# VR Services Manual E-300: Case Note Requirements

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## Overview of Table

This table reflects the content found in the VRSM as of the revision date this document. Unless otherwise specified, the content of more recently updated sections of the VRSM and other relevant policy manuals or guidance memorandums supersede instructions included in this table. Staff are expected to review the referenced policy content before taking any action on a case.

## Legal Requirements

Code of Federal Regulations, Title 34: Education, Part 361-State Vocational Rehabilitation Services Program, ,Subpart A-General,§361.47 Record of services.

(a) The designated State unit must maintain for each applicant and eligible individual a record of services that includes, to the extent pertinent, the following documentation:

(1) If an applicant has been determined to be an eligible individual, documentation supporting that determination in accordance with the requirements under §361.42.

(2) If an applicant or eligible individual receiving services under an individualized plan for employment has been determined to be ineligible, documentation supporting that determination in accordance with the requirements under §361.43.

(3) Documentation that describes the justification for closing an applicant's or eligible individual's record of services if that closure is based on reasons other than ineligibility, including, as appropriate, documentation indicating that the State unit has satisfied the requirements in §361.44.

(4) If an individual has been determined to be an individual with a significant disability or an individual with a most significant disability, documentation supporting that determination.

(5) If an individual with a significant disability requires an exploration of abilities, capabilities, and capacity to perform in realistic work situations through the use of trial work experiences to determine whether the individual is an eligible individual, documentation supporting the need for, and the plan relating to, that exploration and documentation regarding the periodic assessments carried out during the trial work experiences in accordance with the requirements under §361.42(e).

(6) The individualized plan for employment, and any amendments to the individualized plan for employment, consistent with the requirements under §361.46.

(7) Documentation describing the extent to which the applicant or eligible individual exercised informed choice regarding the provision of assessment services and the extent to which the eligible individual exercised informed choice in the development of the individualized plan for employment with respect to the selection of the specific employment outcome, the specific vocational rehabilitation services needed to achieve the employment outcome, the entity to provide the services, the employment setting, the settings in which the services will be provided, and the methods to procure the services.

(8) In the event that an individual's individualized plan for employment provides for vocational rehabilitation services in a non-integrated setting, a justification to support the need for the non-integrated setting.

(9) In the event that an individual obtains competitive employment, verification that the individual is compensated at or above the minimum wage and that the individual's wage and level of benefits are not less than that customarily paid by the employer for the same or similar work performed by non-disabled individuals in accordance with §361.5(c)(9)(i).

(10) In the event an individual achieves an employment outcome in which the individual is compensated in accordance with section 14(c) of the Fair Labor Standards Act or the designated State unit closes the record of services of an individual in extended employment on the basis that the individual is unable to achieve an employment outcome consistent with §361.5(c)(15) or that an eligible individual through informed choice chooses to remain in extended employment, documentation of the results of the semi-annual and annual reviews required under §361.55, of the individual's input into those reviews, and of the individual's or, if appropriate, the individual's representative's acknowledgment that those reviews were conducted.

(11) Documentation concerning any action or decision resulting from a request by an individual under §361.57 for a review of determinations made by designated State unit personnel.

(12) In the event that an applicant or eligible individual requests under §361.38(c)(4) that documentation in the record of services be amended and the documentation is not amended, documentation of the request.

(13) In the event an individual is referred to another program through the State unit's information and referral system under §361.37, including other components of the statewide workforce development system, documentation on the nature and scope of services provided by the designated State unit to the individual and on the referral itself, consistent with the requirements of §361.37.

(14) In the event an individual's record of service is closed under §361.56, documentation that demonstrates the services provided under the individual's individualized plan for employment contributed to the achievement of the employment outcome.

(15) In the event an individual's record of service is closed under §361.56, documentation verifying that the provisions of §361.56 have been satisfied.

## Delegating Required Documentation

Documentation responsibilities cannot be delegated and must be entered in RHW directly by the individual completing the action that is being documented.

## Case Note Requirements

| **Case Note Topic** | **Staff Use**  | **Documentation** | **VRSM Reference** |
| --- | --- | --- | --- |
| ATF Ancillary SA (After the Fact Ancillary Service Authorization) | Any VR staff | A case note entered by VR staff member that is requesting, approving, or denying a request to issue a replacement SA. RequestThe “Add to Topic” for a request includes the specific good or service and the purpose of the case note, such as “Training Replacement SA Request” or “Medical Services Replacement SA Request.The case note content must include the following: * what is being requested (include specific good or service, provider, and anticipated dates of service);
* circumstances supporting the request; and
* name and job title of requester.

