# Vocational Rehabilitation Services Manual D-300: Records Management

Revised February 1, 2019

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## D-304: Transfer of Cases and Caseloads

### D-304-1: Overview of Case Transfers

A customer's case can be transferred from one caseload to another caseload for a variety of reasons, including, but not limited to:

* the customer changes permanent residence;
* staffing changes (a VR counselor leaves TWC employment or a new VR counselor is hired;
* another VR counselor can provide services that better meet the needs of the customer; or
* management determines that there is a need to transfer the case.

A case file must not be transferred when a customer temporarily moves outside of the service area to:

* attend training;
* live in a supportive residential facility (sometimes referred to as a halfway house); or
* participate in services from a comprehensive rehabilitation center other than Criss Cole Rehabilitation Center;
* participate in other planned services outside of the service area.

For more information on the transfer of cases for VR customers who are attending Criss Cole Rehabilitation Center, refer to VRSM C-503-2: Referrals to the Training Program.

A request for case transfer can be made by the customer either verbally or in writing.

The request can be submitted to:

* the VR counselor of record; or
* any TWC-VR office.

The VR counselor or office receiving the request for transfer must:

* document the request in a case note in RHW; and
* if necessary, notify the VR staff of the request.

When a customer is reassigned from one VR counselor to another, the customer must be notified by the current VR counselor or a rehabilitation assistant (RA) before the case is reassigned.

The notification must include:

* the date of the anticipated change; and
* the name and contact information of the new VR counselor.

If the date and contact information are not known at the time of the notification, the customer is provided with the VR Manager's contact information until information for the new VR counselor is available.

Case transfers must be processed in a timely manner to ensure that the transfer does not disrupt or delay the provision of services or cause undue hardship for the customer.

In all case transfers, the receiving VR counselor must contact the transferring VR counselor within five business days of receiving the customer's file to staff the case and discuss any outstanding issues.