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

## B-505: Joint Annual Review and IPE Amendments

The IPE is reviewed at least annually by the VR counselor and the customer or, as appropriate, the customer's representative to assess the customer's progress in achieving the identified employment goal. The review of the IPE can be completed as a formal joint annual review (JAR) or when the IPE is amended.

Completing either a joint annual review or an IPE amendment resets the clock for the next annual review. The new date for completing the next JAR is one year from the date of the most recent JAR or IPE Amendment.

### B-505-1: Joint Annual Review

When completing a JAR, the VR counselor meets with the customer and, as appropriate, the customer's representative to

* review the details in the current IPE or IPE amendment;
* determine if there is a need to complete an IPE amendment;
* review and update all information captured in RHW under the following menus:
  + Initial Contact;
  + Application; and
  + Plan;
* review and update release forms; and
* document the joint annual review (JAR) in a case note.

#### JAR Documentation

The JAR case note must include a specific review of all required elements of the IPE, including a review of the progress made toward reaching the employment goal. This includes a review of the

* Employment goal
* Educational goal
* Intermediate objectives
* Progress (including training progress, if applicable)
* Planned services and goods (including providers and service dates)
* Comparable benefits
* Customer participation in cost of services
* Roles and Responsibilities

If the JAR does not result in substantive changes in the employment goal, the VR services to be provided, or the providers of the VR services, then an amendment is not required. Include a statement in the JAR case note to confirm that both customer and VR counselor agree that no changes are needed.

If the JAR results in substantive changes in the employment goal, the VR services to be provided, or the providers of the VR services, then an IPE amendment is required.  The results of the JAR can be documented in the IPE amendment case note.

If the JAR results in a need for new diagnostics to determine whether new services are needed, an IPE amendment is not necessary.  A service justification case note must be written in RHW explaining the necessity for the new diagnostics.  Once the results have been received and reviewed by the VR counselor and customer, if new services are required and agreed upon, an IPE amendment will be necessary to cover those services.

If the JAR results in a need for only new ancillary or supportive services to support services that already exist on the IPE or current IPE amendment, an IPE amendment is not required; instead, a service justification case note can be used to document the need for and authorization for these services. The start and end dates for the ancillary or supportive service must not go past the end date for the associated service on the IPE.

Refer to [E-300: Case Notes Requirements](https://twc.texas.gov/files/partners/vrsm-e-300.docx) for additional information.

### B-505-2: IPE Amendment

The IPE is amended, as necessary, by the customer or, as appropriate, the customer's representative, in collaboration with the VR counselor, if there are substantive changes in the employment goal, the VR services to be provided, or the providers of the VR services. A substantial change to the employment goal occurs when there is a change to the Standard Occupation Classification job family identified in the first two digits of the SOC code.

The amendment must be completed before the dates of services on the IPE or current IPE amendment have expired.

If there is a gap between the date the IPE is amended and the end dates of services on the expired IPE or IPE amendment, there will need to be multiple line items for the same service that reflect the gap in services. In this case, when the service is carried over to the new IPE amendment, the start and end dates will remain as they were on the previous IPE or IPE amendment; if the service is to resume after the gap between the expiration date of the IPE or IPE amendment, the next line item for the service must include the new start date, which is the date of the current IPE amendment or a later date. This line item will also include the anticipated end date of the service.

When completing an IPE amendment, review and update what is reviewed as part of the joint annual review (see [B-505-1: Joint Annual Review](https://twc.texas.gov/vr-services-manual/vrsm-b-500" \l "b505-1)).

#### Content of the IPE Amendment

The IPE amendment is a standalone document that captures the goals and services that the customer will need to continue to progress towards a competitive integrated employment goal. All policies and procedures for completing the original IPE apply to the completion of the IPE amendment. Refer to B-503: Content of the IPE for more information.

All services that remain in effect at the time that the IPE is amended must be included on the IPE amendment. The start date of services on the IPE amendment should reflect the date that the services first started if they were included in the original IPE or a previous IPE amendment. New services that are added to the IPE amendment cannot have a start date prior to the date of the current IPE amendment.

The IPE amendment must be signed by both the VR counselor and the customer or their representative in RHW or on a printed version of the [VR5159, Individualized Plan for Employment (IPE) Amendment](https://twc.texas.gov/forms/index.html) before services can continue.

If RHW is not available, you can use VR5159, Individualized Plan for Employment (IPE) Amendment. Enter the information from the VR5159 into RHW as soon as possible and maintain the signed paper copy of the VR5159 in the customer's case folder. When the IPE amendment is completed in RHW, print and provide a copy of the document to the customer.

#### IPE Amendment Documentation

When completing an IPE amendment, review and update what is reviewed as part of the joint annual review (see [B-505-1: Joint Annual Review](https://twc.texas.gov/vr-services-manual/vrsm-b-500#b505-1)). In addition to this information, document, in ReHabWorks, the justification for any changes to the goals, services, providers, or other content that will be included in the IPE amendment.

Refer to [E-300: Case Notes Requirements](https://twc.texas.gov/files/partners/vrsm-e-300.docx) for additional information.

### B-505-3: Amending the IPE for Post-Employment Services

Refer to [B-607: Post-Employment Services](https://twc.texas.gov/vr-services-manual/vrsm-b-600#b607) for information about completing an IPE amendment for post-employment services.