**TIP:** Verify the required management approval level per applicable policy prior to documenting the request to ensure that it is routed to the correct approver in a timely manner.Approval or DenialThe “Add to Topic” for an approval or denial includes the specific good or service and the specific decision (“approved” or “denied”), such as “Training Replacement SA – Approved.”The case note content must include the following:* the parameters of the approval or denial (include specific good or service, provider, and when applicable, the date range of the approval);
* type of review completed in TxROCS (if applicable); and
* name and job title of staff making decision.

**TIP:** Verify the required management approval level per applicable policy prior to documenting the approval or denial to ensure that you are the correct approver. | D-204-3 |
| ATF Backdated SA (After the fact Backdated Service Authorization) | Any VR staff | A case note entered by VR staff member that is requesting, approving, or denying a request to issue a backdated SA. RequestThe “Add to Topic” for a request includes the specific good or service and the purpose of the case note, such as “Training ATF SA Request” or “Medical Services ATF SA Request.The case note content must include the following: * what is being requested (include specific good or service, provider, and anticipated dates of service);
* circumstances supporting the request; and
* name and job title of requester.

**TIP:** Verify the required management approval level per applicable policy prior to documenting the request to ensure that it is routed to the correct approver in a timely manner.Approval or DenialThe “Add to Topic” for an approval or denial includes the specific good or service and the specific decision (“approved” or “denied”), such as “Training ATF SA – Approved.”The case note content must include the following:* the parameters of the approval or denial (include specific good or service, provider, and when applicable, the date range of the approval);
* type of review completed in TxROCS (if applicable); and
* name and job title of staff making decision.

**TIP:** Verify the required management approval level per applicable policy prior to documenting the approval or denial to ensure that you are the correct approver. | D-204-2 |
| Approval Request | Any VR staff | A case note or series of case notes entered by the VR staff member requesting an approval.The “Add to Topic” for a request should include the specific good or service, such as “Out-of-state Training.”The case note content must include the following: * what is being requested (include specific good or service, provider, and anticipated dates of service);
* circumstances supporting the request; and
* name and job title of requester.

**TIP:** Verify the required management approval level per applicable policy prior to documenting the request to ensure that it is routed to the correct approver in a timely manner. | E-200 |
| Approval Response | Any VR staff | A case note entered by VR staff member that is approving or denying the request. The “Add to Topic” for an approval or denial should include the specific good or service and the decision (“approved” or “denied”), such as “Out-of-state Training – Approved.”The case note content must include the following:* the parameters of the approval or denial (include specific good or service, provider, and when applicable, the date range of the approval);
* type of review completed in TxROCS (if applicable); and
* name and job title of staff making decision.

**TIP:** Verify the required management approval level per applicable policy prior to documenting the approval or denial to ensure that you are the correct approver. | E-200 |
| Assessing & Planning | Any VR staff | An optional case note that can be used to record information that will be used to create the comprehensive assessment case note or information that adds additional details that support the decisions that are made as the case is moved through the VR process. A case note or series of case notes that shows how the assessing and planning activities:* provided information on the customer's disability (including a review of existing records, when available, and a review of new assessments, when necessary);
* resulted in the identification of the customer's strengths, resources, priorities, concerns, abilities, capabilities, and interests;
* resulted in the identification of the customer's potential employment goals;
* led to the making of decisions that support the goals, objectives, and services identified in the customer's IPE;
* led to the customer's participation in informed choice;
* led to the development of the plan for contacting the customer.
 | B-300B-400 |
| Attempt 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-504-9B-605C-102-1C-310-4 |
| ATU (Assistive Technology Unit) | ATU staff use only | Assistive Technology Unit (ATU) staff enters a case note or series of case notes that include:* AT evaluation scheduling
* Special customer considerations
* AT demonstration details
* AT evaluation summary
* AT equipment recommendations
* training services progress
* technical advice
* other information that support customers
 | C-202 |
| CCRC (Criss Cole Rehabilitation Center) | CCRC staff use only | CCRC counselors and admissions team enter a case note or a series of case notes that include:* service authorization approvals
* counseling and guidance
* general updates
* training progress notes
* tour reports
* admissions process updates
 | C-500 |
| Case Transfer | Any VR staff | A case note that provides relavent details of all case transfers, including * date of request;
* name of person making the request (including job title of requestor, if VR staff);
* reason the case is being transferred;
* details associated with required steps of transfer; and
* confirmation that customer was notified of transfer.

