# Vocational Rehabilitation Services Manual B-600: Closure

Revised June 1, 2022

#### Introduction

This chapter contains Vocational Rehabilitation (VR) policy regarding:

* successful closures; and
* unsuccessful closures.

The only VR staff that can make the decision to close a customer's case, successfully or unsuccessfully, is the VR counselor. Likewise, only the VR counselor can amend the customer's IPE to provide Post-Employment Services, if applicable. For information on Post-Employment Services refer to B-506: Post-Employment Services.

**…**

## B-603: Successful Closures

To close a Vocational Rehabilitation (VR) case successfully, the VR counselor must ensure that the following requirements are met.

The customer must:

* have received substantial VR services, as stated on the individualized plan for employment (IPE) or IPE amendment, that have had an impact on the customer's employment outcome;
* have achieved the employment outcome that is:
  + described in the current IPE or IPE amendment (the first two digits of the SOC must match);
  + consistent with the customer's unique strengths, resources, priorities, concerns, abilities, capabilities, career interests, and informed choice; and
  + meet one of the employment outcome types discussed in the Types of Employment section below;
* have maintained the employment outcome for at least 90 days after substantial services have been completed;
* be employed at closure;
* refer to B-506: Post-Employment Services
* be notified before their case is closed (refer to B-605: Customer Notification); and
* be offered or provided a copy of the brochure "Can We Talk?"

The VR counselor and customer must:

* consider the employment outcome to be satisfactory;
* inform and discuss Post-Employment Services with the customer. Refer to B-506: Post-Employment Services; and
* agree that the customer is performing well on the job.

The VR counselor must:

* in every case, update in ReHabWorks (RHW) the type of employment outcome when:
  + the customer becomes employed; and
  + the Successful Closure page is completed.

For more information on successful closure procedures, refer to [B-603-9: Procedures for Closing Cases as Successful.](https://twc.texas.gov/vr-services-manual/vrsm-b-600#b603-9) For an optional checklist on successful closure requirements before closing the case, refer to the [Successful Closure Checklist.](https://intra.twc.texas.gov/intranet/vrs/docs/vr-successful-closure-checklist.docx)

**…**.

### B-603-9: Procedures for Closing Cases as Successful

Before closing a case as successfully rehabilitated, the VR counselor completes the following actions:

1. Confirms that the criteria for closure and the conditions for successful employment have been met.
2. Reviews the case:
   1. for technical compliance and data integrity, and makes needed corrections; and
   2. to determine:
      1. that the SOC code is appropriate; or
      2. whether an amendment to the IPE is needed.
3. Reviews any open service authorizations, in-house service records, and associated financial actions needed. (Case will not close if in-house service records are open. Only the in-house specialist is authorized to close their service records.)
4. Ensures that verification of the start date of employment is documented in RHW and includes the method used in a case note. If using the primary source documentation, this must also be placed in the case file. (Refer to [B-603-1: Verifying Start Date for Closure.](https://twc.texas.gov/vr-services-manual/vrsm-b-600#b603-1))
5. Ensures that verification of wages is documented in RHW. If using the primary source documentation, this must also be placed or in the case file. (Refer to [B-603-2: Verifying Wages for Closure.](https://twc.texas.gov/vr-services-manual/vrsm-b-600#b603-2)) If using the alternate method, a case note is also required. (Refer to [B-603-4: Alternative Methods to Obtaining Primary Source Documentation.](https://twc.texas.gov/vr-services-manual/vrsm-b-600#b603-4))
6. Ensures that verification of employment is documented in a case note to include the method used. If using the primary source documentation, this must also be placed or in the case file. (Refer to [B-603-3: Verifying Employment for Closure.](https://twc.texas.gov/vr-services-manual/vrsm-b-600#b603-3))
7. Confirms that:
   1. substantial services were delivered; and
   2. 90 days have passed since the end of substantial services.
8. Ensures that agreements for extended services are still in place, when necessary.
9. Contacts the customer to discuss closure and availability of Post-Employment Services. (Refer to [B-605: Customer Notification.](https://twc.texas.gov/vr-services-manual/vrsm-b-600#b605))
10. If Post-Employment Services are needed, follows the procedures outlined in B-506: Post-Employment Services.
11. If Post-Employment Services are not needed, closes the case in RHW and notifies the customer according to the requirements in [B-605: Customer Notification.](https://twc.texas.gov/vr-services-manual/vrsm-b-600#b605)

**…**

## B-605: Customer Notification

Before closing the case, the VR counselor must inform the customer that his or her VR case is being closed. Notification may be provided in person, by phone, or in writing. The notification must include the reason that the case is being closed and the availability of Post-Employment Services, if applicable, and must be documented in a case note in RHW.

If the customer has completed an application for VR services and the VR counselor is unable to contact the customer directly for any reason, then written notification must be sent by letter or encrypted email at least 10 business before closing the case, to allow time for the customer to contact the VR counselor if there are any concerns about closing the case. The VR counselor copies and pastes the email or letter notification that was sent in a case note with the topic "Attempt to Contact." For additional details, refer to [VRSM E-300: Case Note Requirements](https://twc.texas.gov/files/partners/vrsm-e-300.docx).

If there is no response from the customer, then the case may be closed successfully or unsuccessfully.

After the closure has been processed in RHW, a closure letter is available in RHW. VR staff must email or mail the letter to the customer at the time of closure as well as offer or provide a copy of the brochure titled "Can We Talk?," which outlines the VR appeals procedure if the customer disagrees with the closure. The VR counselor must document in RHW the date and method used to provide the notification.

For information about closing a case before an application is completed refer to [B-203-3: Closing an Initial Contact in RHW](https://twc.texas.gov/vr-services-manual/vrsm-b-200#b203-3).

## B-606: Reopening a Closed Case

Consideration should be given to opening a new case if:

* the customer requires complex or comprehensive (substantial) services;
* the customer's problem regarding employment addresses a substantial impediment to employment that is new and distinct from that condition addressed in the original IPE;
* the customer has a new vocational goal that would require extensive additional training; or
* the case was closed outside of the current program year quarter.

If the customer requires only limited services to maintain, regain, or advance in employment ,consider phase adjusting the case if it is within the program year quarter that the case was closed and use post-employment services. See [B-505-3: Amending the IPE for Post-Employment Services](https://twc.texas.gov/vr-services-manual/vrsm-b-500#b505-3).

If the customer requires more complex and comprehensive (substantial) services or it is outside the program year quarter the case was closed, open a new case. See [B-203: Initial Contact](https://twc.texas.gov/vr-services-manual/vrsm-b-200#b203) and [B-204: Application](https://twc.texas.gov/vr-services-manual/vrsm-b-200#b204) to open the case in the same way as for any other applicant for services.

If the customer will be reapplying for services, the office that will be serving the customer can request the case file. The closed case file must be sent to the receiving office within three days of the request to ensure timely processing of the case.

For more information on case files and records management, see [D-300: Records Management](https://twc.texas.gov/vr-services-manual/vrsm-d-300).