# VR Services Manual E-300: Case Note Requirements

Revised February 1, 2022

…

|  |  |  |  |
| --- | --- | --- | --- |
| 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.” C&G must also be documented at the frequency agreed upon on the IPE.  **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**: C&G must be entered using the case note title, “Counseling and Guidance.” When C&G is provided during other meetings, such as the joint annual review or IPE Amendment, document the C&G in an additional case note titled, “Counseling and Guidance.”  **TIP**: For C&G related to the Supported Employment Job Stability Meeting and the Supported Employment Closure Meeting, specific information must be documented in these C&G case notes. For additional C&G case note requirements, refer to VRSM C-1206-4 and C-1206-5. | B-504-12  C-102 |