**TIP:** Update the file location in RHW once the case is transferred.  | B-206-1C-1308D-304 |
| Closure | VR counselor use only | A case note or series of case notes that describes:* the reason the case was closed;
* the circumstances that led to the decision to close the case; and
* how the case meets the criteria required for closure.
 | B-600 |
| Comprehensive Assessment | VR counselor use only | A case note that describes:* Summary of records of disabilities and related impediments to employment;
* Customer’s adjustment to disability;
* Services recommended that will address specific functional limitations;
* Assessment of rehabilitation technology needs;
* Justification for selected employment goal;
* Services that are needed to achieve the employment goal;
* Available resources and comparable benefits;
* Independent living skills (including transportation and travel capabilities and resources);
* Any relevant legal issues;
* Description of customer involvement and informed choice in the selection of services, providers, and the employment goal;
* Educational and vocational history and goals;
* Justification for planned frequency of contact;
* Justification for frequency of counseling and guidance (required after July 1, 2019);
* Explanation of customer contribution to planned services (if required); and
* Any other factors that may impact participation in services.

If a required topic is not assessed, document the reason in the case note for the comprehensive assessment.When relevant, the case note may also include information about:* a customer's work tolerance;
* a customer's ability to acquire specific job skills;
* a customer's patterns of work behavior;
* the additional medical or psychological evaluations needed to determine the nature and scope of services;
* the vocational and psychological assessment completed by the VR specialist;
* functional assessments conducted in a trial work setting; and
* any additional assessments needed to determine:
	+ the best job placement; or
	+ the support services to be provided through supported employment services.

**TIP**: If assessing and planning case notes were used to record detailed information that is part of the comprehensive assessment, it is appropriate to refer to those specific case notes by case note title and date rather than repeating the information in the comprehensive assessment case note.  | B-400 |
| Consultation/Review | VR staff member that is providing formal consultation or review of a case | A case note that includes::* the parameters of the consultation including specific good or service, provider, the date range of service (when applicable), and specific recommendations;
* type of review completed in TxROCS (if applicable); and
* name and job title of staff providing consultation.

The “Add to Topic” for an consultation should include the specific good or service, such as “Hearing Aids.”**TIP:** Do not use this topic for approvals. | E-200 |
| Contact | Any VR staff | A case note or series of case notes that documents all contacts between any VR staff member and the* customer;
* customer’s representative;
* legal guardian; or
* others with direct involvement or information about customer’s participation in VR services.

**TIP:** Do not use this case note topic for contacts with providers or vendors.Each case note includes a summary of* relevant conversations,
* observations,
* decisions, and
* actions that support the customer's progress and informed choices.

**TIP**: VRC’s should always document a contact as a C&G contact IF C&G is provided during any part of the contact. Counseling and guidance is a “contact”, but should be documented using the C&G case note topic.**TIP:** Contacts include face to face conversations, telephone contacts, and written or electronic communications.  | B-504-9 |
| Contact – Provider/Vendor | Any VR staff | A case note or series of case notes that documents all contacts between any VR staff member and any provider of VR goods or services. Each case note includes a summary of* relevant conversations,
* observations,
* decisions, and
* actions taken or needed as a result of the contact.
 | Numerous references throughout VRSM |
| Correction | Any VR staff | A case note that briefly describes a correction to previously entered content in RHW. This can include data correction requests or making a notation of information that was noted incorrectly in a previous case note. When applicable, the case note should include the date and case note topic of the original case note that needs to be corrected.  | NA |
| 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.

