# Vocational Rehabilitation Services Manual Section C-400

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## Notes on the Manual

On October 1, 2017, Texas Workforce Commission’s Blind Services Division and Rehabilitation Services Division combined to create a single designated state unit (DSU) to administer the vocational rehabilitation program for Texans with disabilities.

The combined Vocational Rehabilitation Services Manual (VRSM) was initially published on October 1, 2017. The latest update to this manual is reflected in the chapters below.

Please note that VRSM includes links to information that is intended to provide additional decision-making supports to VR staff. Some of this information may not be available to individuals who are accessing the VRSM outside of TWC's firewall. Copies of materials that cannot be accessed directly through links can be made available upon request.

Substantive revisions to the content are noted in the VRSM List of Revisions. Any printed versions may not contain the latest policy changes.

If you have any questions about VRSM content, please contact the TWC Vocational Rehabilitation Division Policy Team at state office by sending an email message to vrsm.support@twc.texas.gov.

## Manual Overview

The VR Services Manual:

* helps ensure VR customers receive quality services to assist them in achieving successful competitive integrated employment outcomes as a result of their participation in vocational rehabilitation services.;
* helps to ensure taxpayer funds are spent wisely and each purchase paid for with public funds represents full value to the taxpayer; and
* provides published policies and procedures for maintaining compliance with federal and state laws, statutes, and rules or regulations.

The latest update to this manual is reflected in the chapters below. Any printed versions may not contain the latest policy changes.

**Vocational Rehabilitation Services Manual C-400: Training Services**

**Introduction to Training Services**

A full range of reasonable and necessary training services is available to eligible vocational rehabilitation (VR) customers when these services are necessary to prepare for, secure, retain, advance in, or regain the employment goal that is identified on the customer's individualized plan for employment (IPE). When considering providing support for training services, VR must apply:

* Best value
* Use of comparable benefits
* Required customer participation in cost of services (also referred to as BLR)
* Separation of duties, and
* Ethics and purchasing.

For more information refer to VRSM D-203: Purchasing Decisions.

**C-401: Legal Authorization**

**34 CFR §361.48(b) (6)**

"(b) Services for individuals who have applied for or been determined eligible for vocational rehabilitation services. As appropriate to the vocational rehabilitation needs of each individual and consistent with each individual's individualized plan for employment, the designated State unit must ensure that the following vocational rehabilitation services are available to assist the individual with a disability in preparing for, securing, retaining, advancing in or regaining an employment outcome that is consistent with the individual's unique strengths, resources, priorities, concerns, abilities, capabilities, interests, and informed choice:

(6) Vocational and other training services, including personal and vocational adjustment training, advanced training in, but not limited to, a field of science, technology, engineering, mathematics (including computer science), medicine, law, or business); books, tools, and other training materials, except that no training or training services in an institution of higher education (universities, colleges, community or junior colleges, vocational schools, technical institutes, or hospital schools of nursing or any other postsecondary education institution) may be paid for with funds under this part unless maximum efforts have been made by the State unit and the individual to secure grant assistance in whole or in part from other sources to pay for that training."

**Texas Workforce Commission (TWC) Vocational Rehabilitation Services Rule §856.45:**

"(a) VRD purchases vocational and other training services for customers who require additional knowledge or skills to enter employment consistent with their aptitudes and ability, and compatible with their physical or mental impairments.

(b) VRD purchases vocational and other training services through an appropriate facility. These facilities include accredited colleges and universities, certified public or private businesses, technical and vocational schools, on-the-job training, correspondence course training, tutorial training, and community rehabilitation program training.

(c) Academic training in institutions of higher education (universities, colleges, community or junior colleges, vocational schools, technical institutes, or hospital schools of nursing) is subject to the following:

(1) Academic training in proprietary vocational schools and technical institutes must be provided only in schools that are licensed or certified by the Agency on the Licensed Career Schools and Colleges Directory website, the Eligible Training Provider System website, or another regulatory agency, before including the training on the individualized plan for employment.

(2) No vocational rehabilitation funds may be used to pay for academic training unless VRD and the customer have made maximum efforts to secure grant assistance in whole or in part from other sources to pay for the training.

(3) The PELL grant, like any other comparable services and benefits, must be applied to the educational process before the expenditure of VRD funds for services under this section. Services must not be denied pending receipt of a PELL grant, but must be contingent upon the customer's making application if eligible.

(4) Academic training must be provided through public, tax-supported colleges and universities in Texas unless:

(A) a specific curriculum related to the customer's academic major is not available at a Texas public institution;

(B) academic training elsewhere is determined to be more economical; or

(C) academic training elsewhere provides specialized services needed by the customer.

(5) If the customer chooses to obtain academic training at a private college or university in Texas or at a college or university outside Texas and the provisions in paragraph (4) of this subsection do not apply, academic support must be limited to that which the customer would receive if he or she attended a state-supported college or university in Texas, unless the customer is a recipient of Social Security benefits, either Supplemental Security Income (SSI) or Social Security Disability Insurance (SSDI).

(6) A customer who is blind, does not meet the residency requirements of a particular institution, and is not eligible for tuition exemption under Texas Education Code (TEC) §54.364 may receive VRD tuition assistance based on the customer's economic need, but the payments must not exceed the tuition paid for a customer who does meet the residency requirements.

(7) Tuition and fee exemption is an exemption from payment of tuition and/or required fees normally charged by a state-supported college or university. Required fees include student services, building use, health center use, lab fees, and property deposits not reimbursable to the student. Required fees do not include optional fees.

(8) Any equipment purchased for the customer during academic training must be needed by the customer to help maintain academic success so that the customer can meet the employment outcome.

(9) Once admitted to academic training:

(A) the customer must maintain and complete a full-time course load as defined by the college or university. This requirement may be waived if:

* the customer is a graduating senior;
* the customer is an incoming freshman (first two semesters or quarters);
* the customer is a returning adult (first academic year only);
* the customer is in summer school; or
* other extenuating circumstances prevent the customer from participating in a full-time course load; and

(B) the customer is required to meet with the VR counselor at least once each semester, to submit add or drop slips as changes occur, and to provide grade slips or transcripts to the VR counselor at the end of each semester.

(d) VRD requires that each customer who is provided with vocational or other training services by VRD apply for financial assistance where reasonably available. This assistance can include federal, state, or local grants-in-aid and private scholarships where applicable. If the customer has not done so before the time of application for vocational rehabilitation services, the VR counselor assists the customer in doing so.

**C-402: Types of Training Services**

VR services are available in several ranges and training environments. Additionally, many levels of trainings are available to serve the needs and abilities of VR customers.

**C-402-1: Range of Services**

The range of training services include the following:

* Academic training
* Vocational training and technical training
* Credential specific training
* Work Readiness
* Apprenticeship opportunities
* Work Experience
* Project Search
* Adult Basic Education
* Texas Confidence Builders

**C-402-2: Training Environments**

Approved training environments include the following:

* Community colleges
* State colleges
* Technical colleges
* Public universities
* Health-related institutions
* Private postsecondary institutions
* On-the-job and registered apprenticeship sites
* Specialized training providers that are approved by Texas Workforce Commission Vocational Rehabilitation Services (TWC VR)

The Criss Cole Rehabilitation Center is also an approved training institution. For more information, refer to the Criss Cole Rehabilitation Center Policy Manual found on the Criss Cole Rehabilitation Center Intranet page.

**C-402-3: Levels of Training**

Various levels of training are available, including the following:

* Secondary school diploma
* Secondary school equivalency
* Certificate of successfully completed individualized education plan
* Work readiness
* Vocational adjustment
* Skill-specific training
* Training-specific credentials
* Certificate
* Associate degree
* Bachelor's degree
* Master's degree
* Doctorate

The VR counselor can consider advanced training in science; technology; engineering; mathematics, including computer science (also referred to as STEM occupations); medicine; law; or business as well as other fields in which there is a specific vocational outcome that requires an advanced degree when the customer can meet minimum standards to be accepted in the program.

VR is the payor of last resort, see VRSM C-406-1: Payer of Last Resort.

**C-403: Computerized Criminal History Search for Training**

When participation in training or eligibility for a license and/or employment in an occupation requires that the customer pass a computerized criminal history (CCH) search, the CCH must be performed before including the training or employment in the customer's IPE. For more information about CCHs, refer to VRSM B-405: Computerized Criminal History Checks.

VR cannot support an IPE goal or related services when the customer does not meet the legal requirements of the associated employment outcome.

**C-404: VR Counselor Responsibilities**

The VR counselor provides ongoing support through regular counseling, guidance, and help with coordinating access to necessary supports throughout the life of the case. This can include assisting the customer in applying for other types of assistance such as federal aid.

If a counselor has determined that an exception will facilitate a customer's progress and there is not an approval exception listed in policy, counselors are encouraged to staff the request through their chain of management to the Deputy Division Director for Field Services for consideration. VRSM clearly states when no exceptions are allowed.

**C-404-1: Informed Choice and Training Services**

When there is an expressed desire or need for the customer to participate in training services to reach an identified vocational goal, the VR counselor works with the customer through the process of informed choice to explore a variety of options. This must be documented clearly in a case note or series of case notes in RHW as part of the assessing and planning process to complete the comprehensive assessment. For more information on roles and responsibilities in this process, refer to VRSM B-102: Informed Choice.

**C-404-2: Counseling and Guidance for Training Participants**

The VR counselor must provide counseling and guidance that emphasizes the importance of the customer's participation in and commitment to successful completion of training and the achievement of the employment outcome.

Counseling and guidance for training participants are provided, at a minimum:

* before the beginning of any training period;
* once during each semester or training period (to check the customer's progress); and
* at the end of each semester or training period (to check grades and to plan for the next semester or training period).

When appropriate, VR counselors provide counseling and guidance on opportunities for advanced training in science, technology, engineering, mathematics, computer science, medical, legal, and business occupations. (Science, technology, engineering, and mathematics are referred to as "STEM" occupations.)

For more information about counseling and guidance requirements, refer to VRSM C-100: Counseling and Guidance.

As part of the counseling and guidance process, VR counselors provide information on available information, resources, and supports that will help the customer make an informed choice and succeed in services. For more information refer to VRSM D-203-1: Informed Customer Choice.

**C-404-3: Evaluating Training Progress**

Each semester or training period, the VR counselor reviews the following, as appropriate:

* The customer's grades or progress report, but does not delay services when grades cannot be obtained before registration for the next semester or grading period
* The customer's degree plan and the progress made to reach the training goal
* Financial aid and tuition bill
* All courses the customer plans to take during the next semester or training period to ensure they are a part of the customer's required coursework.

The customer must maintain satisfactory training progress as defined in VRSM C-407-3: Satisfactory Training Progress. If the customer struggles to maintain satisfactory training progress, the VR counselor reviews the customer's use of available resources and supports, such as tutoring, accommodations, and assistive technology, to see if the customer could improve the use of available resources and supports.

**C-405: Financial Aid and Comparable Benefits**

Comparable benefits and required customer participation in the cost of services must be applied to the cost of all training services before VR funds are used.

The customer must contact the school and apply for financial aid. No VR funds can be used to pay for training until VR and the customer have made maximum efforts to secure grants and/or other assistance to pay for the training. Verification of application for available financial aid and/or verification of financial aid award must be included in the customer's case file.

The following comparable benefits options can be selected to document the use of comparable benefits when service records, IPEs, and Closure Services pages are developed in RHW:

* Disability services offices on college and university campuses
* Educational service center
* Federal student aid (such as Pell Grants, Supplemental Educational Opportunity Grant (SEOP), and work-study)
* Intellectual and developmental disabilities agencies
* Other state agencies
* Other VR state agencies
* Scholarship
* Tuition waiver (non-blind, non-deaf)
* Tuition waiver–Blind
* Tuition waiver–Deaf
* Tuition waiver–Foster Care
* Veteran's Administration
* Waiver programs—MDCP In-Home, CLASS & Family Support Class
* Other entitlement programs

For more information, refer to VRSM D-203-3: Use of Comparable Services and Benefits; VRSM C-405-2: Pell Grant; and VRSM D-203-4: Customer Participation in the Cost of Services.

**C-405-1: Free Application for Federal Student Aid**

The [Free Application for Federal Student Aid (FAFSA)](https://studentaid.gov/h/apply-for-aid/fafsa) is a form that can be prepared annually by current and prospective students (undergraduate and graduate) in the United States to determine eligibility for student financial aid. All customers must complete the FAFSA. If the institution does not accept federal financial aid, the customer must complete the institutions financial aid application to receive VR funds for training and related expenses.

**C-405-2: Pell Grant**

The Pell Grant and other comparable benefits are applied to the cost of tuition, fees, and other educational expenses before any VR funds can be used. No exceptions are permitted to the use of the Pell Grant. If the Pell Grant is greater than the tuition and fees owed by the customer, the remaining funds should be applied to the cost of other educational expenses, such as books, supplies, room and board, and transportation, under the terms of the grant.

Student financial assistance, such as a loan that requires repayment or scholarships that are not based on student income, are excluded from the financial aid requirement.

**C-405-3: Defaulted Student Loans**

If the student has defaulted on a Guaranteed Student Loan, the student is denied a Pell Grant and other forms of financial aid. Before receiving VR funds for training, the customer must:

* initiate the process of getting the loan out of default; and
* provide written documentation, such as copies of correspondence, to confirm that he or she has initiated this process.

For more information, refer to The Federal Student Aid website for "[Getting Out of Default](https://studentaid.gov/manage-loans/default)."

**C-405-4: Tuition and Fee Waivers**

Students who are eligible for a tuition waiver are exempt from paying tuition and fees for any state-supported college or university in Texas. A waiver includes exemption from all required fees and charges, except for:

* fees or charges for lodging;
* costs of boarding and/or clothing; and
* refundable deposits.

For more information about these tuition waivers, refer to  [College for All Texans: Financial Aid](http://www.collegeforalltexans.com/apps/financialaid/tofa.cfm?Kind=W).

The 62nd Texas Legislature, Regular Session (1971), established the tuition waiver (also referred to as "tuition exemption") program to help Texas residents who are deaf or blind to receive the benefits of higher education in publicly funded colleges and universities. For more information about these tuition waivers, refer to  [College for All Texans: Types of Financial Aid—Exemptions—Blind/Deaf Student Exemption Program](http://www.collegeforalltexans.com/apps/financialaid/tofa2.cfm?ID=547) and refer to the additional details below.

**C-405-5: Deafness Tuition and Fee Exemption**

Customers who are severely hard of hearing or deaf who request academic training must:

* be referred to the Health and Human Services Commission (HHSC) Office for Deaf and Hard of Hearing Services (DHHS); and
* complete [HHSC Form 3900, Application for Certificate of Deafness for Tuition Waiver](https://hhs.texas.gov/sites/default/files/documents/laws-regulations/forms/3900/3900.pdf) .

For more information, go to [Texas Health and Human Services Deaf and Hard of Hearing](https://www.hhs.texas.gov/services/disability/deaf-hard-hearing).

