# VR Services Manual E-300: Case Note Requirements

Revised October 1, 2021

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# Case Note Requirements

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| **Case Note Topic** | **Staff Use** | **Documentation** | **VRSM Ref.** |
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| 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. | B-205 |

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| Employment | Any VR staff | A case note that provides relevant details related to the customer’s employment status. This includes documentation of changes throughout the life of the case, verification of employment, start date, and wages for closure.  Staff will indicate in RHW the source documentation used to verify the customer’s wages for closure. If using an alternate method, then a case note is also required.  When documenting the customer’s start date for closure, include the method used in the case note. The start date is also entered in RHW.  When documenting verification of employment for closure, include the method used in the case note.  If direct contact was made with the place of employment, document the name of the individual who verified the customer's employment (for example, name of the manager or the customer's name if VR staff spoke to them directly).  **TIP:** Documentation for the verification of employment must be as current as possible, but no older than 14 calendar days. The documentation must reflect 90 days of employment after all substancial services have been completed. | B-404-1  B-402  B-603-1  B-603-2  B-603-3  B-603-4 |

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| Joint Annual Review | VR counselor use only | A case note that describes:   * review of all information captured in RHW under the following menus:   + Initial Contact;   + Application (including financial information and BLR requirements);   + Education History; and   + Plan; * 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, review all release forms and work authorization documents to ensure they are current.  **REQUIRED:** The education history page (including training information and semester/grading period pages) under the Plan menu in RHW also needs to be updated when the IPE is reviewed or updated to capture measurable skills gains and credential attainment for federal reporting. | B-505-1 |

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