change to the ancillary services after the IPE has been completed, but the substantial services, such as the physician and facility, remain the same, then a service justification case note can be used to document this change; an IPE amendment is not required.

For more information refer to VRSM D-202-1: Documentation Requirements and VRSM E-300: Case Notes Requirements.

If, during the provision of planned services, unanticipated ancillary services are necessary to complete the service, refer to D-204-2: After-the-Fact Backdated Service Authorizations for required processes and procedures.

#### Supportive Goods and Services

Supportive goods and services are those that are necessary for a customer to participate in

* assessments to determine eligibility for VR services and identify VR needs; or
* substantial VR services that are included in the IPE or the current IPE amendment.

If a supportive good or service is anticipated at the time the IPE is completed, it should be included on the customer's IPE.  However, if there is a change to a planned supportive service or if the need for a supportive service is identified after the IPE has been completed, then an IPE amendment is not required; a service justification case note can be used to document this change. The service justification case note must clearly document how the good or service supports a substantial service that is included on the customer's IPE.

Examples of supportive goods or services may include interpreter services, unplanned supplies, and tutors. For more information on supportive goods and services, refer to VRSM C-1400: Supportive Goods and Services.

#### Providers

The IPE must include a description of the entity or entities chosen by the customer that will provide VR services. To meet this requirement, the IPE must include the name of the provider or entity that will provide the service listed on the IPE. The only exception to this requirement is when there is required bidding process and the vendor is unknown, in that case list "State Bid Process/Purchasing."

Before including a provider on the customer's IPE, the VR counselor informs the customer about alternative providers for each service. If requested, the VR counselor gives the customer a list of available providers for specific VR services. The list includes only those providers who are associated with the RHW specification level for the geographic area where the customer will be receiving services at the time of the request.

If the customer has a service provider that the customer wishes to use, it is VR staff responsibility to determine whether that provider meets the standards and will accept TWC-VR fee schedules. See the VR Standards for Providers Manual.

If the preferred provider is not set up in ReHabWorks, refer to VRSM D-211: Setting Up and Paying Providers for information about setting up providers. The provider must be set up in RHW before they can be included on the customer's IPE.

#### Services Based on Level of Significance

If the customer's case is designated as significant or most significant:

* include in the IPE any needed interventions for each functional capacity area that is identified as seriously limited; and
* verify that VR will be providing at least one substantial service over an extended period of time in addition to counseling and guidance, and any assessment services necessary to develop the IPE.

For more information about level of significance, see VRSM B-309: Establishing the Level of Significance.

#### Dates of Service

The dates of service on the IPE should clearly reflect the total time that it will take the customer to complete all IPE services, reach the identified employment goal, and meet the requirements for successful case closure.

The start date can be no earlier than the date that the IPE is signed.

For each service:

* enter the date that the service is expected to begin as the start date; and
* enter the date that each service is expected to end as the end date.

If it becomes apparent that the start or end dates for a specific service falls outside the parameters of the dates identified on the IPE, and if the service:

* is an ancillary service or a service that supports a substantial service that is on the IPE - this change can be documented in a service justification case note;
* is a substantial service, this change must be documented in an IPE amendment.

If services dates expire for a substantial service included in the IPE, an amendment must be completed.

#### Payment Method

The IPE includes the payment method for each service. The payment method depends on whether there is a cost for a good or service and include arranged, provided, and purchased. For specific descriptions of each type of payment method, refer to the VR Glossary and the ReHabWorks Users Guide, E-200: Case Service Record.

#### Service Records

A service record and a service authorization must be created in RHW for each purchased service that is included on the customer's IPE. Refer to VRSM D-204: The Purchasing Process for additional information about authorizing the purchase of a good or service with a service authorization.

Service records must also be completed for in-house services that are provided by:

* a rehabilitation teacher;
* CCRC;
* the Vocational Diagnostic Unit (VDU);
* Employment Assistance Services (EAS); and
* the Assistive Technology Unit (ATU).

Do not create service records for:

* counseling and guidance; or
* completing a certificate of blindness for a tuition exemption.

For additional information, refer to the ReHabWorks Users Guide, E-200: Case Service Record.

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