**C-405-6: Blindness Tuition and Fee Exemption**

Individuals who are legally or totally blind and meet residency requirements for the college or university are exempt from paying tuition and fees for state-supported colleges and universities in Texas. An individual does not have to be a VR customer to receive a tuition and fee exemption.

The VR counselor provides the individual with a copy of Form VR3119, Certification of Blindness, certifying that the individual is legally or totally blind.

A completed Form VR3119, Certification of Blindness, is distributed as follows:

* The original is given to the customer; and
* A copy is placed in the appropriate file (the customer's VR file or the college-tuition-exempt file for non-VR customers).

It is the responsibility of the individual requesting the waiver to:

* submit documentation of blindness to VR;
* submit a Certificate of Blindness to the educational institution;
* provide proof that he or she meets the institution's entrance requirements; and
* follow the institution's procedures regarding tuition exemption.

If the individual is a VR customer, the information should be readily available in the customer's case file.

To meet the eligibility for tuition exemption as indicated in TEC §54.205, the individual must:

* be a resident of Texas as defined by the Texas Higher Education Coordinating Board;
* be a high school graduate or have received a GED;
* present a letter of recommendation from the principal of the high school attended, from a public official, or from another responsible person who knows the blind individual; and
* present a self-written statement that:
* explains his or her purpose in pursuing higher education; and
* indicates the certificate or degree program to be pursued, or the professional enhancement anticipated from the course of study for that certificate or degree program.

If a VR customer is legally or totally blind but is not eligible for tuition exemption because he or she does not meet the state-supported school's residency requirements, VR can pay for tuition and fees at a public in-state college or university, not to exceed the Texas-resident tuition rate.

If the individual is not a VR customer, the individual must present visual diagnostic information in person or by mail, confirming legal or total blindness.

Eye exams from an optometrist, an ophthalmologist, or a low-vision specialist meet this requirement. VR does not pay for a diagnostic exam for the sole purpose of obtaining this record. The VR counselor does not use a medical consultant if medical records do not clearly document legal blindness.

It is recommended that the VR counselor meet with the individual in person so that the VR counselor can determine whether the individual needs other VR services. Travel funds are not authorized solely for certification for tuition exemption.

**C-406: Purchasing Training Services**

A service authorization (SA) is the only valid means by which VR can authorize the purchase of goods and services on behalf of VR customers.

Use of a service authorization ensures that the:

* required approvals and consultations have been obtained;
* appropriate funds have been encumbered;
* necessary contracts are included, when applicable; and
* additional instructions, guidance, and other necessary information is given to the provider.

For general information about policies and procedures for purchasing all goods and services, refer to VRSM D-200: Purchasing Goods and Services.

**C-406-1: Payer of Last Resort**

VR is the payer of last resort. Comparable benefits and required customer participation in the cost of services must be applied to the cost of all training services before VR funds are used. For more information, refer to VRSM D-203-3: Use of Comparable Benefits.

Because VR uses tax revenue for case service expenditures, VR has the additional obligation to purchase the least expensive services that meet the vocational needs of the customer. For more information, refer to VRSM D-203-2: Best Value Purchasing.

The following are sources of comparable services and benefits:

* US Department of Veterans Affairs
* Pell Grant
* Disability services offices on college and university campuses
* Waivers
* Other entitlement programs

**C-406-2: Supplemental Security Income and Social Security Disability Income Recipients**

Customers who are eligible for Supplemental Security Income (SSI) or Social Security Disability Income (SSDI) because of a disability are exempt from required participation in the cost of training services that are:

* associated with basic living requirements (BLR) calculations; and
* associated with payment limitations for universities, colleges, or technical institutions for tuition, fees, and other training-related expenses.

Exceeding the maximum tuition and fees amounts set by policy does not require VR management approval if the customer is a SSI or SSDI recipient.

SSI and SSDI recipients are not exempt from the requirement to use comparable services and benefits for all services, such as tuition exemptions, federal financial aid that does not require repayment, or other free or low-cost services that are readily available to the customer. Refer to VRSM D-203: Purchasing Decisions for more information.

**C-406-3: Repeating Courses**

VR usually does not pay for courses that must be repeated. If VR funds are used to pay for a course more than twice, the VR counselor must consult with the VR Supervisor, and the justification for VR support of the repeated course must be clearly documented by the VR counselor in an RHW case note.

Counseling and guidance should be provided to ensure that the customer is using available supports and is complying with customer responsibilities as defined on the IPE or IPE amendment.

**C-406-4: Withdrawals and Refunds**

When a customer withdraws from a course or VR terminates services before the customer completes the course, the VR counselor pursues a refund per the school's policy.

**C-406-5: Creating Service Authorizations for Training Services**

An SA is the only valid means by which VR can authorize the purchase of goods and services on behalf of VR customers.

**Encumbrance Period**

VR limits the number of encumbrance periods for training and related services to two semesters, trimesters, quarters, or other school registration periods. For example, the VR counselor might have issued service authorizations for the fall semester and must issue service authorizations for the spring semester when the customer needs to register for the spring semester before the end of fall semester. However, the IPE must include the entire time frame that is required for the customer to complete the approved training that is needed to reach the vocational goal. For more information about developing the IPE, refer to VRSM B-505: Content of the IPE.

**Prorating Costs When Crossing Fiscal Years**

For additional information about creating service authorizations for tuition and fees, including information about crossing state fiscal years and prorating services refer to VRSM D-212: Creating the Service Authorization and D-212-2: Crossing State Fiscal Years.

**C-407: Customer Responsibilities**

Successful completion of training requires active involvement by the customer in all aspects of the VR service and training. This includes:

* providing all required documentation;
* completing all admission and registration procedures required by the training institution;
* maintaining satisfactory training progress, as defined by the training institution; and
* maintaining satisfactory progress with VR services as defined in the customer's IPE.

VR requires that each customer who is provided with training services apply for available financial assistance such as federal, state, or local grants and private scholarships.

A service authorization is the only valid means by which VR can authorize goods and services with VR funds. For more information on purchasing services and procedures, refer to VRSM D-204: The Purchasing Process.

**C-407-1: Required Documents**

A customer who is participating in training must provide the VR counselor with the following documentation, which is kept in the customer's paper case file:

* Verification of application for available financial aid and/or verification of financial aid award
* A copy of the individualized degree plan or comparable documentation as provided by the training institution
* A course schedule for each training period
* Documentation that shows progress for each training period, such as a report card, grade report, or transcript
* Written documentation of added and dropped courses
* Written justification for a change in the major course study
* Documentation of the appropriate certificate of completion

For information on Measurable Skill Gains documentation requirements, refer to VRSM A-500: Measurable Skill Gains. For information on Credential Attainment documentation requirements, refer to VRSM A-600: Credential Attainment.

When a course of study is changed more than twice, approval from the VR Supervisor is required before VR continues sponsorship of costs associated with training.

**C-407-2: Participation in VR Services and Training**

The following information is based on the Texas Workforce Commission Vocational Rehabilitation Services Rule §856.45. No exceptions other than those described below can be made to the following policies and procedures.

To demonstrate customer participation in VR services, the customer must:

* enroll in courses and electives that are included in the institution-approved degree or training plan;
* contact the VR counselor before adding or dropping classes; this includes taking an incomplete for a course. If the course schedule is changed, then payments for reader services, books, tools, supplies, transportation, room and board, and other supports must be recalculated;
* maintain and complete a full-time course load as defined by the training institution, unless the customer is:
	+ a graduating senior (from a college or university);
	+ an incoming freshman (first two semesters or quarters);
	+ a returning adult student (first academic year only);
	+ attending summer school, mini-semester; or
	+ subject to other documented extenuating circumstances, such as disability-specific limitations, that prevent the customer from participating in a full-time course load;
* communicate with the VR counselor, teachers, and the training provider's disability office about problems or accommodation needs;
* use the services and supports that are available through the training provider's disability office, as needed;
* maintain consistent enrollment and attendance in regular semesters; and
* maintain satisfactory progress, as defined in VRSM C-407-3: Satisfactory Training Progress.

**C-407-3: Satisfactory Training Progress**

Satisfactory training progress is defined by the training provider and included on the customer's IPE. The customer must meet satisfactory training progress requirements for each semester or grading period to receive VR funding for subsequent semesters or grading periods.

The VR counselor can make exceptions to this requirement for no more than one semester or grading period and on a case-by-case basis if justification for the exception is documented clearly in a case note. If a customer fails to meet satisfactory training progress for two or more consecutive semesters or grading periods, the VR Supervisor must review and approve continuing with, or resuming, training and related services or supports.

**C-408: Training at a College or University**

Customers can attend an accredited public or private (independent) college or university and earn a certificate or an associate, bachelor's, master's, or doctoral degree when the customer can meet minimum standards to be accepted in the program.

**C-408-1: Assessment for Training at a College or University**

Customers must meet the minimum standards for acceptance to a college or university that is sponsored by VR; the college or university must be identified as the provider for the service in the customer's IPE or IPE amendment.

Before completing the IPE, the VR counselor assesses the customer's potential to benefit from and successfully complete academic training. The assessment includes a review of the customer's:

* previous academic achievements (grades, degrees, and certificates);
* existing or new cognitive evaluations;
* need for, or history of, remedial classes;
* independent living skills;
* ability to manage the related time demands;
* need for assistive technology or accommodations in a training environment; and
* need for non-VR supports for participation.

For more information about completing the comprehensive assessment, refer to VRSM B-400: Completing the Comprehensive Assessment.

**Private or Out-of-State Colleges or Universities**

Training must be provided through public colleges and universities in Texas unless:

* a specific curriculum related to the customer's course of study is not available at a Texas public institution;
* academic training elsewhere is determined to be more economical, after all costs are considered; or
* academic training elsewhere provides specialized services needed by the customer that are not available at a Texas public institution.

When a customer chooses to attend a private (independent) or an out-of-state college, technical or state college, university, or health-related institution, even though a comparable public training institution is available in Texas, tuition and fees paid by VR cannot exceed in-state tuition and fees. Exceptions to the limitations for tuition and fees require justification and approval by the VR Supervisor.

Customers that are SSI/SSDI recipients are exempt from limitations and required participation in the cost of training services. Refer to VRSM C-406-2: Supplemental Security Income and Social Security Disability Income Recipients.

For more information refer to VRSM C-409: Maximum Payment for a Training at a College or University.

For approval requirements, see VRSM D-206-3: Out-of-State Purchases and VRSM C-409-5: Private or Out-of-State Training at a College or University.

**Evaluating Previous Training Performance**

If the customer's history includes a record of marginal or poor performance in previous training, before committing to a full training program in the customer's IPE, the VR counselor should consider obtaining additional diagnostic evaluations or other types of assessments, if comparable documentation is not available, to develop a remedial plan and determine whether the customer is likely to be successful (with supports).

Examples of poor training performance include:

* excessive and/or repetitive class withdrawals or drops;
* poor attendance; and
* failing grades.

**C-408-2: Developmental Courses at a College or University**

If a customer requires developmental courses (sometimes called remedial courses) to strengthen academic skills, the VR counselor must consider best value and other comparable benefits to provide this training, including:

* adult basic education programs;
* special training;
* tutorial programs; and/or
* developmental courses provided at no cost.

If comparable benefits are unavailable or impractical, VR can pay for developmental courses for a maximum of two semesters or grading periods.

**C-408-3: Content of an IPE for Training at a College or University**

In addition to the requirements identified in VRSM B-500: Individualized Plan for Employment and Post-Employment, an IPE that includes training services must also include:

* an employment goal that is directly associated with the sponsored training;
* the specific definition of satisfactory progress such as minimum grades requirements and attendance;
* the credit hours required for each semester or grading period;
* statements of specific customer and VR responsibilities; and
* a statement about the requirement to apply available federal financial aid (for example, the Pell Grant and other funding that does not require repayment) to the cost of training before VR funds are authorized.

The IPE must be written for the entire length of the agreed-upon training at the college or university and can be amended throughout the life of the case.

**Admission and Registration Procedures**

The customer must complete all admission and registration procedures required by the college or university. The customer completes as much as possible, with VR staff providing only minimal coaching and prompting. When needed, the level of coaching and prompting to complete these tasks should be individualized, based on the customer's unique needs and circumstances.

**C-408-4: Required Time Frames for Completion of Training at a College or University**

VR customers are expected to complete VR-sponsored training within a reasonable time and in accordance with their college or university degree plan.

VR sponsorship of academic training that exceeds the following time frames requires VR Supervisor approval as soon as it is apparent that the following time frames will be exceeded:

* An associate degree (generally 60 credit hours) must be completed within three years.
* A bachelor's degree (generally 120 credit hours) must be completed within six years (including credit hours from a junior college or community college).
* A master's degree must be completed within three years. (This does not include time to complete bachelor's degree before beginning the master's degree program.)

Timeframes for doctoral degree level training varies. Documentation must show that the customer is participating at a full-time status.

**Prorated Time Frames**

When a customer has spent time in a college or university before VR sponsorship, the VR counselor must consider the credit hours already earned that apply to the current degree plan. The required timeframes for completion are then based on the institution degree plan, which must be based on full-time enrollment, unless the full-time enrollment requirement is justified in a case note and approved. The VR counselor documents the justification for the prorated time frame in a case note in ReHabWorks (RHW) and includes the agreed-upon time frame in the customer's IPE or IPE amendment.

**C-409: Maximum Payment for Training at a College or University**

Vocational Rehabilitation (VR) may pay for training when the customer is enrolled in a public, private, or out-of-state institution. To determine the institution’s classification, refer to [College for all Texans—Degree Programs](http://www.collegeforalltexans.com/apps/degreeprograms/).

This subsection and VRSM C-412: Maximum Payment for Training at a Proprietary Institution list the maximum amounts of tuition and fees that VR is permitted to pay per semester or grading period.

#### IPE Requirements

When completing the individualized plan for employment (IPE), VR staff must not include specific rates of tuition and fees. Staff should refer to the rates as "will pay amounts per policy."

For more information on IPE and IPE amendments, refer to VRSM B-500: Individualized Plan for Employment and Post-Employment.

**C-409-1: Public Training Institutions**

VR pays the entire amount for in-state tuition and required fees at public training institutions in Texas for eligible customers after the Pell Grant, needs-based financial aid, and any required customer contributions are applied. VR pays the Texas resident tuition rate. Exceptions to exceed the Texas resident tuition rate may be granted with justification and VR Supervisor approval.

VR staff uses the College for all Texans website to verify if the public institution is one of the following:

* Two-Year Community College
* Four-Year College or University
* Technical College
* State College
* Health-Related Institution

#### Study Abroad

If study abroad is required at an in-state public college or university and there is not an option to take virtual or on-campus classes, VR pays for the entire amount of tuition and required fees.

If study abroad is required at a private or out-of-state college or university and there is not an option to take virtual or on-campus classes, VR pays up the maximum amounts as stated in policy. Refer to VRSM C-409-2: Private or Out-of-State Training Institutions and VRSM C-406-2: Supplemental Security Income and Social Security Disability Income Recipients.

VR must approve the eligible study abroad location which can be based on cost-effectiveness, best value, and value added to the customer’s training program. For information on airfare refer to VRSM C-1402-7: Airfare.