**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**: When counseling and guidance is provided during the completion of the joint annual review or when completing an IPE amendment, the compliance and quality criteria for counseling and guidance must also be met and clearly documented for this to count as a counseling and guidance case note for the purpose of a case review.  | C-100 |
| Deafblind | DB specialist use only | The deafblind specialist writes a case note or series of case notes to document customer contacts and other pertinent details. Case notes may include: * evaluation findings
* initial recommendations and rationale
* recommendations/evaluation updates as needed
* any contacts or contact attempts
* consultations with customers (concerns, resource or advocacy information)
* staffing between Deafblind specialists and VR staff
* coding updates
* service completion (Successful or Unsuccessful)
* rationale for services not accepted
 | C-425 |
| Diabetes Ed. (Diabetes Education) | DE Specialist use only | The diabetes program specialist writes a case note or series of case notes to document customer contacts and other pertinent details. Case notes may include:* Services in evaluation and training
* diabetes education recommendations
* diabetes training on equipment
* diabetes education referrals/resources
 | C-703-34 |
| 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.The case note must include:* brief description of the customer’s disabilities (relevant history and current treatment);
* a description of the functional limitations and their impact on employment, education, and independence;
* a record of the customer's perception of problems or issues related to his or her disabilities and need for services;
* the customer’s educational and work history;
* the customer’s knowledge, skills, and abilities;
* the customer’s resources and comparable benefits (or the need to apply for benefits);
* information about the customer’s SSI or SSDI status (including verification of benefits or a note about the need to verify benefits);
* the VR counselor’s observations throughout interview; and
* a statement of the next actions needed to move the case through the VR process.
 | B-200 |
| Disaster Victim Status | Any VR staff | A case note or series of case notes that provides the following information to confirm RHW coding as a disaster victim: * how the customer was directly impacted by the disaster?
* what services are needed, because of the disaster?

**TIPS:** A customer could have been affected by the disaster in several ways including:* The storm and resulting floods impacted their homes, families, and/or community supports.
* People were displaced or had their living situation affected.
* They lost their jobs or are temporarily unemployed due to the damages caused by the disaster.
* Equipment, tools, uniforms or other items VR provided were lost or damaged.
* Vendors and local businesses upon whom they depend for medical services, education, and other training and supplies suffered disruptions.

Customers may have been affected regardless of where they are currently living. There are customers who were displaced and are staying with friends/families in other areas of the state or who have subsequently moved to other areas of the stateand we need to appropriately identify these individuals as disaster victims in RHW, as well.  | NA |
| EAS (Employment Assistance Services) | EAS staff use only | Employment Assistance Services (EAS) staff are responsible for entering case notes for any activity they provide for customers.  The only actual formal item to go into a case note is the Initial EAS Consultation report.  This is copied and passed into the actual SR which then carries over into a case note via RHW.The EAS staff documents EAS services in a case note when an SR is delegated to EAS.  The following are level 4 specs for EAS services that EAS should be documented in a case note in RHW:* Assistive Technology Purchase Plan
* Assistive Technology Troubleshooting
* Baseline Computer Skills Assessment for Training Recommendations
* Equipment/Software Installation Information Research (describe)
* Initial Consultation
* Job Retention Services
* Loaner Equipment
* Post Training Assessment
* Refurbish/Issue Equipment
* Technical Support Specialist Services

These are outlined on EAS Intranet site at: <https://intra.twc.texas.gov/intranet/vrs/html/employment-assistance-services.html> | C-1008 |
| Eligibility (including level of significance) | VR counselor use only | A case note or series of case notes that describes the information that supports how each eligibility criterion is met:1. physical or mental impairment;
2. substantial impediment to employment;
3. customer requires VR services to prepare for, secure, retain, advance in, or regain employment; and
4. presume that the customer can have a goal of an employment outcome.

For Supplemental Security Income (SSI) or Social Security Disability Insurance (SSDI) cases that are presumed eligible, document in a case note* statement of the presumption of eligibility;
* the reported disability; and
* documentation used to verify SSI/SSDI status.

For cases involving SSI or SSDI and that are not immediately presumed eligible for VR services, document in a case note clear justification for the delay in eligibility determination. **Level of Significance** –Document the level of significance of the case as a stand-alone case note or as part of a case note for eligibility. * A case note that describes how the customer's disability affects his or her functional capacities and meets the other criteria for establishing the disability's level of significance; or
* A completed [VR1390, Checklist for Determining Significance of Disability](https://twc.texas.gov/forms/index.html). If the VR1390 is used, meet the documentation requirement by also completing a case note in RHW that the form was completed.
 | B-300 |
| Employment |  | A case note that provides relavent details related to the employment status of the customer. This includes documentation of changes throughout the life of the case and also includes verification of employment for closure. When documenting verification of employment for closure, the case note must include: * method used to verify the customer's employment; and
* name of the VR staff member who verified employment.

