

# Vocational Rehabilitation Services Manual C-1400: Supportive Goods and Services

Revised: March 1, 2020

## C-1401: Maintenance

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### C-1401-7: Processing Maintenance Payments

Maintenance may be authorized and paid in advance.

Maintenance checks, or warrants, are mailed:

- directly to the customer or legally appointed third-party payee; or
- to the VR field office in exceptional circumstances and only with the VR Manager's approval. Refer to D-207-5: Customer Warrants Mailed to the VR office.

#### Maintenance Service Authorizations

A service record must be created with the following specifications for maintenance:

- Level 1—Maintenance—93150
- Level 2—Maintenance, One Time—93150-90335
- Level 2—Maintenance, Recurring—93150-90340
- Level 2—Maintenance, Third Party, and Short-Term Housing—93150-90330

Choose the appropriate Level 3 and 4.

## C-1402: Transportation Services

Transportation is a type of financial support that can be paid directly to an individual who has applied for and/or is receiving VR services or to a third party that will provide the transportation. Transportation payments may not be used to pay for any “normal living expenses.”

VR pays transportation to the customer for the use of the customer's vehicle for transportation when this is the most economical and effective method.

VR uses the following categories of transportation:

- Recurring transportation paid to a public or private carrier,

- Nonrecurring transportation paid to a public or private carrier, and
- Airfare.

To be approved, all transportation expenditures must be clearly documented in the case file as necessary and reasonable under the circumstances prevailing at the time a decision is made.

Decision-making factors to consider include, but are not limited to:

- Customer's informed choice,
- Best value,
- Use of comparable benefits, and
- Required customer participation in cost of services (also referred to as BLR).

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

If transportation assistance is anticipated at the time the Individualized Plan for Employment (IPE) is completed, it must be included on the customer's IPE. However, if the need for nonrecurring transportation is identified after the IPE has been completed, a service justification case note can be used to document this service. All recurring transportation must be included on the IPE or IPE amendment.

Refer to B-500: Individualized Plan for Employment for more information on IPEs.

Refer to E-300: Case Notes Requirement for more information on documentation.

## **C-1402-1: Legal Authorization**

### **34 CFR §361.5(c)(56)**

"Transportation means travel and related expenses that are necessary to enable an applicant or eligible individual to participate in a vocational rehabilitation service, including expenses for training in the use of public transportation vehicles and systems."

If a warrant is issued to a customer or other individual who owes the state delinquent taxes, defaulted debt, or other funds, receipt of that payment could be subject to substantial delays. Reference: Texas Government Code Chapter 2252.

## **C-1402-2: Transportation Providers**

Transportation can be provided through the following:

- Public carrier
- Private carrier

Transportation of a customer for any purpose must be by the most economical and effective carrier.

Criss Cole Rehabilitation Center (CCRC) staff members who are formally approved to transport customers may do so but must drive only TWC-owned vehicles. Exceptions to this require consultation with the VR Division Deputy Director of Field Services Delivery and the Office of General Counsel.

With the exception of CCRC staff who are approved to transport customers, VR staff members are not allowed to transport VR customers. There are no exceptions allowed to this restriction.

### **Public Carrier**

A public carrier is a vehicle or set of vehicles in the business of transporting the public, for example:

- city transit service;
- airline;
- bus company; and
- taxi company.

### **Private Carrier**

A private carrier is an individual or private organization that owns a vehicle and is not customarily for hire.

### **C-1402-3: Recurring Transportation**

Recurring transportation includes payments to the private carrier for transportation that is necessary for the customer to participate in VR services.

VR Manager approval is required for any additional recurring transportation that exceeds a total of 104 weeks. The approval is limited to six-month increments (cumulatively or consecutively).

Transportation costs that are more than \$200 for a single service authorization require:

- VR Manager approval; and
- a service justification case note that includes:
  - calculations,
  - the source used to define "actual mileage," and
  - confirms the service for which transportation is required.

Service authorizations must not be split. When applicable, the SA is issued with multiple line items. For more information refer to D-203-6: Ethics of Purchasing.

## Documentation of Recurring Transportation

Documentation for recurring transportation must include:

- VR Manager approval; and
- a service justification case note that includes:
  - calculations,
  - the source used to define "actual mileage," and
  - confirms the service for which transportation is required.

Customers must be informed that they are required to maintain the VR2181, Transportation Log, to verify that the transportation funds were used for their intended purpose. The customer must turn in the VR2181 Transportation Log monthly, which must be reviewed by the VR counselor before the next payment is authorized.