Exceptions to the requirements for study abroad require justification and approval by the VR Supervisor.

**C-409-2: Private or Out-of-State Training Institutions**

When a customer chooses to attend a private or out-of-state college, even though a comparable public training institution is available in Texas, the VR counselor:

* documents in a case note why the customer chose a private or out-of-state institution instead of a public institution; and
* follows pay the procedures in the next section to determine the maximum amount that VR may pay to the private or out-of-state institution.

Note: The VR counselor must document clearly and in detail the reason the customer chose a private or out-of-state institution when there is a comparable public in-state institution. Justification may be for reasons such as accommodations for the customer’s disability, additional support out-of-state, or any other justification for choosing a private or out-of-state institution.

Tuition and fees paid to private and out-of-state institutions may not exceed the maximum amount described in the next section unless the VR counselor justifies, and the VR supervisor approves exceptions to the limitations for tuition and fees. For customers who are eligible for Social Security Insurance (SSI)/Social Security Disability Insurance (SSDI) because of a disability, refer to VRSM C-406-2: Supplemental Security Income and Social Security Disability Income Recipients.

For approval requirements, refer to VRSM C-408-3: Content of an IPE for Training at a College or University and VRSM D-206-3: Out-of-State Purchases.

**Maximum Amounts for a Private or Out-of-State Training Institution**

To calculate the amount that VR may pay toward the cost of the customer's tuition and required fees at a private or out-of-state college, university, and training institution, the VR counselor uses the following procedure:

1. Multiply the number of credit hours the customer is taking per semester or grading period by the maximum payment amount listed in:
* VRSM [C-409-3: Private or Out-of-State Training Institutions: Two-Year College](https://twc.texas.gov/vr-services-manual/vrsm-c-400#c409-1);
* VRSM [C-409-4: Private or Out-of-State Training Institutions: Four-Year College or University](https://twc.texas.gov/vr-services-manual/vrsm-c-400#c409-2);
* VRSM [C-409-5: Private or Out-of-State Training Institutions: Technical and State College](https://twc.texas.gov/vr-services-manual/vrsm-c-400#c409-3); or
* VRSM [C-409-6: Private or Out-of-State Health-Related Institutions](https://twc.texas.gov/vr-services-manual/vrsm-c-400#c409-4).

Note: This is the maximum amount that VR may pay toward the cost of the customer's tuition and required fees at a private or out-of-state college, university, and training institution.

1. Next, calculate the amount of tuition and required fees and deduct the Pell Grant amount and the amount of needs-based financial aid that does not require repayment. From this amount, if the customer is over the basic living requirement (BLR), deduct BLR.
2. If the amount in number two is less than the maximum that VR may pay in number one, VR issues the service authorization (SA) for the amount determined in number two.
3. If the amount in number two is more than the maximum that VR may pay in number one, VR issues the SA for the maximum amount determined in number one.
4. If the amount in number two is zero, VR does not issue an SA.
5. Finally, staff must provide to the customer in writing the amount that VR will pay and the amount that is still owed to the institution. The Form VR3405, Tuition Payment Calculation Worksheet for Private or Out-of-State Training may be used to calculate the amount that VR may pay toward the cost of the customer's tuition and required fees.

**C-409-3: Private or Out-of-State Training Institutions: Two-Year College**

VR staff verifies that the private or out-of-state training institution is an established two-year college by finding its classification on the [College for all Texans—Institutions of Higher Education](http://www.collegeforalltexans.com/apps/degreeprograms/) website. Staff must verify private or out-of-state institutions by finding the school’s classification through the school’s website.

Exceptions to the limitations for tuition and fees require justification and approval by the VR Supervisor. For additional information, refer to

VRSM D-200: Purchasing Goods and Services. For customers who are eligible for SSI/SSDI because of a disability, refer to VRSM C-406-2: Supplemental Security Income and Social Security Disability Income Recipients.

As of July 2023, VR pays the maximum rate of $133 per semester hour, which includes the amount of tuition and fees at a two-year private or out-of-state college.

VR pays a maximum of $3,990 per year for certificate training at a two-year college that is not on a semester hour schedule. (The maximum amount for a college or university certificate program is based on established tuition and fee rates for enrollment in 15 credit hours for both the fall and spring semesters.)

These rates are based on one standard deviation above the average 2023–2024 college costs of tuition and fees found on the [College for All Texans](http://www.collegeforalltexans.com/index.cfm?objectid=63188B97-0C47-0020-6DBBBAD96A7DFB83)—Institutions of Higher Education website. VR reviews these rates annually in July.

**Service Records for Training at a Two-Year College**

The following ReHabWorks (RHW) specifications must be used when creating service records for training services:

* Level 1—Training—College and University [86000]
* Level 2—Training—Two-Year Community College [86000-11143]
* Level 3—Training—Two-Year Community College
* Level 4—Tuition and fees

**C-409-4: Private or Out-of-State Training Institutions: Four-Year College or University**

VR staff verifies that the private or out-of-state training institution is an established four-year college or university by finding its classification on the [College for all Texans—Institutions of Higher Education](http://www.collegeforalltexans.com/apps/degreeprograms/) website. Staff must verify private or out-of-state institutions by finding the school’s classification through the school’s website.

As of July 2023, VR pays the maximum amount of $398 per semester hour, which includes the amount of tuition and fees at a four-year private or out-of-state university.

Exceptions to the limitations for tuition and fees require justification and approval by the VR Supervisor. For additional information refer to VRSM D-200: Purchasing Goods and Services. For customers who are eligible for SSI/SSDI because of a disability refer to VRSM C-406-2: Supplemental Security Income and Social Security Disability Income Recipients.

VR pays a maximum of $11,940 per year for certificate training at a four-year college or university that is not on a semester hour schedule. (The maximum amount for certificate programs through a college or university is based on established tuition and fee rates for enrollment in 15 credit hours for both the fall and spring semesters.)

These rates are based on one standard deviation above the average 2023–2024 college costs of tuition and fees found on the [College for All Texans—Institutions of Higher Education](http://www.collegeforalltexans.com/index.cfm?objectid=63188B97-0C47-0020-6DBBBAD96A7DFB83) website. VR reviews these rates annually in July.

**Service Records for Training at a Four-Year College or University**

The following RHW specifications must be used when creating service records for training services:

* Level 1—Training—College and University [86000]
* Level 2—Training—Four-Year College or University [86000-11136]
* Level 3—Training—University—Four-Year Program
* Level 4—Tuition and required fees
* Level 3—Training - University - Graduate Program
* Level 4—Tuition and fees

**C-409-5: Private or Out-of-State Training Institutions: Technical and State College**

VR staff verifies that the private or out-of-state training institution is an established technical or state college by finding its classification on the [College for all Texans— Institutions of Higher Education](http://www.collegeforalltexans.com/apps/degreeprograms/) website. Staff must verify private or out-of-state institutions by finding the school’s classification through the school’s website.

Exceptions to the limitations for tuition and fees require justification and approval by the VR Supervisor. For additional information, refer to VRSM D-200: Purchasing Goods and Services. For customers who are eligible for SSI/SSDI because of a disability, refer to VRSM C-406-2: Supplemental Security Income and Social Security Disability Income Recipients.

As of July 2023, VR pays the maximum amount of $123 per semester hour for training at a state college and $240 per semester hour for training at a technical college, which includes the amount of tuition and fees at a private or out-of-state technical or state college.

VR pays a maximum of $3,690 per year for certificate training at a state college that is not on a semester hour schedule and $7,200 per year for certificate training at a technical college that is not on a semester hour schedule. (The maximum amount for a college or university certificate program is based on established tuition and fee rates for enrollment in 15 credit hours for both the fall and spring semesters.)

These rates are based on one standard deviation above the average 2023-2024 college costs of tuition and fees found on the [College for All Texans](http://www.collegeforalltexans.com/index.cfm?objectid=63188B97-0C47-0020-6DBBBAD96A7DFB83) website. VR reviews these rates annually in July.

**Service Records for Training at a Private or Out-of-State Technical or State College**

The following RHW specifications must be used when creating service records for training services:

* Level 1—Training—College and University [86000]
* Level 2—Training—Technical and State College [86000-11153]
* Level 3—Training—Technical and State College
* Level 4—Tuition and fees

**C-409-6: Private or Out-of-State Health-Related Institutions**

VR staff verifies that the private or out-of-state training institution is an established health-related institution by finding its classification on the [College for all Texans—Institutions of Higher Education](http://www.collegeforalltexans.com/apps/degreeprograms/) website. Staff must verify private or out-of-state institutions by finding the school’s classification through the school’s website.

Exceptions to the limitations for tuition and fees require justification and approval by the VR Supervisor. For additional information, refer to VRSM D-200: Purchasing Goods and Services. For customers who are eligible for SSI/SSDI because of a disability, refer to VRSM C-406-2: Supplemental Security Income and Social Security Disability Income Recipients.

As of July 2023, VR pays the maximum amount of $438 per semester hour, which includes the amount of tuition and fees at a private or out-of-state health-related institution.

VR pays a maximum of $13,140 per year for certificate training at a private or out-of-state health-related institution that is not on a semester hour schedule. (The maximum amount for a college or university certificate program is based on established tuition and fee rates for customers enrolled in 15 credit hours for both the fall and spring semesters.)

These rates are based on one standard deviation above the average 2023-2024 college costs of tuition and fees found on the [College for All Texans—Institutions of Higher Education](http://www.collegeforalltexans.com/index.cfm?objectid=63188B97-0C47-0020-6DBBBAD96A7DFB83) website. VR reviews these rates annually in July.

**Service Records for Training at a Public Health-Related Institution**

The following RHW specifications should be used when creating service records for training services:

* Level 1—Training—College and University [86000]
* Level 2—Training—Public Health-Related Institutions [86000-11129]
* Level 3—Training—Health-Related Four-Year Program
* Level 3—Training—Health-Related Graduate Program
* Level 4—Tuition and required fees
* Level 4—Tuition and fees

**C-409-7: Purchasing Dual Credit Courses**

Customers taking dual credit courses at a college or university must meet the same requirements established for classroom courses at that institution. For policies and procedures on purchasing dual credit courses, refer to VRSM [C-1305-14: Dual Credit Courses](https://twc.texas.gov/vr-services-manual/vrsm-c-1300#c1305-9).

**C-409-8: Graduate and other Post-University Training**

When a customer attends graduate and/or other post-university training, VR staff verifies the institution’s classification on the [College for all Texans—Institutions of Higher Education](http://www.collegeforalltexans.com/apps/degreeprograms/) website. Staff must verify private or out-of-state institutions by finding the school’s classification through the school’s website.

Public Texas training institutions are exempt from the maximum rate limitation. VR may pay for the entirety of tuition and required fees at public Texas institutions for eligible customers.

The maximum amounts VR pays to a private or out-of-state graduate or other post-university training institution are determined based on the type of institution the customer is attending. For maximum amounts, refer to VRSM C-409-4: Private or Out-of-State Training Institutions: Four-Year College or University or VRSM C-409-6: Private or Out-of-State Health-Related Institutions.

Exceptions to the limitations for tuition and fees require justification and approval by the VR Supervisor. For additional information, refer to VRSM D-200: Purchasing Goods and Services. For customers who are eligible for SSI/SSDI because of a disability refer to VRSM C-406-2: Supplemental Security Income and Social Security Disability Income Recipients.

**C-410: Correspondence and Distance Learning Courses**

Customers taking online, correspondence, or distance-learning courses from a college, university, or proprietary institution must meet the same requirements established for classroom courses at that institution. See VRSM C-409: Maximum Payment for a Training at a College or University and VRSM C-412: Maximum Payment for Training at a Proprietary Institution.

**C-411: Training from Career and Technical or Certified Schools (Proprietary Institutions)**

Career and technical or certified schools (proprietary institutions), including correspondence and internet courses, must:

* have been reviewed by the appropriate licensing entity;
* offer approved curricula; and
* hold a license to operate a career school or college.

Proprietary schools must be licensed or certified by TWC or another regulatory agency such as the Texas Department of Licensing and Regulation. To find a list of TWC licensed schools, go to <https://apps.twc.state.tx.us/CSC/directory/search.do>. To find a list of certified schools, go to the [Eligible Training Provider System](https://twc.texas.gov/partners/eligible-training-providers).

TWC can grant exemptions from licensing under TEC Chapter 132, which governs career schools and colleges. For instructions on the exemption process, see VRSM C-413: Training by Paid Instructor or Exempt Schools.

**C-411-1: Assessment for Training at a Proprietary Institution**

Customers must meet the minimum standards for acceptance to a proprietary institution that is sponsored by VR and included in the customer's IPE.

Before completing the IPE, the VR counselor assesses the customer's potential to benefit from and successfully complete training. The assessment includes a review of the customer's:

* previous academic achievements (grades, degrees, and certificates);
* existing or new cognitive evaluations;
* ability to manage the related time demands;
* need for assistive technology or accommodations in a training environment; and
* need for non-VR supports for participation.

For more information about completing the comprehensive assessment, refer to VRSM B-400: Completing the Comprehensive Assessment.

**Out-of-State Proprietary Institutions**

Out-of-state proprietary institutions that provide training to a customer must meet all the following criteria:

* The institution must be legally authorized by the state of its physical location to offer postsecondary education and award degrees.
* The institution must be accredited by a regional or national accrediting organization recognized by the US Secretary of Education under the Higher Education Act of 1965 (20 USC §1001 et seq.).
* The institution must offer in Texas only postsecondary distance or correspondence programs of instruction. (That is, there is no physical location in Texas.)

If the institution meets the criteria listed above, it must take the actions listed on the [TWC Out-of-State Distance Education Institutions](https://twc.texas.gov/partners/out-state-distance-education-institutions) page under the "TWC Requirements You Must Meet" section.

If the institution does not meet all the criteria, an explanation of both TWC's licensing and exemption processes is contained on the [TWC Career Schools and Colleges Resources page](https://twc.texas.gov/partners/career-schools-colleges-resources). Follow the [Apply for a certificate of approval](https://twc.texas.gov/partners/applying-career-school-or-college-license) link for more information.

Tuition and fees rates paid by VR cannot exceed maximum payment rates; when training is obtained in another state, payment is governed by the policies and procedures outlined in VRSM C-412: Maximum Payment for Training at a Propriety Institution.

Customers that are SSI/SSDI recipients are exempt from limitations and required participation in the cost of training services. Refer to VRSM C-406-2: Supplemental Security Income and Social Security Disability Income Recipients.

When a customer chooses to attend a private or an out-of-state proprietary school, even though a comparable training institution is available in Texas, refer to VRSM C-409-5: Private or Out-of-State Training at a College or University for documentation and payment procedure requirements.

**C-411-2: Content of an IPE for Training at a Proprietary Institution**

In addition to the requirement identified in VRSM B-500: Individualized Plan for Employment and Post-Employment, an IPE that includes training services must also include:

* an employment goal that is directly associated with the sponsored training;
* the definition of "satisfactory progress";
* the hours required for each semester or grading period;
* statements of specific customer and VR responsibilities; and
* a statement about the requirement to apply available federal financial aid (for example, the Pell Grant and other funding that does not require repayment) to the cost of training before VR funds are authorized.