If direct contact was made with the place of employer, document the name of the individual who verified the customer's employment (for example, name of the manager or the customer's name if the VR counselor spoke to him or her directly).If VR staff observed the customer at the place of employment, document the date and time of the observation.**TIP:** Employment must be verified on the same day that the case is closed successfully. Do not use historical information to verify current employment.  | B-404-1B-402B-603-1B-603-2B-603-5B-603-6 |
| Extension of Time for Eligibility | VR counselor use only | A case note that describes* the reasons that an extension of time is required, and
* that the customer is in agreement with the extension of time.

**TIP:** When these details are included in the comments section of the EOT for Eligibility page in RHW, which creates a system generated case note, an additional case note is not required. | B-303-2 |
| Extension of Time for IPE | VR counselor use only | A case note that describes* the reasons that an extension of time is required, and
* that the customer is in agreement with the extension of time.

**TIP:** When these details are included in the comments section of the EOT for Eligibility page in RHW, which creates a system generated case note, an additional case note is not required. | B-503-1 |
| IPE/ILP Amendment  | VR counselor or IL staff use only | A case note that describes:* review of financial information and BLR requirements;
* review of each section of the existing plan or amendment;
* progress in achieving the identified goals (including review of intermediate goals and educational goal);
* the reason for the amendment;
* the nature and scope of the changes, and
* a description of how informed customer choice was included in the development of the IPE/ILP Amendment.

**TIP**: This case note is also used to document post-employment services since an IPE amendment must be completed to provide post-employment services. **TIP:** When an IPE/ILP amendment is completed, this resets the date for the next joint annual review to be completed. **TIP:** When completing an IPE/ILP amendment, it is a best practice to review all release forms and work authorization documents to ensure that they are current.  | B-500 |
| Joint Annual Review | VR counselor use only | A case note that describes:* review of financial information and BLR requirements;
* review of each section of the existing plan or amendment; and
* progress in achieving the identified goals (including review of intermediate goals and educational goal).

**TIP:** When completing a JAR, it is a best practice to review all release forms and work authorization documents to ensure that they are current.**TIP:** The education information that is under the IPE tab in RHW also needs to be updated when the IPE is reviewed or updated to capture measurable skills gains for federal reporting.  | B-500 |
| Medical Services Coordinator Info. | Medical Services Coordinator (MSC) use only | A case note or series of case notes that documents MSC case actions related to the coordination of medical services, including: * comparable benefit verification information with contact name and date;
* specific medical service coordinated, including the provider name, admission or start date of service, and number of units or days authorized;
* for surgery cases, the name of the surgery, surgeon, hospital or facility, and admission and surgery date;
* verification of discharge date, end date of service, and customer completion of service;
* a list of ancillary providers required for coordination of the primary medical service;
* customer medical complications and requests for additional services or an extension of services;
* the reason for delay in the coordination of medical services;
* the VR counselor contact information to discuss medical coordination case issues; and
* the medical provider contacts to coordinate and pay for medical services.

