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

Revised January 15, 2021

## B-502: IPE Process

The IPE is developed with the customer or as appropriate, with the customer's representative, in his or her native language or mode of communication.

VR staff informs the customer of the available options for all or part of the IPE:

* with direct assistance from a VR counselor that is employed by TWC-VR,
* by the individual (without any assistance),
* with assistance of a qualified counselor that is not employed by TWC-VR, or
* with assistance, as appropriate, from a disability advocacy organization.

TWC-VR does not pay for assistance with IPE development.

The IPE must be approved by a VR counselor employed by TWC-VR and must include all required content. See [B-504: Content of the IPE](https://twc.texas.gov/vr-services-manual/vrsm-b-500#b504) for more information.

Before asking the customer to sign the IPE, the VR counselor must explain:

* the terms and conditions for the delivery of services, including the start and end dates of the services;
* any financial commitment to the plan;
* the customer's right to appeal; and
* the availability of the Client Assistance Program.

A copy of the ["Can We Talk" brochure](https://twc.texas.gov/files/jobseekers/vocational-rehabilitation-appeal-process-twc.pdf) and the information to make informed choices must be provided (or offered) at every step in the VR process: application, eligibility, IPE, denial of services, and closure. VR staff must document in RHW the date and method the information was provided and/or offered. Once signed, a copy of the IPE or IPE amendment must be provided to the customer.

### B-502-1: Mismatched Identification After the IPE in Reports and Other Correspondence

If a customer has not legally changed his or her name and wishes to be identified by another name, the following may be done to reflect his or her preferred name:

* For documentation that does not require a legal name, such as a case note, the following statement is an example of how VR counselors must initially document why the customer will be referred to by another name.

Example: “Joe Smith is in the process of transitioning from a man to a woman. The customer’s legal name is Joe Smith; however, the customer identifies as Jane Smith. Therefore, all future case notes will reflect her preferred name of Jane Smith.”

* For documentation that does require a legal name or forms signed by the customer, the following statement is an example of how VR counselors or providers must document why the customer will be referred to by another name.

Example: “Joe Smith is the customer’s legal name; however, the customer identifies as Jane Smith. Therefore, the customer will be referred to as Jane Smith.”

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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 [E-200: Summary Table of Approvals, Consultations, and Notifications](https://twc.texas.gov/files/partners/vrsm-e-200.docx).

#### Types of Services

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#### 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 [B-309: Establishing the Level of Significance](https://twc.texas.gov/vr-services-manual/vrsm-b-300#b309).

#### Dates of Service

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