# VR Services Manual E-300: Case Note Requirements

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## Overview of Table

This table reflects the content found in the VRSM as of the revision date this document. Unless otherwise specified, the content of more recently updated sections of the VRSM and other relevant policy manuals or guidance memorandums supersede instructions included in this table. Staff are expected to review the referenced policy content before taking any action on a case.

For additional policies and procedures related to case note documentation, refer to [VRSM D-302-1: Overview of Case Notes](https://twc.texas.gov/vr-services-manual/vrsm-d-300#d302-1) and [D-302-3: What Not to Include in Case Notes](https://twc.texas.gov/vr-services-manual/vrsm-d-300#d302-3).

## Documentation in Vocational Rehabilitation

Case notes are critical components of the VR case. They allow VR staff to tell the story of the customer’s case from start to finish and document compliance with published policy and procedures. They demonstrate the VR counselor-customer working relationship, the customer’s journey, and how the customer made informed decisions. Documentation in VR should allow any potential audience member to understand the decision-making process, justification for services, and how those services will help the customer achieve the employment goal and address barriers to employment. When a decision is made on a case, the reason for the decision is explained and documented. If there are delays in the case, such as delays moving to the next phase in the VR process or service delays, case notes explain what happened.

Good documentation is objective, professional, compliant, effective, and easy to read.

## How to Tell the VR Story

The VR counselor uses the requirements in E-300 as a guide for writing individualized case notes. The case note requirements in this document ensure case notes remain compliant with policy, procedures, and regulations and justify decision-making.

When writing case notes, important questions to consider include:

* What is being done to address the disability and related functional limitations that made the customer eligible for VR services?
* What contribution is Counseling and Guidance making toward the customer’s employability?
* What is being provided to the customer for the purpose of becoming employed, why is it necessary, and who is providing it?
* What is the progress toward employment?
* What actions will happen next? Who is responsible for what?

TIP: Refer back to these questions frequently to ensure documentation is covering all the important facts of the case.

## Delegating Required Documentation

Documentation responsibilities cannot be delegated and must be entered in RHW directly by the individual completing the action that is being documented.

## Case Note Requirements

| **Case Note Topic** | **Staff Use**  | **Documentation** | **VRSM Ref.** |
| --- | --- | --- | --- |
| **…** |  |  |  |
| Purchasing Pre-review | Administrative supervisor, purchasing specialist, or the final approver (e.g., the VR Manager) if there are other approvals required before the purchase | A case note that confirms that: * the purchase is clearly connected to and supportive of the vocational objective;
* policies and procedures for type of purchase have been applied correctly;
* purchase is included in IPE, IPE amendment, or in a case note with all service justification elements included;
* exploration and application of available comparable benefits is documented;
* BLR has been calculated and applied correctly;
* correct specification levels are used to create service record; and
* required consultations and approvals have been completed, when applicable.

**TIP**: When a RHW Purchase Approval is required, the pre-purchase review is completed AFTER the RHW Purchase Approval is completed.**TIP**: If an approver has reviewed and documented an element of the pre-purchase review requirements as part of their approval prior to the pre-purchasing review, the staff completing the pre-purchase review does not have to duplicate these efforts during their review or documentation of the review. | D-205-2 |

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