The IPE must be written for the entire length of the agreed-upon training at the institution and can be amended throughout the life of the case.

**Satisfactory Attendance and Progress**

Customers attending a proprietary institution must meet the institution's requirements for attendance, progress, and grades for each grading period.

For more information on requirements, refer to VRSM C-407-3: Satisfactory Training Progress.

**C-411-3: Required Time Frames of Proprietary Institutions**

When a student is enrolled full time, VR sponsorship of training through a proprietary institution must be completed within the time frames established by the institution for full-time enrollment.

Training that exceeds time frames for completion requires approval from a VR Supervisor before further training will be sponsored with VR funds.

**Prorated Time Frames**

When a customer has spent time in a training at a proprietary institution before VR sponsorship, the VR counselor must consider the credits already earned that apply to the current curriculum and adjust the required timeframes for completion of the approved program. The required timeframes for completion are then based on full-time enrollment, unless the full-time enrollment requirement is justified in a case note and approved. The VR counselor documents the justification for the prorated time frame in a case note in ReHabWorks (RHW) and includes the agreed-upon time frame in the customer's IPE or IPE amendment.

**C-412: Maximum Payment for Training at a Proprietary Institution**

VR staff verifies that the institution is licensed or certified by TWC on the [Licensed Career Schools and Colleges Directory website](https://apps.twc.state.tx.us/CSC/directory/search.do); the [Eligible Training Provider System website](https://twc.texas.gov/partners/eligible-training-providers); or another regulatory agency website, such as the [Texas Department of Licensing and Regulation](https://www.tdlr.texas.gov/), before including the training on the IPE.

The maximum amount VR can pay for tuition and fees combined for full-time enrollment at a proprietary institution, after comparable benefits and BLR is applied, is the lesser of:

* $133 per semester hour; or
* $3,990 per year.

As of July 2023, these rates are based on one standard deviation above the averages from College for All Texans public training institutions two-year community college (college cost 2023-2024) average of tuition and fees.

Exceptions to the limitations for tuition and fees require justification, consultation with the State Office Program Specialist for Re-Entry, Work Experience & Proprietary Schools, and approval by the VR Supervisor. For additional information, refer to VRSM D:200: Purchasing Goods and Services. For customers who are eligible for SSI/SSDI because of a disability, refer to VRSM C-406-2: Supplemental Security Income and Social Security Disability Income Recipients.

**Service Records for Training at a Proprietary University**

The following RHW specifications should be used when creating service records for training services:

Level 1 - Training, Vocational Programs by Proprietary or Certified Schools - MC [86100]

Level 2 – Choose the description that matches the training

**IPE Requirements**

The IPE should not reflect specific rates but should refer to them as "will pay amounts per policy."

For more information on IPE and IPE amendments, refer to VRSM B-500: Individualized Plan for Employment and Post-Employment. For more information about previous rates, refer to the VR Services Manual List of Revisions.

**C-412-1: Out-of-State Training at a Proprietary Institution**

When a customer chooses to attend a private or out-of-state proprietary school, even though a comparable training institution is available in Texas, the VR counselor:

* documents the reason for selecting the out-of-state proprietary school that is being compared to the public training institution in a case note; and
* follows the procedures above for determining the amount that can be paid to the institution. This is the amount that VR can pay of the cost of an out-of-state institution.

Customers that are SSI/SSDI recipients are exempt from limitations and required participation in the cost of training services. Refer to VRSM C-406-2: Supplemental Security Income and Social Security Disability Income Recipients.

For approval requirements see VRSM C-411-2: Content of a IPE for Training at a Proprietary Institution and VRSM D-206-3: Out-of-State Purchases.

**C-413: Training by Paid Instructor or Exempt Schools**

Training by a paid instructor or school exempt from the TWC licensing requirement to meet a customer's individualized needs can be purchased with VR funds. For assessment considerations, content of an IPE, and required time frames, refer to VRSM C-411: Training from Career and Technical or Certified Schools (Proprietary Institutions).

**C-413-1: Legal Authorization**

TEC §132.002(b) states:

"Schools offering a course or courses of special study or instruction financed or subsidized by local, state, or federal funds or by any person, firm, association, or agency other than the student involved, on a contract basis and having a closed enrollment, may apply to the commission [TWC] for exemption of such course or courses from this chapter [TEC—Chapter 132] and such course or courses may be declared exempt by the commission where the commission finds the course or courses to be outside the purview of this chapter."

**C-413-2: Arranging for a Paid Instructor or Exempt School**

The VR counselor arranges for paid instructor training so that a customer has a chance to learn a specific work skill from a qualified individual. This training can be:

* customized to the customer's needs (for example, one-on-one);
* offered in a small-group setting; or
* through a school that has a TEC §132.002(b) exemption (see "Out of State Proprietary Institutions" in VRSM C-411-1).

**Instructor Qualifications**

The trainer and the course must be:

* approved by TWC; or
* specifically exempted in writing by TWC, based on TEC §132.002(b).

Per TWC regulation, all vocational training providers that charge a fee, including individuals that provide training, are defined as "schools."

Requests for approval to use a school that has the TEC §132.002(b) exemption require:

* consultation with the State Office Program Specialist for Re-Entry, Work Experience and Proprietary Schools; and
* approval from the Regional Director or Deputy Regional Director.

This approval is granted individually for the course and is not a blanket approval for an unlicensed school.

**Fees**

When training is obtained through a paid instructor, tuition and fees rates paid by VR must not exceed payment rates that are governed by the policies and procedures outlined in VRSM C-412: Maximum Payment for Training at a Proprietary Institution.

**C-414: Goods and Services that Support Training Services**

In addition to sponsorship of tuition and fees, additional goods and services can be included in the customer's IPE or services justification case note, as appropriate, if they are required for the customer to participate in planned training. The additional goods and services include:

* textbooks and supplies (refer to VRSM C-415: Textbooks and Supplies)
* reader services (refer to VRSM C-309: Reader Services)
* assistive technology equipment and/or software (refer to VRSM C-200: Technology Services)
* low-vision devices (refer to VRSM C-703-14: Low-Vision Services)
* vocational rehabilitation teacher services (refer to VRSM C-424: Vocational Rehabilitation Teacher)
* employment assistance specialists (refer to VRSM C-1008: Employment Assistance Specialist Services)
* training-related supplies (refer to VRSM C-415: Textbooks and Supplies)
* transportation (refer to VRSM C-1402: Transportation Services)
* interpreters (refer to VRSM C-305: Interpreter Services)
* personal assistant (refer to VRSM C-1403: Personal Assistant Services)
* room and board (refer to VRSM C-418: Room and Board Services)
* occupational licenses (refer to VRSM C-1406: Occupational Licenses)
* computers (refer to VRSM D-204: The Purchasing Process)
* orientation and mobility training (refer to VRSM C-600: Orientation and Mobility Services)
* referral to community resources (refer to VRSM C-405: Financial Aid and Comparable Benefits)

For more information about content in the IPE and IPE amendment, refer to VRSM B-500: Individualized Plan for Employment and Post-Employment. For information about specific goods and services, refer to content throughout the manual.

**C-415: Textbooks and Supplies**

VR may purchase required textbooks and course-related supplies if they are not already included in the cost of tuition and fees. VR pays the entire amount for required books and supplies.

VR must consider the most cost-effective option when purchasing textbooks and supplies.

Options for purchasing textbooks include traditional hardcopy textbooks (new or used) and other formats of textbooks, such as audiobooks, electronic books, and/or e-books.

For additional purchasing information, refer to VRSM D-200: Purchasing Goods and Services. For customers who are eligible for SSI/SSDI because of a disability, refer to VRSM C-406-2: Supplemental Security Income and Social Security Disability Income Recipients.

Tools and equipment that are required for training but will be kept and used by the customer for employment after completing training are purchased according to the processes and procedures in [VRSM C-1407: Tools and Equipment](https://twc.texas.gov/vr-services-manual/vrsm-c-1400#c1407).

**C-415-1: Service Authorization**

The SA for textbooks or supplies must be itemized with the description of the quoted amount.

**C-415-2: Reselling Textbooks**

If a hardcopy of a textbook is purchased but is not needed for a class, for reference, or for the customer's major or minor field of study, the customer can sell the textbook back to the bookstore. When a textbook is sold back to the bookstore, the customer must provide to the VR counselor a copy of the receipt of sale, which is kept in the case file. The amount that was received from the sale of the book must be applied to the cost of books next semester. The amount on the receipt for that textbook is subtracted from the amount needed for the following semester's required textbooks.

If textbooks are sold back to the bookstore and the customer will no longer be participating in training the following semester, the funds, along with the receipt of sale, must be returned to the VR office.

**C-416: Tutoring Services**

Tutoring services might be needed to support the customer's success in approved training programs. When tutoring services are available through the institution at no cost, these resources must be used as a comparable benefit before using VR funds.

If the available resources through the institution do not meet the customer's needs, VR may purchase tutoring services.

**C-416-1: Purchasing Tutoring Services**

Before authorizing the purchase of tutoring services, the VR counselor ensures that the tutor has the necessary experience or skills to teach the customer. The VR counselor documents the tutor's relevant experience and/or skills in a case note and ensures that the provider is set up to receive direct payments from VR for VR services. Do not use maintenance to pay for this service.

The VR counselor may authorize

* a payment rate up to $20 an hour for tutorial services.
* the purchase of tutoring supplies as needed.

When there is a clearly documented need to pay more than $20 per hour or pay by semester for tutorial services, the VR Manager must approve the higher payment rate.

**C-417: Supplemental Specialized Academic Support Services**

Supplemental specialized academic support services may be needed to support the customer's success in approved training programs. The intent of these services is to provide specialized services focused on specific disabilities to meet the customer's academic needs. The services must be provided by the college or university that the customer is currently attending. The VR counselor must provide a Service Justification case note to justify the vocational need for the specialized support service.

To find out whether a supplemental specialized academic support service is under contract, VR staff consults with the appropriate State Office Program Specialist before completing an SA.

The following RHW specifications should be used when creating service records for non-contracted supplemental specialized academic support services at a two-year community college or university:

Level 1 - Training, College and University [86000]

Level 2 - Training – Two-Year Community College [86000-11143]

or

Level 2 - Training – Four-Year College or University [86000-11136]

Level 3 - Support Services or Specialized Tutoring

**C-418: Room and Board Services**

Room and board is a vocational rehabilitation (VR) service that can be provided to customers who are participating in college or university classes or other career and technical training.

**C-418-1: Purchasing Room and Board Services**

The VR counselor may approve VR funds to support room and board when:

* the cost is in excess of the customer's normal living expenses\*;
* the funds are required to support the customer's participation in training; and
* the customer is attending training in person.

If the above requirements are met, VR manager approval is not required if:

* the training is not available in the customer's local community (that is, in the same city as the customer's residence or within a 50-mile radius of the customer's residence);
* the customer’s disability-related needs justify the purchase of room and board regardless of the training being in the customer’s local community; or
* the amount is the best-value decision to support the customer’s participation in training regardless of the training being in the customer’s local community. (For example, the cost of room and board is lower than the cost of paying for transportation to and from the training location.)

Any exception to this policy requires VR Manager approval.

\*For the definition of "normal living expenses," refer to VRSM C-1401-1: Legal Authorization.

Additionally, before a service authorization for room and board is issued, the VR counselor must document in ReHabWorks (RHW) the details from bids obtained for room and board. Bids are required only if the cost is greater than $10,000 per grading period. For additional details, refer to VRSM D-205-3: Competitive Bids.

VR does not pay refundable deposits associated with room and board. For more information, refer to VRSM D-206: Purchasing Restrictions.
The case file must contain:

* documentation confirming that the customer is enrolled in training; and
* a copy of the lease or housing agreement that:
	+ must be in the case file prior to authorizing a payment; and
	+ may be used in lieu of an invoice to authorize payments.

Room and board services must be included on the customer's Individualized Plan for Employment (IPE) or IPE amendment.

**C-418-2: Room and Board Payments and Prorating**

It is preferred that room and board that is paid to an entity other than a public in-state training institution be issued on one SA for the entire grading period and paid monthly. When paying a public in-state training institution, a single (properly pro-rated, when applicable) payment can be made for the entire grading period.

Room and board must be paid directly to the provider. See VRSM D-211: Setting Up and Paying Providers for additional information. However, short-term housing maintenance may be used while a provider is initially being established. VR Manager approval is required to use short-term housing maintenance for these payments. See VRSM C-1401-4: Short-Term Housing Maintenance for additional information.

Services for room and board must be prorated when the service crosses state fiscal years. Refer to VRSM D-212-2: Crossing State Fiscal Years for more information on prorating room and board services.

Room and board can be paid in advance based on the conditions of the lease or rental agreement. See VRSM D-213-2: Advance Payments for additional information.

**C-418-3: Creating a Service Authorization for Room and Board**

A service record must be created with the following RHW specifications for room and board.

**Service Records for Room and Board Paid to a Private Entity or Training Institution**

The following RHW specifications should be used when creating service records for room and board paid to a private entity or training institution:

* Level 1 – Multiple Goods and Services Including Child Care; Youth Goods and Services, Booth Rental and Room and Board for Training and Short-Term Housing for Other Services [27099]
* Level 2 – Room and Board for Training, Short Term Housing for Other Services; Meeting Room Space and Booth Rentals [27099-17440]
* Level 3 – Room and Board for Training
* Level 4 – The VR counselor chooses the appropriate other specifications

**Service Records for Room and Board at a Two-Year Community College**

The following RHW specifications should be used when creating service records for room and board services at a two-year community college:

* Level 1 – Training, College and University [86000]
* Level 2 – Training - Two-Year Community College for tuition started on or after 7/1/2019 [86000-11143]
* Level 3 – Room and Board and Other Support Services paid to the Two-Year Community College providing the Training

**Service Records for Room and Board at a Four-Year College or University**

The following RHW specifications should be used when creating service records for room and board services at a four-year college or university:

* Level 1 – Training, College and University [86000]
* Level 2 – Training - Four-Year College or University for tuition started on or after 7/1/2019 [86000-11136]
* Level 3 – Room and Board paid to the Four-Year College or University providing the Training

**Service Records for Room and Board at a Public Health-Related Institution**

The following RHW specifications should be used when creating service records for room and board services at a public health-related institution:

* Level 1 – Training, College and University [86000]
* Level 2 – Training - Public Health Related Institutions for tuition started on or after 7/1/2019 [86000-11129]
* Level 3 – Room and Board paid to the Public Health Related Institution providing the Training

**C-419: Work Readiness Services**

Work Readiness Services prepare customers to find work and stay employed by learning and adjusting to the daily workplace routine. The goal is to help customers develop competencies and strategies to succeed in a competitive, integrated workplace. These services allow a customer to achieve an individualized level of work readiness related to disability issues, interpersonal skills training, daily living skills, and issues that interfere with his or her participation in obtaining or maintaining employment. The purpose of Work Readiness Services is to help the customer develop the competencies and essential skills that are necessary to function successfully on the job and in the community. Work Readiness Services benefit customers who have never worked, who have been unemployed for a long time, or who have a sporadic work history.

