# Vocational Rehabilitation Services Manual B-400: Completing the Comprehensive Assessment

Revised on April 1, 2020

## B-402: Gathering Information for the Comprehensive Assessment

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### B-402-1: Comprehensive Assessment Case Notes

Throughout the comprehensive assessment process, the specific details that are gathered and evaluated by the VR counselor can be entered as "Assessment and Planning" case notes.

When all the assessment information has been gathered and reviewed, the VR counselor enters a case note with the title "Comprehensive Assessment" in ReHabWorks (RHW). The comprehensive assessment case note can be amended as additional information is obtained throughout the life of the case.

The comprehensive assessment case note must include the following:

* Summary of the customer's disabilities and related impediments to employment
* Summary of the customer's adjustment to the disability
* Services recommended that will address specific functional limitations
* Assessment of the customer's needs for rehabilitation technology
* Justification for a selected employment goal
* Justification for services needed to achieve the employment goal (include justification for each service and documentation of best value for purchased goods and services)
* Available resources and comparable benefits
* Independent living skills that support the employment goal
* Any relevant legal issues
* Description of the customer's involvement in and informed choice regarding the selection of services and providers and the customer's employment goal
* Educational and vocational history and goals
* Justification for planned frequency of contact
* Explanation of the customer's contribution to planned services (if required)
* Any other factors that might impact the customer's 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.

See [E-300: Case Notes Requirements](https://twc.texas.gov/vr-services-manual/vrsm-b-400#masthead) for additional information about required RHW case notes.