# VR Services Manual E-300: Case Note Requirements

Revised July 1, 2021

## Case Note Requirements

| **Case Note Topic** | **Staff Use** | **Documentation** | **VRSM Ref.** |
| --- | --- | --- | --- |
| Attempt to Complete C&G | VR counselor use only | A case note that documents attempts by the VR counselor to complete C&G with the customer either in person or by phone messages, electronic communication, or written correspondence.  The case note should clearly indicate   * that the purpose of the contact was to reach the customer to complete C&G; * details of the manner of communication, such as “message left” or “email sent”, and * any planned follow-up actions. | C-102-1 |
| Attemp to Contact | Any VR staff | A case note that documents attempted contacts made in person, by phone messages, electronic communications, or written correspondence by any VR staff member with the   * customer; * customer’s representative; * legal guardian; or * others with direct involvement or information about customer’s participation in VR services.   Each case note should clearly indicate   * the purpose of the contact, * details, such as how and with whom a message was left, and * planned follow-up actions. | B-504-9  B-605  C-102-1  C-310-4 |

…

|  |  |  |  |
| --- | --- | --- | --- |
| Counseling and guidance | VR counselor use only | A case note or series of case notes entered by the VR counselor that reflects the skillful application of counseling strategies and interventions. These case notes must include the:   * **issue** addressed through C&G that are related to the impediments to employment, IPE, and/or participation in VR services; * **strategies** for resolution of the issue to include description of decision-making processes involved; * **customer’s participation** in the resolution; * **customer’s reaction**; and * **actions required** of the customer or counselor.   **REQUIREMENT**: C&G must be provided on the same day the IPE is completed, and documented in RHW within 7 calendar days of the completion of the IPE as a C&G case note with the Add to Topic of “IPE Implemented.” C&G must also be documented at the frequency agreed upon on the IPE.  **TIP**: As with other case notes, the writing style and format of a C&G case note can be individualized by the VR counselor if the required content is included.  **TIP**: C&G frequency is **not** the same as basic frequency of contact or “FOC” on the IPE. C&G must be completed by a counselor; FOC can be maintained by any VR staff. FOC is evaluated in the IPE services section of a Compliance and Quality Case Review. However, C&G does count as a contact for the purpose of tracking FOC.  **TIP**: C&G must be entered using the case note title, “Counseling and Guidance.” When C&G is provided during other meetings, such as the joint annual review or IPE Amendment, document the C&G in an additional case note titled, “Counseling and Guidance.” | B-504-12  C-102 |

…

| **Case Note Topic** | **Staff Use** | **Documentation** | **VRSM Ref.** |
| --- | --- | --- | --- |
| Diagnostic Interview | VR counselor use only | A case note or series of case notes that describes pertinent information garnered from the customer, the customer's family or representative, and any available records during the Diagnostic Interview meeting with the VR counselor.  The case note must include, from the customer’s perspective:   * a brief description of the disability, including relevant history and current treatment; * current functional limitations and their impact on employment, education, and independence; * relevant history of access to and current use of rehabilitation technology; * perception of problems or issues related to his or her disabilities and need for services; * educational and work history; * general knowledge, skills, and abilities; * available resources and comparable benefits (or the need to apply for benefits); and * SSI or SSDI status (including verification of benefits or a note about the need to verify benefits).   The case note must also include:   * the VR counselor’s observations of the customer through the interview as they relate to the customer's ability to participate in and benefit from VR services; and * a statement of the next actions needed to move the case through the VR process.   **TIP**: The "Can We Talk" brochure and the information to make informed choices must be provided and/or offered and documented at application. VR staff must document in RHW the date and method the information was provided and/or offered.  **TIP**: At application, VR staff must document in a case note that voter registration services were provided according to Vocational Rehabilitation Services Manual policy. | B-205  A-212-1 |

…