Work Readiness Services are designed to:

* meet the unique needs of each customer;
* help resolve or manage vocational impediments; and
* increase the customer's self-sufficiency.

Work Readiness Services may be purchased when a customer needs more assistance than VR staff members can provide directly. The services help the customer develop specific skills or complete specific tasks before he or she begins the job search.

Work Readiness Services are suitable for both Pre-Employment Transition Services customers and Basic VR customers. The provider obtains the parent or legal guardian’s signature when a customer is under the age of 18.

When the customer’s referral form indicates the services can be provided remotely, refer to the VR Standards for Providers VR-SFP 3.4.8 Remote Service Delivery for requirements. The service descriptions below will indicate when remote service delivery is allowed.

The premiums may be available for some Work Readiness Services. Premiums are paid after all deliverables for the service have been achieved. For more information about premiums, refer to the VR Standards for Providers (VR-SFP), Chapter 20: Premiums.

**C-419-1: Personal Social Adjustment Training**

Personal Social Adjustment Training (PSAT) is designed to teach skills related to acceptable work behaviors and to improve interpersonal skills that inhibit the customer's abilities to successfully obtain and maintain competitive integrated employment. PSAT can be used to reinforce behaviors and skills that the customer previously failed to master. Before PSAT is provided to a customer, a Personal Adjustment Evaluation is completed to identify the goals to be addressed in the PSAT.

This service can be provided remotely when the VR counselor has indicated approval of remote service delivery on the Form VR3121, Referral for Personal Social Adjustment Training and Work Adjustment Training. For information, refer to VR-SFP 3.4.8 Remote Service Delivery.

For additional information, refer to VR-SFP Chapter 13: Work Readiness Services, VR-SFP 13.3 Personal Social Adjustment Training Evaluation and VR-SFP 13.4 Personal Social Adjustment Training.

The VR counselor must sign Form VR3137B, Personal Social Adjustment and Work Adjustment Training Plan, indicating agreement with PSAT goals, objectives, and training hours before training is provided after the evaluation or before additional monthly hours are authorized with a service authorization. For information on acceptable signatures refer to VR-SFP sections 3.2.14 Documentation and VR-SFP 3.2.16 Signatures.

**PSAT Procedures**

The VR counselor completes the Form VR3121, Referral for Personal Social Adjustment Training and Work Adjustment Training, entirely, records areas that the VR counselor wants evaluated, and attaches all information as instructed on the form. The VR counselor indicates when the services can be provided remotely, in a setting where the trainer and student are in the same location, or a combination of both. The attached information provides background information necessary for the provider to effectively work with the customer.

After the personal adjustment trainer completes the Form VR3137A, Personal Social Adjustment Training and Work Adjustment Training Evaluation, the trainer completes Form VR3137B, Personal Social Adjustment and Work Adjustment Training Plan, getting feedback from the VR counselor and the customer to identify measurable goals and objectives.

Planning meetings related to the training plan between customer, provider, customer’s circle of supports, and VR staff may be conducted remotely. For information, refer to VR-SFP 3.4.8 Remote Service Delivery.

Before a PSAT service is provided, the VR counselor must sign the Form VR3137B, approving the goals, objectives, and training time. A service authorization for the PSAT is issued after the VR counselor approves the form VR3137B. The number of hours of PSAT are authorized for each week monthly.

The VR counselor reviews the Form VR3137B at least monthly, signing approval of the goals and objectives before a service authorization is issued for the additional hours.

The VR counselor must approve Form VR3138, Personal Social Adjustment Training and Work Adjustment Training Report, before payment of the invoice.

**C-419-2: Work Adjustment Training**

Work Adjustment Training (WAT) is designed to improve work behaviors and enhance interpersonal skills of the customer while he or she performs competitive integrated employment in a structured environment. WAT cannot be provided remotely. Before WAT is provided to a customer, a WAT evaluation is completed to identify the customer's goals that will be addressed in the WAT.

WAT is for customers who have:

* never worked before;
* had sporadic work histories;
* not worked in a long time; and/or
* behavioral and/or attitudinal issues such as communication with employers, customers, and coworkers; work attire; hygiene; and dress code for the work environment that require remediation before the customer is likely to find and keep employment.

For WAT evaluation, refer to VR-SFP Chapter 13: Work Readiness Services, 13.5.3 Outcomes Required for Payment. For WAT, refer to VR-SFP 13.6.3 Outcomes Required for Payment. For PSAT fees, refer to VR-SFP 13.18 Work Readiness Services Fee Schedule.

WAT staff qualifications are at VR-SFP 13.2.2 Work Adjustment General Staff Qualifications.

WAT must be provided in a work setting where the work performed by the customer produces compensation for both the provider's business and the customer. The customer must be paid at least minimum wage for all hours worked.

The VR counselor signs Form VR3137B, Personal Social Adjustment and Work Adjustment Training Plan, indicating agreement with WAT goals, objectives, and training hours before training is provided after the evaluation or additional monthly hours being authorized with a service authorization.

**WAT Procedures**

A VR staff member completes Form VR3121, Referral for Personal Social Adjustment Training and Work Adjustment Training entirely, recording the areas that the VR counselor wants evaluated, and attaches all information as indicated on the form. The attached information provides background information necessary for the provider to work effectively with the customer.

After the work adjustment trainer completes the evaluation, he or she completes Form VR3137B, Personal Social Adjustment Training (PSAT) and Work Adjustment Training (WAT) Training Plan, using feedback from the VR counselor and the customer to identify measurable goals and objectives. Before a WAT service is provided, the VR counselor signs the Form VR3137B, approving the goals, objectives, and training time. For information on acceptable signatures refer to VR-SFP sections 3.2.14 Documentation and VR-SFP 3.2.16 Signatures.

Planning meetings related to the training plan between the customer, provider, customer’s circle of supports, and VR staff may be conducted remotely. For more information, refer to VR-SFP 3.4.8 Remote Service Delivery.

A service authorization for WAT is issued after the VR counselor approves the Form VR3137B. The number of hours of WAT for each week are authorized monthly. The VR counselor reviews Form VR3137B at least monthly, approving by signature the customer's goals and objectives before a service authorization is issued for the additional hours.

The VR counselor must approve Form VR3138, Personal Social Adjustment Training PSAT) and Work Adjustment (WAT) Training Report before paying the invoice.

**C-419-3: Vocational Adjustment Training**

Vocational Adjustment Training (VAT) includes structured classes that help a customer learn and adjust to the daily workplace routine and to address or to manage vocational impediments. VAT allows a customer to develop the competencies and essential skills necessary to function successfully on the job and in the community. There are 9 different curriculums offered in VAT.

Some VAT services may be provided remotely when the VR counselor has indicated approval of remote service delivery on the Form VR5000, Referral for Provider Services. For more information, refer to VR-SFP 3.4.8 Remote Service Delivery. The service definition in the VR-SFP must allow for remote service delivery.

Below is the title and brief description of the service.

* Exploring the "You" in Work—assists the customer in understanding his or her own work personalities, interests, values, and transferable skills.
* Soft Skills for Work Success—focuses on developing essential skills related to effective communication, problem solving, work habits, and work ethics.
* Soft Skills to Pay the Bills–Mastering Soft Skills for Workplace Success—is a curriculum for youth that focuses on communication, enthusiasm and attitude, teamwork, networking, problem solving and critical thinking, and professionalism.
* Entering the World of Work—focuses on skills related to workplace expectations, rules, and laws.
* Preparing for a Job Search—is only for youth and focuses on developing skills essential to preparing for the job search.
* Disability Disclosure Training—assists the customer in making informed decisions about disclosing his or her disability.
* Money Smart: A Financial Education Training—focuses on skills related to money management and finances.
* Public Transportation Training—teaches skills related to using public transportation.
* VAT Specialized—services include both evaluation and training of the customer. It an individualized goal-driven service that teaches skills to overcome or manage impediments to employment. This service is purchased for a customer only when another structured VAT must not meet the customer's needs.
* Exploring Postsecondary Education and Training—assists the customer to understand and explore post-secondary education and training.

The Deaf Premium and Blind Premium are available for all Vocational Adjustment Services. The Deaf Premium does not include VAT-Specialized, for information go to VR-SFP 20.5 Deaf Service Premium. The Mileage Premium is available for all Vocational Adjustment Services; for information go to VR-SFP 20.6 Mileage Premium. Service Authorizations for premiums are issued at the same time the service authorization for the base services is issued.

The references below are to the service definition, process and procedures, and outcomes required for payment and fee for each of the VAT services.

* VR-SFP 13.7 VAT Explore the "You" in Work
* VR-SFP 13.8 VAT Skills to Pay the Bills—Mastering Soft Skills for Workplace Success
* VR-SFP 13.9 VAT Soft Skills for Work Success
* VR-SFP 13.10 VAT Entering the World of Work
* VR-SFP 13.11 VAT Job Search Training—for Pre-Employment Transitional Services Customers Only
* VR-SFP 13.12 VAT Disability Disclosure Training
* VR-SFP 13.13 VAT Money Smart—A Financial Education Training
* VR-SFP13.14 VAT Public Transportation Training
* VR-SFP 13.15 VAT Specialized Evaluation
* VR-SFP 13.16 Vocational Adjustment Training Specialized
* VR-SFP 13.17 VAT Exploring Postsecondary Education and Training

In addition to VR Standards for Providers contractors, Transition Educator providers and Nontraditional providers may provide VAT services. Refer to VRSM C-1005: Non-Contracted Providers for information about the requirements of Nontraditional providers and Transition Educator providers.

For VAT-Specialized Evaluation and VAT-Specialized, the VR counselor signs the Form VR3135B, Vocational Training Specialized Training Plan, indicating agreement with the VAT goals, objectives, and training hours before training is provided after the evaluation or before additional monthly hours are authorized with a service authorization. Planning meetings related to the training plan between customer, provider, customer’s circle of supports and VR-Staff may be conducted remotely. For more information, refer to VR-SFP 3.4.8 Remote Service Delivery.

For information on acceptable signatures refer to VR-SFP sections 3.2.14 Documentation and VR-SFP 3.2.16 Signatures.

The VAT staff qualifications can be found at VR-SFP 13.2.3 Vocational Adjustment Trainer Staff Qualifications.

VAT services may not be purchased more than once for a customer without management approval. If it is necessary to purchase a VAT service more than once, a Form VR3472, Contracted Service Modification Request, must be completed and approved by the director of VR.

**Transition Educators and Nontraditional Providers Fees**

Transition Educator providers and Nontraditional providers may provide VAT services. Transition Educator providers and Nontraditional providers must provide the services as outlined in the VR Standards for Providers and in the service authorization. Refer to VRSM C-1005: Non-Contracted Providers for information about the requirements of Nontraditional providers and Transition Educator providers.

**Fee Chart for Nontraditional Providers**

|  |  |
| --- | --- |
| **Service** | **Fee** |
| Disability Disclosure Training | $411.00 |
| Money Smart—A Financial Training | $616.50 |
| Soft Skills to Pay the Bills—Mastering Soft Skills for Workplace Success | $411.00 |
| Public Transportation Training—Individual | $22.50 per hour |
| Public Transportation Training—Group | $11.40 per hour |
| Exploring the "You" in Work | $205.50 |
| Soft Skills for Work Success | $308.25 |
| Entering the World of Work | $205.50 |
| Preparing for the Job Search—For Students with Disabilities Only | $411.00 |
| Exploring Postsecondary Education and Training | $205.50 |

**Fee Chart for Transition Educator Providers**

|  |  |
| --- | --- |
| **Service** | **Fee** |
| Disability Disclosure Training | $548.00 |
| Money Smart—A Financial Training | $822.00 |
| Soft Skills to Pay the Bills—Mastering Soft Skills for Workplace Success | $548.00 |
| Public Transportation Training—Individual | $30.00 per hour |
| Public Transportation Training—Group | $15.20 per hour |
| Exploring the "You" in Work | $274.00 |
| Soft Skills for Work Success | $411.00 |
| Entering the World of Work | $274.00 |
| Preparing for the Job Search—For Students with Disabilities Only | $548.00 |
| Exploring Postsecondary Education and Training | $274.00 |

**VAT Procedures**

VR staff completes the Form VR5000, Referral for Provider Services, in its entirety, noting the areas that the VR counselor wants emphasized in the training, and attaches all information as indicated on the form. The VR counselor indicates when the services can be provided remotely, in a setting where the trainer and student are in the same location, or a combination of both. A service authorization for the service and any associated premiums is issued. The attached information provides background information necessary for the provider to work effectively with the customer.

After the Vocational Adjustment trainer completes the training service with the customer, he or she completes the form associated with that VAT service and submits it with an invoice. The VR counselor approves the VAT form required for the specific VAT service and ensures that all required outcomes for payment have been achieved before payment of the invoice.

The service provider is required to maintain attendance records, curricula, lesson plans, and other documentation as required in the contract and in the VR Standards for Providers and must produce those materials for TWC staff upon request.

For information about the process for using Transition Educator providers or Nontraditional providers, including how to prepare and set up the providers in ReHabWorks, refer to VRSM C-1005: Non-Contracted Providers.

**C-419-4: JobTIPS Student Online Program**

JobTIPS Student is an online program that offers real-world examples as well as assistance to help teens and adults transition to the workplace. The VR counselor may purchase JobTIPS Student to support the customer in the job search.

The JobTIPS Student online program:

* includes videos and pictures demonstrating what to do and what not to do in a variety of situations; the videos and pictures support the program content;
* contains printable materials, including worksheets, cue cards, summaries, visual schedules, graphic organizers, and assessments that facilitate practice opportunities to master and generalize important job-related skills;
* instructs the student as to the steps to take and provides the rationale behind each behavioral and social exchange to help the customer learn to understand another individual's perspective and thereby understand the reasons for the thoughts and actions of others;
* uses step-by-step instructions and extensive visual and interactive supports to break down employment situations into specific actions and behaviors; and
* provides learning resources, guided exercises, graphic organizers, role-playing scenario cards, video tutorials, and visual prompts to help students with any learning style.

JobTIPS Student online program core sections include the following:

* Determining Interest: provides an opportunity to explore interests by examining the types of social and environmental demands associated with certain jobs by taking an interest quiz and by reading job descriptions.
* Finding a Job: guides the customer through the process of finding a job, from networking to conducting internet searches and navigating job fairs.
* Getting the Job: provides detailed instructions on how to obtain references and how to complete résumés, cover letters, applications, and how to prepare for the interview process.
* Keeping the Job: guides the customer through the demands associated with keeping a job, such as how to appropriately communicate, socialize, and cope in the work environment.

VR may purchase a license for a customer to access JobTIPS Student online programs.

**C-420: Apprenticeship Opportunities and On-the-Job Training**

Refer to VRSM C-1007-5: Apprenticeship Opportunities for information about this service.

