# VR Services Manual E-300: Case Note Requirements

Revised on February 3, 2020

| **Case Note Topic** | **Staff Use**  | **Documentation** | **VRSM Ref.** |
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| Counseling and guidance | VR counselor use only | A case note or series of case notes entered by the VR counselor that reflects the skillful application of counseling strategies and interventions. These case notes must include the:* **issue** addressed through C&G that are related to the impediments to employment, IPE, and/or participation in VR services;
* **strategies** for resolution of the issue to include description of decision-making processes involved;
* **customer’s participation** in the resolution;
* **customer’s reaction**; and
* **actions required** of the customer or counselor.

**REQUIREMENT:** C&G must be provided on the same day the IPE is completed and documented in RHW within 7 calendar days of the completion of the IPE as a C&G case note with the add to topic of “IPE Implemented”.**TIP**: As with other case notes, the writing style and format of a C&G case note can be individualized by the VR counselor if the required content is included.**TIP**: C&G frequency is **not** the same as basic frequency of contact or “FOC” on the IPE. C&G must be completed by a counselor; FOC can be maintained by any VR staff. FOC is evaluated in the IPE services section of a Compliance and Quality Case Review. However, C&G does count as a contact for the purpose of tracking FOC. **TIP**: When counseling and guidance is provided during the completion of the joint annual review or when completing an IPE amendment, the compliance and quality criteria for counseling and guidance must also be met and clearly documented for this to count as a counseling and guidance case note for the purpose of a case review.  | B-504-12C-102 |