Use the “Add To Topic” field to customize case note titles for quick reference. For example, MSC case notes could include “Add To Topics” of* comparable benefits;
* surgery details;
* discharge details;
* service delay;
* complications; or
* purchasing.
 | C-701-3 |
| Modifications |  | <placeholder for future content> |  |
| O & M (Orientation and Mobility) | O&M staff use only | A case note or series of case notes that describes:* assessments completed with customers
* training progress reports
* service record closures
* customer contacts or attempts to contact
 | C-600 |
| Phase Adjustment | Any VR staff | A case note or series of case notes that describes:* the circumstances surrounding previous closures and the need for phase adjusting the case;
* consultation with the VR Manager, if applicable.
 | B-206 |
| PIN Reset | VR management team use only | A case note or series of case notes that describes:* an action taken; and
* the reason that the customer's PIN was reset.
 | B-204-7 |
| Purchasing | Any VR staff | Limited use for purchasing actions.**TIP:** When an SA is changed prior to authorizing payment, there must be a corresponding case note to document the change to the SA.  | D-200 |
| Purchasing Pre-review | Administrative supervisor or purchasing specialist | A case note that confirms that: * policies and procedures for type of purchase have been applied correctly;
* purchase is included in IPE, IPE amendment, or in a caes note with all service justification elements included;
* exploration and application of available comparable benefits is documented;
* BLR has been calculated and applied correctly; correct specification levels are used to create service record; and
* required consultations and approvals have been completed, when applicable.
 | D-205-2 |
| Records and Reports | Any VR staff | A case note that provides basic information about requesting and processing records or reports. Restricted Use: * Do not use for documentation specific to a SA or purchasing action (use “Purchasing” case note topic).
* Do not use when more detailed information is being documented and should be documented in a case note topic, such as “Assessing & Planning”.
 |  |
| Referral | Any VR staff |  A case note that provides basic information about referrals between vocational rehabilitation services and community resources. Do not use for referrals within vocational rehabilitation services, such as referrals to CCRC, Diabetes Education Services, EAS, VRT, Deafblind Services or other internal resources and supports.  | Numerous references throughout the VRSM. |
| Requires Special Attention | Any VR staff | Used to document behavior that could pose a threat to other employees or to providers. (Excercise extreme care when using this case note title). A specific and factual report including* the date,
* the location,
* the names and addresses of witnesses and people involved,
* what was said or done, and
* the names of those willing to testify.

If it is later determined that the customer no longer poses a threat, enter a new case note that describes the change in circumstances.**TIP:** VR staff must report incidents affecting the security of VR staff or property to VR management and, if appropriate, to the local law enforcement authority. | A-207B-213 |
| Service Justification | VR counselor use only | A case note that describes:* type of service,
* goal of service,
* specific provider,
* begin and end dates of service,
* information about available comparable benefits, and
* information about how the customer exercised informed choice.

When services are provided for family members, the service justification note must also describe:* why services are needed for a family member;
* which family member or members need the services (name and Social Security number);
* what services are needed; and
* how the services are expected to contribute to the customer's employment.

**TIP**: A service justification is not required if comparable information has already been recorded in another case note or in the customer’s IPE. | D-202-1 |
| State Office Use Only - RSA Approval – Purchase Prior Approval | State office use only | RSA approval case note entered by VR staff member that is approving or denying the request. The “Add to Topic” for an approval or denial should include the specific good or service and the decision (“approved” or “denied”), such as “Out-of-state Training – Approved”. The case note content must include the following:* the parameters of the approval or denial (include specific good or service, provider, and when applicable, the date range of the approval);
* type of review completed in TxROCS (if applicable); and
* name and job title of staff making decision.
 | NA |
| State Office Use Only - RSA Request - Purchase Prior Approval | State office staff use only | RSA approval request case note entered by VR staff member that is requesting an approval prior to purchase.The “Add to Topic” for a request should include the specific good or service, such as “Out-of-state Training”.The case note content must include the following: * what is being requested (include specific good or service, provider, and anticipated dates of service);
* circumstances supporting the request; and
* name and job title of requester.
 | NA |
|  |  |  |  |
| Trial Work  | VR counselor use only | A case note that provides a clear justification of the need for trial work as an assessment. **TIP:** There must be two or more documented trial work experiences before closing the case as “disability too significant to benefit from services”.  | B-310B-604-1 |
| TxROCS Case Review | VR staff member that is completing the case review | A case note that includes:* type of review completed in TxROCS; and
* name and job title of staff completing the review.

**TIP:** The TxROCS case review ID is a required data field when using this case note title. | D-403-2 |
| VDU (Vocational Diagnostic Unit) | VDU staff use only | A case note or series of case notes that may include:* scheduling information
* customer contact or contact attempts
* summary and recommendations of the VDU evaluation
* feedback summary
 | B-403-3C-1500 |
| VRT (Vocational Rehabilitation Teacher) | VRT use only | The VR Teacher writes a case note or series of case notes to document customer contacts and other pertinent case information. Case notes should include:  * customer assessments
* any contacts with customers
* training recommendations (include training goals in these areas: Adjustment to Visual Impairment,, Independent Living Skills, Travel Skills, Communication Skills, Vocational Skills, and Support Systems)
* training services summary (include what was taught, how was it taught, evaluation of tasks, and next actions)
* training services completion (include VR teacher and VR counselor agree with the closure)
* courtesy customer visits
* staffings between VR teacher and VR counselor.
 | C-424 |