**C-421: Work Experience Services**

Work Experience services include Work Experience Placement and Work Experience Training. These services allow a customer to be placed within a business or organization in the community to complete a short-term (12 weeks or fewer), part-time work experience to learn skills that are transferable to future long-term competitive integrated employment. Work Experience Services can be used with students and youth with disabilities, adults, and in trial work. A customer's work experience can be in a volunteer position, internship, or temporary short-term employment in which wages are paid by the employer or purchased by Vocational Rehabilitation (VR) via Wage Services.

Work Experience Services can be purchased for customers:

* with limited or no work history;
* who need to gain experience related to the vocational training or degree they have completed; and/or
* with acquired vocational barriers that limit their capacity to continue to work in a field in which they were previously employed.

A customer must have unexpired employment authorization documents to participate in a short-term paid-work setting. For more information, see VRSM B-204-2: Customer Identification and Authorization for Employment.

For details on how Work Experience Services can benefit a customer, refer to VR-SFP Chapter 14: Work Experience Services.

When a single work experience must exceed 12 weeks to meet the customer's individualized needs, the VR counselor must document the reason for the extension in a case note and obtain approval from the VR Supervisor. The case note must include the goals to be achieved and the number of additional weeks that are needed to meet the customer's needs. The VR Supervisor must document the required approval in a case note in ReHabWorks (RHW).

The following premiums are available for Work Experience Services. Refer to the links below for additional information:

* VR-SFP 20.11 Blind Premium
* VR-SFP 20.10 Brain Injury Premium
* VR-SFP 20.6 Mileage Premium

Service authorizations for premiums must be issued at the time the service authorization for the base service is issued

**C-421-1: Legal Authorization**

34 CFR §361.42(e)(2) Assessment for determining eligibility and priority for services

"(e) Trial work experiences for individuals with significant disabilities. (1) Prior to any determination that an individual with a disability is unable to benefit from vocational rehabilitation services in terms of an employment outcome because of the severity of that individual's disability or that the individual is ineligible for vocational rehabilitation services, the designated State unit must conduct an exploration of the individual's abilities, capabilities, and capacity to perform in realistic work situations.

(2)(i) The designated State unit must develop a written plan to assess periodically the individual's abilities, capabilities, and capacity to perform in competitive integrated work situations through the use of trial work experiences, which must be provided in competitive integrated employment settings to the maximum extent possible, consistent with the informed choice and rehabilitation needs of the individual.

(ii) Trial work experiences include supported employment, on-the-job training, and other experiences using realistic integrated work settings.

(iii) Trial work experiences must be of sufficient variety and over a sufficient period of time for the designated State unit to determine that—

(A) There is sufficient evidence to conclude that the individual can benefit from the provision of vocational rehabilitation services in terms of an employment outcome; or

(B) There is clear and convincing evidence that due to the severity of the individual's disability, the individual is incapable of benefitting from the provision of vocational rehabilitation services in terms of an employment outcome; and

(iv) The designated State unit must provide appropriate supports, including, but not limited to, assistive technology devices and services and personal assistance services, to accommodate the rehabilitation needs of the individual during the trial work experiences."

**C-421-2: Work Experience Referral**

Before referring a customer for Work Experience Services, the customer's individualized plan for employment (IPE), trial work plan (TWP), or IPE amendment must include Work Experience Services as a service. For more information, refer to VRSM B-310: Trial Work Services, VRSM B-400: Completing the Comprehensive Assessment, and VRSM B-500: Individualized Plan for Employment and Post-Employment. Students with disabilities who are potentially eligible can also participate in Work Experience Services when a service justification is completed.

To initiate Work Experience Placement Services with a provider, the VR counselor completes Form VR1600, Work Experience Referral. The referral must identify the date, time, and location for the work experience planning meeting.

To initiate Work Experience Training with a provider, the VR counselor completes the Form VR1600, Work Experience Referral indicating the goals to be addressed by the Work Experience Trainer.

When a customer will receive both Work Experience Placement and Work Experience Training, only one Form VR1600, Work Experience Referral is necessary.

The VR counselor must complete all sections of the Form VR1600, leaving no blanks. The VR counselor indicates when Work Experience Placement can be provided remotely, in a setting where the trainer and student are in the same location, or a combination of both.

**C-421-3: Work Experience Placement**

VR counselors can purchase Work Experience Placement from a contracted provider when a customer needs to gain work experience in realistic work environments involving work that is consistent with the customer's strengths, resources, priorities, concerns, abilities, capabilities, interests, and informed choice. The Work Experience Placement specialist helps the customer to locate and obtain a work experience site that meets the criteria determined and documented on the Form VR1601, Work Experience Plan and Placement Report.

Planning meetings related to the training plan between the customer, provider, customer’s circle of supports, and VR staff may be conducted remotely. For more information, refer to VR-SFP 3.4.8 Remote Service Delivery.

Wage services can be purchased simultaneously with Work Experience Placement when a VR counselor wants to sponsor the payment of the customer's gross wage, worker compensation insurance and associated costs. See VRSM C-1408: Wage Services for Work Experience through WorkQuest, for additional information.

See VR-SFP Chapter 14: Work Experience Services for more information on staff qualifications, service definition, process and procedure, and outcomes required for payment and fees.

Any request to change a Work Experience Service Description, Process and Procedure, or Outcomes Required for Payment must be documented and approved by the VR Director using the Form VR3472, Contracted Service Modification Request, before the change is implemented.

Summer Earn and Learn (SEAL) placements are not purchased as a Work Experience Placement service as described in VR-SFP Chapter 14: Work Experience Services. For more information, refer to VRSM C-1306-1: Summer Earn and Learn.

The VR counselor:

* completes Form VR1600, Work Experience Referral, leaving no blanks, and attaching, as applicable, medical or psychological reports, case notes, vocational testing, or employment data collected by VR staff that will assist the provider in working with the customer;
* will indicate on the Form VR1600, Work Experience Referral, when the services can be provided remotely, in a setting where the trainer and student are in the same location, or a combination of both;
* through discussion with the Work Experience specialist and the customer, completes Form VR1601, Work Experience Plan and Placement Report, electronically at the Work Experience Placement meeting;
* prints Form VR1601, Work Experience Plan and Placement Report, for required signatures from the VR counselor, Work Experience specialist, and the customer;
* ensures VR staff sends the service authorization and electronically fillable forms to the Work Experience specialist so the forms can be completed, with the information about the placement obtained for the customer;
* monitors the customer's progress;
* provides any needed instruction or intervention necessary to foster the customer's success;
* reviews and approves Form VR1601, Work Experience Plan and Placement Report, ensuring that all outcomes required for payment are achieved and that the staff qualifications were held by the individual providing the service to the customer; and
* ensures that the invoice is paid.

Work Experience Placement services can be purchased without purchasing Work Experience Training.

VR will not pay any provider for Job Placement Services, including Supported Employment services, if a customer is hired into permanent employment by the work site during or after any Work Experience. Job Skills Training can be purchased when the customer begins a permanent employment placement, if necessary.

Nontraditional providers and Transition Educator providers can be used when all requirements outlined in VRSM C-1005: Noncontracted Providers have been met.

When working with nontraditional providers and Transition Educator providers, the VR-SFP sections titled Service Description, Process and Procedures, and Outcomes Required for Payment in VR-SFP Chapter 14: Work Experience Services, and section 14.3 Work Experience Placement must be followed; however, the staff qualifications and purchasing fees outlined in the VR-SFP Chapter 14 do not apply. The nontraditional provider and transition educator provider fee are listed below.

**Fee Chart for Nontraditional Providers and Transition Educator Providers**

|  |  |
| --- | --- |
| **Service** | **Fee** |
| Work Experience Placement by Nontraditional Providers | $440.00 |
| Work Experience Placement by Transition Educators | $600.00 |

**C-421-4: Work Experience Training**

VR counselors can purchase Work Experience Training services provided by a Work Experience trainer when a customer needs:

* monitoring to ensure the customer is meeting the work site expectations and has the supports and accommodations necessary to be successful; and/or
* more training and support than is occurring at the work experience site.

Work Experience Training may be purchased without the purchase of Work Experience Placement.

The counselor, customer, provider, and the employer are all be involved in the decision to allow remote Work Experience Training at a worksite. The employer must agree to allow use of the technology, internet and/or devices to be used by the customer at the work experience site. The use of the technology, internet and/or devices should not exclude or stigmatize the customer. Remote Work Experience Training must be supplemented with in person Work Experience Training away from the job site.

See VR-SFP Chapter 14: Work Experience Services for more information, including staff qualifications, service definition, process and procedures, and outcomes required for payment and fees.

Work Experience Training can be purchased to support the customers in the Summer Earn and Learn program and customers who are placed in a Work Experience program arranged by VR staff or other external entities.

The VR counselor:

* completes Form VR1600, Work Experience Referral leaving no blanks and attaching, as applicable, medical or psychological reports, case notes, vocational testing, or employment data collected by VR staff that will assist the provider in working with the customer;
* ensures Form VR1600 or service authorization comments indicate whether the training can be done as a combination of remote and in-person training for a customer, or if the training should all be done in person;
* ensures that VR staff sends the service authorization to the provider;
* monitors the customer's progress with the customer, Work Experience Specialist and with the SEAL provider or business, as applicable;
* provides any needed instruction or intervention necessary to foster the customer's success;
* reviews and approves Form VR1604, Work Experience Training Report, ensuring that all outcomes required for payment are achieved and that the staff qualification were held by the individual providing the service to the customer; and
* ensures that the invoice is paid.

Transition Educator providers and Nontraditional providers may provide Work Experience Training services. Transition Educator and Nontraditional providers are required to provide the services as outlined in the VR Standards for Providers and in the service authorization.

Nontraditional providers and Transition Educator providers can be used when all requirements outlined in VRSM C-1005: Noncontracted Providers have been met.

When working with nontraditional providers and transition educator providers, the VR-SFP sections titled Service Description, Process and Procedures, and Outcomes Required for Payment in VR-SFP Chapter 14, 14.4 Work Experience Training must be followed; however, the staff qualifications and purchasing fees outlined in the VR-SFP Chapter 14 do not apply. The nontraditional provider and transition educator provider fees are listed below.

**Fee Chart for Nontraditional Providers**

|  |  |
| --- | --- |
| **Service** | **Fee** |
| Work Experience Training – Individual | Negotiated up to $22 an hour |
| Work Experience Training – Group | Negotiated up to $11 an hour per customer |

**Fee Chart for Transition Educator Providers**

|  |  |
| --- | --- |
| **Service** | **Fee** |
| Work Experience Training – Individual | Negotiated up to $30 an hour |
| Work Experience Training – Group | Negotiated up to $15 an hour per customer |

**C-421-5: Creating a Service Record for Work Experience in ReHabWorks**

A service record must be created in ReHabWorks with the following specifications for Work Experience Services. See VR-SFP Chapter 14: Work Experience Services. Service Records for Work Experience service:

* Level 1 – Employment Services and Assessments [87100]
* Level 2 – Work Experience Services - CONTRACT REQUIRED PRE-ETS ELIGIBLE [87100-61601]

The VR counselor chooses the appropriate specifications for Level 3 and 4 based on the core service to be provided.

**C-422: Project SEARCH**

Project SEARCH is an international initiative that supports partnerships among businesses (employers), local school districts, VR agencies, and other entities that serve individuals with developmental disabilities. Project SEARCH promotes successful long-term employment of VR customers in jobs that are stable, meaningful, integrated, and competitively compensated.

The program takes place in business settings where immersion in the workplace facilitates the teaching and learning process as well as the acquisition of employability and marketable work skills. Project SEARCH customers participate in three internships to explore a variety of career paths. The customers work with a team that includes family and partnering agencies to create an employment goal and support the customers during this important transition from school to work.

Project SEARCH services are provided through a collaborative process in which the Project SEARCH team—the VR provider, host business, school district, long-term support organization, and VR counselor—work together to help the customer achieve the goals of the internship and placement. The use of a memorandum of understanding (MOU) between the Project SEARCH team members may be used to outline the roles and responsibilities.

**Legal Authorization**

"…to heighten emphasis on the provision of services to students and youth with disabilities to ensure that they have meaningful opportunities to receive the training and other services they need to achieve employment outcomes in competitive integrated employment. WIOA expands not only the population of students with disabilities who may receive services but also the kinds of services that the VR agencies may provide to youth and students with disabilities who are transitioning from school to postsecondary education and employment." —Title I of the Act, as amended by the Workforce Innovation and Opportunity Act (WIOA) (29 USC §720 et seq.)

**Project SEARCH Requirements**

To start a Project SEARCH site, a onetime fee is paid to the National Project SEARCH office. Either the school district covers the fee, or local community partners raise the funds. These funds pay for the team's training on the Project SEARCH model.

Project SEARCH service authorizations to the Employment Services Provider (ESP) should be issued using Pre-employment Transition Services (Pre-ETS) funds for those eligible customers until they have obtained employment. Regular VR funds must be used to purchase Benchmarks A–C.

Planning is important to ensure that the appropriate amount of money is budgeted for each benchmark.

For the fee structure provided to ESPs, refer to VR-SFP Chapter 16: Project SEARCH Services, VR-SFP 16.5.4 Project SEARCH Services Fees.

**IPE Requirements**

Project SEARCH customers must have an IPE that states their participation in the program and all additional services that the VR counselor approves for participation (for example, transportation assistance and purchase of work uniforms).

**C-422-1: Steps to Establish a Project SEARCH Site**

To start a Project SEARCH program, the VR counselor contacts Project SEARCH Statewide Coordinator by sending an email to the VR Pre-ETS mailbox. After contact with the Project SEARCH Statewide Coordinator, VR staff members ensure the following partners agree to start a program:

* Education: the local independent school district (ISD)
* Long-term support: the local intellectual and developmental disabilities (IDD) authority.

The team, comprising VR, the ISD, and local authorities, and possibly the host business if it has already been identified, can begin without an identified host business or Employment Services Provider (ESP). The team, not VR, selects the ESP based on interviews with all team members. VR schedules interviews for interested ESPs that have a current VR Project SEARCH contract.

The national Project SEARCH office is contacted with a request to start a program by the Project SEARCH Statewide Coordinator. Project SEARCH requires that a local partner hold a licensing agreement with its office, stating that the team will follow its model. The ISD typically holds the license; VR does not hold this license.

Once the national Project SEARCH office approves the license, it schedules training for the team. After the formal training from the national office begins, the office supports the team by setting up monthly meetings for planning and maintaining the program. While the ISD and the ESP are involved in the daily operations of the program, VR staff members assigned to the team must maintain regular, at least monthly, communication through emails or conference calls in addition to the monthly planning meetings.

**C-422-2: Intern Selection Process**

The Project SEARCH team interviews applicants through an assessment day. A rubric system is used to determine whom will be offered acceptance into Project SEARCH for the upcoming school year at the host business. When VR has not yet determined a student's eligibility for VR services, the student may be selected for Project SEARCH, pending a VR eligibility decision.

**C-422-3: Asset Discovery**

VR customers must have been determined eligible for VR services before they begin Asset Discovery.

The service authorization for the Asset Discovery phase should be issued before the school year ends to allow the ESP time to meet with all the customers. This service must be completed prior to Skills Training beginning.

**C-422-4: Skills Training**

Since each Project SEARCH team determines the length of the rotations at the host business (eight–12 weeks), it is important that the team create a calendar showing when rotations begin and end. This ensures that VR staff members know when to issue service authorizations for skills training to the ESP.

Project SEARCH Skills Training is based on experiential learning at a host business with support from the business and Project SEARCH team and is most effective when provided in person. When a host business will not allow interns or staff onsite for safety or other reasons, the Project SEARCH team can develop an alternate training method and the VR counselor authorizes the training method on the referral form. Remote services must follow VR-SFP 3.4.8 Remote Service Delivery.

**C-422-5: Job Placement**

Form VR3363, Project SEARCH Job Placement Services Plan, must be developed by the end of the third rotation or at any time during the rotations that the team determines job placement opportunities are available to the customer because of skills gained in the internships. Once the Form VR3363, Project SEARCH Job Placement Services Plan is complete, the VR counselor issues Benchmark A service authorization for job placement services.

More than one service authorization may be open at the same time for internship rotations and job placement. The VR counselor attends the monthly steering committee meetings and the employment planning meetings each rotation to ensure that he or she is in regular communication with the Project SEARCH team and knows when service authorizations are needed.

If the customer needs job coaching to be successful in his or her employment, the ESP must provide the service and may not bill separately.

The customer must work 90 days in the same position. If a customer loses a job before the 90-day benchmark, the customer's progression towards completion of the benchmark ends. When the customer becomes employed again, the day count will start at day 1 for the new position.

The 90-day count for successful closure will start over anytime a customer:

* Loses their job;
* Changes employers;
* Changes positions with same employer;
* Receives a promotion; or
* Quits their job voluntarily.

Each benchmark is paid only once for each customer between Active Status (customer has an IPE) and Closure Status of a VR case. On a case-by-case basis, when the VR counselor determines the provider should be paid for making a second placement a Form VR3472 must be approved by the VR Director prior to the service authorization being issued.

For additional information on Asset Discovery, Skills Training, and Project SEARCH Job Placement, see VR-SFP Chapter 16: Project SEARCH.

**C-422-6: Measurable Skill Gains (MSG) Related to Project SEARCH**

For an MSG to be recognized for customers that participate in Project SEARCH, the customer must:

* Be enrolled in school
* Have an IPE goal that matches the training areas of their rotations
* Have Project SEARCH documented on the IPE as a service

**Documenting Project SEARCH in RHW**

The customer’s training information must be documented in ReHabWorks (RHW) and the Form VR3362, Project SEARCH Progress Report, must be in the case file to ensure adequate reporting of Measurable Skill Gains (MSG). Refer to VRSM A-505: Documenting Measurable Skill Gains for additional information.

For each Project SEARCH rotation, a Semester/Grading Period record must be entered identifying the rotation completed.

For additional information on entering training information in RHW, please see the ReHabWorks User Guide B-300: Education History.

**C-423: Other Training**

Other training must specifically meet the customer’s vocational rehabilitation need and be consistent with the IPE and vocational objectives.

Other training services may include instruction in the following areas:

* Adult education and literacy programs
	+ Basic reading, writing, and math
	+ Preparing to take a high school equivalency assessment approved by the Texas Education Agency (TEA) (that is, the GED test, HiSET exam, or TASC test)
	+ English as a second language
	+ High school credit courses
	+ Meeting adult continuing education objectives below the college credit level

Note: As a comparable benefit, available programs can be found in Texas at adult education and literacy programs funded by the TWC. Local education agencies also offer high school credit courses.

* Driver training;
* Postsecondary education programs not at the college credit level;
* The educational prerequisites for vocational skills training;
* [Teacher alternative certification program approved and accredited by TEA;](https://tea.texas.gov/texas-educators/preparation-and-continuing-education/educator-preparation-home)
* [Educator Preparation Programs (EPPs) approved and accredited by TEA;](https://tea.texas.gov/texas-educators/preparation-and-continuing-education/educator-preparation-home)
* Communication training for the deaf; and
* Coping strategies training for the deaf or hard of hearing and blind.

Comparable services and benefits and required customer participation in the cost of services must be applied to the cost of all training services before VR funds are used. Refer to VRSM C-405: Financial Aid and Comparable Benefits.

The VR Services payment amount is based on published or current community rates. VR counselors may not approve payment for these services when the customer is:

* a resident of a state institution; or
* entitled to free services.

Before considering the purchase of other training services, the unit purchasing specialist works with the requesting staff to verify that the provider has the necessary qualifications, credentials, and/or licenses before requesting the vendor be setup and linked. Refer to VRSM Part C – Vocational Rehabilitation Services for available VR services that could meet customers’ needs first, and to the applicable policy for qualification requirements. Refer also to VRSM D-211: Setting Up and Paying Providers.

**C-423-1: Adult Basic Education**

TWC or other governmental agency programs provide adult basic education with federal funds. VR counselors must not encumber VR funds for this activity.

**High School Equivalency Tests**

VR may pay the cost of high school equivalency testing for assessments approved by the TEA. As of January 29, 2016, approved assessments for Texas are the GED test, HiSET exam, and TASC test. VR counselors must review the TEA website to compare assessments and determine the best option for the customer.

**C-423-2: Criss Cole Rehabilitation Center Training**

The Criss Cole Rehabilitation Center (CCRC), a component of the Vocational Rehabilitation (VR) program, provides cost-effective, comprehensive rehabilitation center training services. VR counselors refer customers to these services, as appropriate. Customers who want to attend CCRC must complete a tour of the center as part of the admission process.

For more information on the CCRC admissions process, refer to VRSM C-503: CCRC Admissions Process.

#### Rehabilitation Center Training Outside of the CCRC

If a customer is requesting rehabilitation center training outside of the CCRC, the VR counselor must provide the customer with information about CCRC and recommend that the customer complete a tour of CCRC. If a tour is not available, or if the VR counselor and customer decide that a tour is not in the best interest of the customer, the VR counselor must clearly document in ReHabWorks (RHW) the circumstances and reason for making the decision. If a VR counselor recommends rehabilitation center training outside of the CCRC, the following must be documented in ReHabWorks (RHW) case notes:

* The fact that the customer completed a CCRC tour with a CCRC staff member or the reason the customer did not complete a tour
* VR counselor justification and explanation for recommending rehabilitation center training services outside of CCRC
* VR Manager approval

**C-424: Vocational Rehabilitation Teacher**

VR helps Texans who are blind or visually impaired to live as independently as possible and to acquire and maintain employment.

The vocational rehabilitation teacher (VRT):

* encourages the customer's emotional adjustment to blindness;
* teaches alternative and nonvisual techniques as well as prevocational and job readiness skills; and
* shows the customer how to apply these skills to a vocational goal to achieve an employment outcome and live an employment lifestyle.

The VRT may work with:

* employers;
* VR counselors and other VR staff members;
* families;
* educators;
* community providers; and
* others who are supportive of the customer's work and employment lifestyle goals.

**C-424-1: Legal Authorization**

34 CFR §361.48(b)(11)

"(b) Services for individuals who have applied for or been determined eligible for vocational rehabilitation services. As appropriate to the vocational rehabilitation needs of each individual and consistent with each individual's individualized plan for employment, the designated State unit must ensure that the following vocational rehabilitation services are available to assist the individual with a disability in preparing for, securing, retaining, advancing in or regaining an employment outcome that is consistent with the individual's unique strengths, resources, priorities, concerns, abilities, capabilities, interests, and informed choice…

(11) Reader services, rehabilitation teaching services, and orientation and mobility services for individuals who are blind."

**C-424-2: VRT Employment Assistance Services**

The VRT supports the customer's ability to find employment. VRT services require coordination with the VR counselor through all phases of the rehabilitation process, particularly during the eligibility and comprehensive assessment phases.

**C-424-3: Eligibility Decision**

The services of a VRT contribute to the eligibility decision by helping the customer and the VR counselor assess the customer's employability and identify the customer's independent living (IL) and work-related needs. VRT services are only for customers who are blind or visually impaired.

**C-424-4: Trial Work**

The services of a VRT contribute to the eligibility decision, particularly when the customer meets the first three eligibility criteria but has a disability that is a substantial impediment to employment and is severe enough that the VR counselor cannot assume that the customer would benefit from VR services. For more information, refer to VRSM B-300: Determining Eligibility.

If the VR counselor doubts that the customer can benefit from VR services, the VR counselor must use the trial work process to obtain the information needed to make an eligibility decision.

VRT services during pre-eligibility trial work include:

* assessment;
* evaluative training;
* documentation of difficulties noted during training;
* follow-up on the ability to learn and use new skills;
* customer follow-through on assignments; and
* consideration of the impact of any secondary disabilities on VRT services.

The VRT has the option to:

* provide all services as an assessment; or
* complete training recommendations and provide training, if a customer has a pre-eligibility trial work plan.

Note: A customer's case can be closed due to the severity of the customer's disability only if there is clear and convincing evidence that he or she is not capable of finding employment, including supported employment. The information documented by the VRT is vital to this process.

**C-424-5: Customer Referral Process**

VR and Transition counselors make referrals to a Vocational Rehabilitation teacher (VRT) to assess the customer's ability to participate in training and to identify VRT services needed to assist the customer in achieving their employment goal.

**Referrals**

Customers who are blind or visually impaired and who have been identified as having significant functional limitations should be referred to the VRT for services. All exceptions for not being referred to VRT for services must be documented in a case note by the VR counselor.

Customers who plan to receive surgery or treatment that is expected to improve their vision above legal blindness and that is more than 90 days in the future must not be referred to a VRT unless the customer demonstrates critical needs before surgery.

A service record is created for the referral for VRT services. The reason for the referral or any special instructions for assessment and training should be documented in the Specification Description section of the service record and, if necessary, discussed during the staffing session.

Once the first contact has been made by phone or in person, the VRT accepts the service record by updating it from "Requested" to "Assessment" status in RHW.

**VRT Assessment Process and Procedures**

The VRT starts the assessment and identification of the customer's needs at the first contact with the customer.

* When the initial contact is by phone, the VRT completes the assessment in person with the customer.
* When in-person contact is restricted, remote methods can be used to complete the assessment.

Important: Remote methods are used only when in-person contact is restricted. When the Centers for Disease Control and Prevention (CDC), federal, state, and/or local governments issue health and safety protocols such as social distancing, remote methods can be used to complete the assessment. VRT assessments must be completed in-person during all other times of regular agency operations.

The assessment provides information about:

* the customer's adjustment to blindness and his or her acceptance of alternative techniques;
* the customer's current level of employment lifestyle skills;
* the customer's ability to learn skills and benefit from training;
* specific training needs and issues;
* the customer's employment goal;
* the potential effect of VRT services on achieving a vocational outcome; and
* the customer's interest in touring or attending CCRC.

**Assessment Focus and Employment Outcome Process**

Although the VRT does not determine the customer's employment outcome, the assessment must be focused on an employment outcome. If the assessment occurs before an employment outcome is known, the assessment must focus on the customer's:

* emotional adjustment to blindness;
* employment lifestyle skills;
* employment lifestyle in general; and
* vocational skills such as ability statement, personal data sheet, strategy for disclosure of disability, soft skills, and job search skills.

Bulk rehabilitation VRT supplies (VRSM C-407: Rehabilitation Teacher Supplies) may be provided during assessment for evaluative purposes. When VRT supplies are provided during assessment, the documentation should describe in detail what skill or ability is being assessed and how the provided item, device, or equipment aided in the assessment.

Teaching equipment and supplies that must be purchased by the VR counselor cannot be purchased or provided before the Active phase.

For more information, see VRSM D-200: Purchasing Goods and Services.

**Employment Lifestyle Assessment Checklist Process**

The Employment Lifestyle Assessment Checklist (on the VR Teachers Toolkit Intranet page) is a guide and is not put into a case note. Items on the checklist that are relevant to the customer's training needs are noted in assessment case notes, but some items on the checklist may not be relevant. The checklist does not have to be retained after the assessment is completed. For instructions on using the Employment Lifestyle Assessment Checklist, see Checklist Instructions, also in the VR Teachers Intranet Toolkit.

**Assessment Documentation**

The VRT writes an assessment case note titled "VRT Assessment Srvs" for each assessment contact. Case notes are written in narrative form using the six core areas as headings. If no training needs are identified in a core area, the absence of training needs should be stated rather than omitted from the assessment.

**Recommending Training Services Before VRT Assessment Completion**

If the need becomes apparent, the VRT may recommend VRT services at any time before the VRT assessment is completed. This allows the VR counselor to move forward in developing the customer's plan by adding VRT services to the IPE.

To recommend VRT services before the VRT assessment is complete, the VRT:

* writes the recommendation in a "VRT Assessment Srvs" case note and communicates this action in writing to the VR counselor through email, at a staffing session, or by other means; and
* completes the assessment in a timely manner.

When the assessment is complete, the VRT documents training recommendations in a "VRT Training Recommendations" case note.

**VRT Training Recommendations Process**

When the assessment is completed, the VRT enters a separate case note of training recommendations at that time.

**VRT Training Recommendations Documentation**

When making VRT training recommendations, the VRT

* uses a single VRT Training Recommendations case note;
* writes recommendations of training goals that are based on and support the customer's anticipated employment outcome;
* writes recommendations in a list or bulleted format using all six core areas as headings;
* writes a recommendation if the customer expresses an interest in touring or attending CCRC;
* provides an estimated time frame for completing VRT services;
* lists the equipment that will be provided;
* updates the service record from "Assessment" to "Active" status if the IPE has been implemented (Otherwise, the service record stays in "Assessment" status; VRT training should not occur before the IPE is developed, and further VRT services should not occur until IPE development.); and
* notes later changes in routine VRT Training Srvs case notes.

**C-424-6: VRT Comprehensive Assessment**

The VRT's assessment leads to the training recommendations. These recommendations provide critical information to the VR counselor and customer in the development of the customer's IPE. This information can be used to determine:

* an appropriate employment outcome; and
* training needs to develop skills that support a successful employment outcome.

The VRT's assessment focuses on the following three primary areas of VRT services:

* The customer's emotional adjustment to blindness
* The alternative skills that the customer needs to live an employment lifestyle
* The prevocational and job readiness skills that the customer needs to obtain or maintain employment

**C-424-7: Vocational Rehabilitation Teacher Services**

**Vocational Services**

The VRT:

* shares information with the VR counselor about the customer's emotional adjustment to blindness; motivation; and problem solving, organizational, and employment lifestyle skills;
* provides training to help the customer develop and use an ability statement, disclosure strategy, and personal data sheet to complete job applications;
* provides training to help the customer organize and identify a wardrobe for work and provides alternative techniques related to personal appearance and hygiene, if needed;
* goes with the VR counselor to meet employers and/or tour work sites;
* helps with job analyses;
* provides alternative skills training based on known or anticipated job duties;
* provides training, together with the VR counselor, for interviewing skills, résumé development, and career exploration;
* role-plays with the customer for job interviews;
* orients the customer to the workplace, if needed; and
* helps the customer to develop work site skills and/or to obtain needed modifications.
* VRTs provide an array of services to customers in the six core skill areas below.

**Adjustment to Blindness**

The VRT assists the customer to be:

* comfortable as a blind individual and with using the word "blind";
* able to blend into society and cope with negative stereotypes of blind people;
* empowered to take control of his or her life using alternative techniques; and
* knowledgeable about his or her specific eye condition and related blindness issues.

**Employment Lifestyle for Daily Activities**

The VRT helps the customer to master the alternative and nonvisual daily activity skills that he or she needs to function independently at work, in the community, and at home.

**Travel Skills**

The VRT:

* provides recommendations for Orientation and Mobility (O&M) services;
* provides instruction in basic orientation, applying the customer's knowledge of current cane skills;
* provides training in:
	+ cane storage;
	+ protective techniques; and
	+ trailing and guiding techniques (in the customer's home environment only); and
* helps the customer identify employment transportation options and resources.

All other O&M training needs should be addressed by an O&M specialist. O&M services promote independent travel skills for individuals who are blind. O&M training prepares customers to travel independently with competence and confidence. Orientation refers to the process of applying the available senses to establish a customer's position and relationship within the environment. Mobility is the act of moving in the environment with the use of an established tool to aid in travel. Tools include white canes, dog guides, and electronic travel aids.

Note: When coordinating mini-training with CCRC Outreach, the VRT may help with outreach direction. Outreach mini-trainings focus on attitude adjustment rather than skills mastery.

**Communication**

The VRT helps the customer to develop:

* skills to communicate with others using braille and assistive technology;
* effective note-taking methods for employment purposes;
* the ability to dial a standard-size phone;
* the ability to access and record phone numbers;
* methods for planning and accessing schedules and appointments;
* keyboarding skills; and
* basic computer skills, if the customer has proficient keyboarding skills.

**Tech Screener Services**

Tech screeners are VRTs and rehabilitation assistants (RAs) who have received tech- screener training that has been provided or approved by the VRT program specialist. Tech screeners help customers who match the following profile and who are likely to benefit from tech screener referral and services. In these cases, the customer:

* might need to use a computer as part of his or her vocational goal;
* has the cognitive and physical skills for self-directed training;
* appears motivated and willing to use Talking Typing Teacher (TTT) software independently; and
* agrees to practice using TTT according to a weekly schedule with an agreed-on completion date.

Note: Tech screeners also may help customers when there is not enough information about the customer's basic keyboarding and computer skills to justify an Assistive Technology Unit evaluation and training or the purchase of equipment or software.

The tech screener makes recommendations for keyboarding training based on the results of the tech screener assessment. Recommendations might also include basic computer skills training.

For more information, see VRSM D-200: Purchasing Goods and Services.

**Support Systems**

The VRT helps the customer gain the knowledge, skills, and confidence to access available and appropriate resources, including advocacy groups, support groups, mentors, and community resources to maintain an employment lifestyle.

**What the VRT Does Not Do**

The VRT does not:

* establish or change the vocational goal with the customer;
* make the final determination about the customer's readiness for employment; or
* obtain employment for the customer.

**C-424-8: Teacher and Counselor Staffing Sessions Procedures**

The VRT and the VR counselor work together to:

* develop a team approach for services with each customer;
* exchange frequent and regular communication during the provision of VRT services; and
* ensure that comprehensive VRT services are provided in a timely manner.

**Session Focus**

The session is focused on mutual cases, including:

* new referrals and training recommendations on new customers;
* the customer's training progress;
* any customer issues requiring immediate attention;
* updates regarding customer employment and expected closure date;
* discussion of VRT service record closure; and
* changes to the VRT's training recommendations or the customer's IPE.

**Frequency**

The VR counselor and the VRT decide together how often they should meet to review the status of the case. They may meet formally and informally, but must meet often enough to keep each other current on the customer's case.

The VR counselor or VRT document the review of the case in case notes. Deviation from the process is at the discretion of the manager.

**C-424-9: VRT Training Process**

Based on customer needs and VR counselor input, the range of VRT training services can include:

* activities to evaluate the customer's ability to learn skills and benefit from training;
* supportive counseling for adjusting emotionally to blindness;
* training in the use of alternative and nonvisual skills to perform employment and lifestyle daily activities;
* training in communication skills, including braille training, keyboard training, and limited assistive technology training;
* training in limited travel and transportation skills;
* VRT employment-assistance training;
* information, referral, and advocacy; and
* adaptive supplies and equipment.

**Providing Vocational Rehabilitation Teacher Skills Training**

After the VRT makes training recommendations, he or she determines whether the IPE has been implemented and that VRT services are included. VRT training may be initiated once the case is in "Active" phase, and the VRT service record status can be updated to "Active." Services provided before IPE development must be titled "VRT Assessment Services."

Adaptive equipment may be provided during training. All purchases must be coordinated with the VR counselor. Some purchases are subject to income criteria, and this determination is made by the VR counselor. A written justification is needed for the purchase of any adaptive equipment. For more information about adaptive equipment, see VRSM C-407: Rehabilitation Teacher Supplies.

For more information, see VRSM D-200: Purchasing Goods and Services.

**Braille Training**

Braille is an essential skill for most customers who are blind. The VRT and VR counselor are responsible for encouraging customers who cannot access print efficiently and effectively to learn braille. To make an informed choice regarding braille training, customers are offered the opportunity to learn braille after they have a braille assessment using nonvisual techniques. Information on components of a braille assessment can be found in Best Practices for Braille Training that can be found on the Blind and Visual Impairment Services intranet page.

**Interruption of VRT Services**

When VRT services are interrupted, the VRT:

* updates the service record to "Interruption" status;
* enters a case note titled "VRT Interrupted" status, documenting the reason for the interruption and when services are expected to resume; and
* periodically checks on the customer to determine when services should resume.

Interruption status is not appropriate if no identified services remain to be provided; instead, the service record should be closed.

**C-424-10: Completion of VRT Services**

VRT services are completed when:

* all goals on the VRT Training Recommendations have been completed; and
* the VR counselor and the VRT agree that all VRT services needed by the customer have been provided.

The VRT service record is closed when the VRT and VR counselor agree that all recommended VRT services have been provided. The VRT then updates the service record status to:

* "Services Provided or Successful" if the VRT services were provided; or
* "Services Not Provided or Unsuccessful" if no VRT services were provided; and
* writes a "VRT SRVS Completion" case note noting the VR counselor's agreement to close the service record as well as other pertinent information.

**C-424-11: VRT Case Services Management Procedures**

The VRT documents all customer contacts, including all attempts to contact and other pertinent information in case notes using the six core skill headings as needed to document VRT services provided and customer progress.

The following five titles are available in RHW for VRT case notes:

* VRT Assessment Srvs
* VRT Training Recommendations
* VRT Training Srvs
* VRT SRVS Completion
* VRT

The case note title can be edited by beginning with "VRT" and choosing "Add to Topic" to enter additional information. Five examples of edited titles follow:

* VRT Attempt to Contact
* VRT Customer No Show
* VRT Interrupted
* VRT and VRC Staffing
* VRT Tech Screener Services

**Case Transfers**

For transfers within in the field:

* the VRT service record may be closed if additional VRT services are needed (This should be reflected in the staffing and "VRT SRVS Completion" case notes.); or
* the VRT may delegate the service record to another VRT by:
	+ contacting the VRT to whom the service record is being delegated;
	+ providing an update on VRT services; and
	+ documenting this action in a case note.

**Transfers to CCRC**

When a customer is transferred to CCRC, the VRT service record may be closed or put in interrupted status by the field VRT.

**Action List**

For information about Action Lists, see ReHabWorks Users Guide, Chapter 6: Case Actions and Actions List, 6.3.4 Getting an Action List for a Specific Action Type.

**In-House Service Records**

For information about in-house service records, see:

* service records for in-house providers (see ReHabWorks Users Guide: E-200: Case Service Record, E-203-8-12: Creating, Updating, and Canceling Line Items for In-House Services; and
* the checklist for the in-house service records.

The VR counselor updates the service record status regularly to reflect progress in the case. For example, "Active" would indicate training.

One service record at a time is used for VR teacher services. Duplicate service records are closed as "Not Accepted."

**C-424-12: Rehabilitation Supplies and Adaptive Equipment**

**Rehabilitation Teacher Supplies Procedures**

Rehabilitation teacher supplies are known also as "bulk supplies" or "consumable supplies." They are defined as high-usage, low-cost supplies such as watches, bold-line paper, writing guides, and timers. These supplies:

* are ordered from commercial sources;
* exclude items that cost $100 or more per single item;
* are ordered by and shipped to VR offices; and
* are stored at the local office for distribution to customers for demonstration or training later on an as-needed basis.

**Adaptive Equipment**

Adaptive equipment is defined as durable items or devices ordered for a customer (for example, flashlights, talking color-identifiers, talking money-identifiers, and braillers). Adaptive equipment is:

* available only if the least restrictive adaptations do not meet customer needs;
* purchased per customer in RHW; and
* used by customers and, when no longer needed, returned.

The VR counselor documents the justification for purchase of an item before it is ordered. If the value of the equipment exceeds $500, a "customer" inventory tag is attached to the equipment and Form VR2014, Rehabilitation Equipment, Item, and Bus Pass Receipt and Agreement, is signed by the customer.

Adaptive demonstration equipment is defined as agency-owned equipment lent to customers for demonstration and/or training purposes only (for example, closed-circuit televisions, electronic book readers, netbooks, and braillers). The equipment is added to the office inventory account, and a state inventory tag is attached.

For more information, see VRSM D-200: Purchasing Goods and Services.

**Recommending Counselor Purchase of Adaptive Equipment**

The VRT may create an action or email for the VR counselor to recommend the purchase of equipment that is not considered a bulk or consumable supply. Once the VR counselor agrees, the VRT arranges the coordination of the equipment purchase.

Note: Justification must be documented in RHW for all purchase recommendations.

For more information, see VRSM D-200: Purchasing Goods and Services.

**Maintaining Inventory Levels in the Local Office**

VR staff follows these the steps below to maintain inventory levels in the local office:

* Order in bulk to maintain one to two months' inventory level supply of high-usage rehabilitation supplies.
* Order smaller quantities regularly to maintain stock levels rather than ordering large quantities to restock depleted items.
* If large quantities of rehabilitation supplies are needed for such special events as group classes or awareness presentations, a service authorization must be submitted in advance to ensure delivery.

**Accountability Procedure**

Accountability for adaptive supplies and equipment issued to customers is verified by:

* documentation in the VRT case notes;
* review of the case file by the coordinator or manager; and
* maintenance of an established inventory level of supplies in the local office.

**Receipt and Agreement Form**

Although not mandatory, Form VR2014, Rehabilitation Equipment, Item, and Bus Pass Receipt and Agreement, may be used to document receipt of VRT training supplies with a value of less than $500. Form VR2014, which requires the customer's signature acknowledging receipt of the equipment and indicating agreement to conditions for its use, is useful in helping the customer understand his or her responsibility related to depleted or damaged equipment.

**Texas Confidence Builders Model**

Texas Confidence Builders Model involves philosophy with supporting techniques for creating the foundation for how staff members work with blind and visually impaired customers and how to deliver services. The model incorporates the belief that with the proper training and a positive attitude, individuals with disabilities can live productive, independent lives and become successfully employed in a field of their choice. The six core skill areas that are addressed are as follows:

* Adjustment to Blindness
* Independent Living Skills
* Travel Skills (orientation and mobility)
* Communication Skills
* Support Systems
* Vocational Skills

See the Texas Confidence Builders Model brochure (PDF) found under Brochures and Publications on the Intranet page for more information.

**C-425: Deafblind Field Training Services**

Deafblind services are offered to blind customers who have a secondary disability of deafness or hearing impairment. Customers are referred to Deafblind Services by:

* VR counselors;
* CCRC staff;
* Transition counselors; and
* Independent Living Services for Older Individuals Who Are Blind caseworkers.

**C-425-1: Services Provided**

As in-house service providers, deafblind specialists provide such services as:

* meeting with customers to evaluate their needs related to their dual sensory loss;
* making recommendations to caseload-carrying staff about:
	+ communication issues and options;
	+ diagnostics and evaluations;
	+ adaptive devices and other accommodations for work, independent living, and vocational or academic training;
	+ specialized training options;
	+ ongoing support services, such as Medicaid waiver programs;
	+ training options for teens and young adults who are deafblind; and
	+ support services, resources, and adaptive devices for teens and young adults for use in the educational environment;
* attending admission, review, and dismissal meetings and participating in transition planning in collaboration with the transition counselor;
* facilitating communication and identifying interpreter services; and
* initiating orders for recommended adaptive devices, with the approval of the caseload-carrying staff member.

**C-425-2: Referrals to Deafblind Services**

Customers are referred to Deafblind Services when:

* hearing loss is medically documented;
* hearing loss is suspected; or
* the customer is functioning as a person who is deafblind.

If it is suspected that a customer may have hearing loss or if the customer has a documented hearing loss, the VR counselor refers him or her to the deafblind specialist before scheduling audiological or hearing-aid evaluations. The deafblind specialist may let the customer know about information to share with his or her audiologist regarding the functional impact of the combined vision and hearing loss and suggest questions to ask the audiologist about certain hearing-aid features and considerations.

**C-425-3: Referral Procedure**

The VR counselor makes a referral to the deafblind specialist by:

* entering a secondary disability code of Deafblindness (08) under the category of Sensory Communicative Impairments for the customer to be referred; and
* completing a referral to the deafblind specialist in RHW.

**C-425-4: Customer Contact**

Upon receipt of referral information, the deafblind specialist:

* contacts the customer;
* schedules an appointment with the customer in his or her home or business;
* evaluates the customer's needs during the home or work appointment;
* discusses immediate needs and evaluation findings at that time; and
* verifies that the customer meets the definition of deafblindness as described by the Rehabilitation Services Administration.

**C-425-5: Case Notes**

The deafblind specialist writes case notes to document customer contacts and other pertinent details. A follow-up phone contact or email may be added to the contact reports.

The case notes typically contain:

* customer contact participants;
* evaluation findings;
* overall recommendations;
* the rationale for recommendations; and
* recommendations regarding secondary disability coding, if needed.

If the deafblind specialist recommends that the secondary disability coding be amended to reflect the customer's sensory communicative impairment more accurately, the deafblind specialist:

* enters a case note to recommend that the caseload-carrying staff member change the secondary disability coding and explain the reason a change is needed; and
* creates an action and delegates it to the caseload-carrying staff member to alert him or her to the case note which recommends that the secondary disability coding be changed.

**C-425-6: Continued Service**

The deafblind specialist makes periodic phone contacts and/or written contacts with the customer and VR counselor to monitor progress, discuss service coordination, and help as requested and needed.

**C-425-7: Completion of Deafblind Services**

The deafblind specialist closes the RHW service record when services are:

* complete; or
* no longer desired.

Following case closure or closure of the service record, the deafblind specialist may provide limited services as a professional courtesy to help a customer maintain independence and to minimize the customer's need to reapply for VR services. These services are documented as a courtesy service in the case file.

For more information, including information about community-based apartment-living and residential-training services, refer VRSM C-505-3: Deafblind Training.