If the VR2181 Transportation Log, for recurring transportation is not turned in or if it is determined that the funds were not used for their intended purpose, VR Manager review and approval is required before additional transportation payments can be authorized or any new service authorizations for transportation are issued.

VR Manager review and approval must be documented in ReHabWorks (RHW). See RUG-E-100: Purchase Approval Requests for additional information about RHW Purchase Approvals.

## Documentation of Recurring Bus Passes for Customers

Documentation for bus passes must include:

- a service justification case note or be included in the IPE or IPE amendment;
- the quantity of bus passes needed to support the VR service, and
- a service justification that confirms the service for which transportation is required.

If the VR office purchases bus tickets in bulk and issues them directly to the customer, a case note must be entered in RHW identifying the date the customer picked up the bus pass. A copy of the VR2014 Rehabilitation Equipment, Item, and Bus Pass Receipt signed by the customer must be filed in the customer's paper case file. Refer to C-1402-6 Local Bus Passes for VR Customers for more information.

Customers must be informed that they are required to maintain the VR2181, Transportation Log, to verify that the bus passes are being used for their intended purpose. The VR2181 must be turned in and reviewed by the VR counselor before the next bus pass is issued or purchased.

If the VR2181 Transportation Log for recurring transportation is not turned in, or if it is determined that the funds were not used for their intended purpose, VR Manager review

and approval is required before additional transportation payments can be authorized or any new service authorizations for transportation are issued.

VR Manager review and approval are required for any additional bus passes that exceed 6 calendar months.

### **C-1402-4 Nonrecurring Transportation**

Nonrecurring transportation is a onetime payment to the private carrier for transportation that is necessary for the customer to participate in a single VR assessment or IPE service.

Transportation costs that are more than \$200 for a single service authorization (this excludes airfare) require:

- VR Manager approval; and
- a service justification case note that includes:
  - calculations,
  - the source used to define "actual mileage," and
  - confirms the service for which transportation is required.

### **Documentation of Nonrecurring Transportation**

Documentation for transportation must include:

- VR Manager approval; and
- a service justification case note that includes:
  - calculations,
  - the source used to define "actual mileage," and
  - confirms the service for which transportation is required.

### **Documentation of Nonrecurring Bus Passes for Customers**

Documentation for transportation must include:

- a service justification case note or be included in the IPE or IPE amendment;
- the quantity of bus passes needed to support the VR service, and
- a service justification that confirms the service for which transportation is required.

If the VR office issues bus passes, a case note must be issued in RHW identifying the date the customer picked up the bus pass. A copy of the VR2014 Rehabilitation Equipment, Item, and Bus Pass Receipt signed by the customer must be filed in the customer's paper case file. Refer to C-1402 Local Bus Passes for VR Customers for more information.

## **C-1402-5: Processing Transportation Payments**

VR staff must email VR RHW Data Maintenance to have the customer established as a provider when the amount is more than \$400 for a single service authorization. Refer to D-211: Setting Up and Paying Providers for more information.

VR staff must authorize the payment of transportation in advance to the customer. The allowable transportation payment rates listed below are based on the rates published on the Texas Comptroller of Public Accounts website. VR reviews and, when necessary, updates these rates annually.

As of (insert date of update), transportation payments (recurring or nonrecurring) are limited to one of the following:

- Actual cost to customer for public transportation
- Actual mileage times the federal privately-owned vehicle mileage rate published on the Texas Comptroller of Public Accounts website.

For a history of the VR rates, refer to the VR Transportation Rates page (internal access only, but copy may be requested from any VR office).

Do not use "Maintenance" specifications in RHW to make transportation payments.

Do not split service authorizations to avoid threshold requirements based on specific dollar amounts.

Transportation warrants are mailed:

- directly to the customer or legally appointed third-party payee; or
- to the VR office in exceptional circumstances and only with VR Manager approval. Refer to D-207-5: Customer Warrants Mailed to the VR Office.

## **Transportation Service Authorizations**

A service record must be created with the following specifications for transportation payments:

Level 1—Transportation and Relocation Services—78111

Choose the appropriate level: Level 2, 3, or 4.

## **C-1402-6: Local Bus Passes for VR Customers**

With the VR Manager's approval, the management support team purchases local bus tickets, passes, tokens, and transfers in bulk for VR customers. Bus passes are distributed to VR customers that are directly related to and required for their

participation in VR services. Once received in the VR office, the bus passes must be kept under lock and key.

When the need for bus passes are identified the:

- 1) VR counselor must enter service justification case note in RHW justifying the need for transportation,
- 2) Customer/representative must be present and sign the VR2014 Rehabilitation Equipment, Item, & Bus Pass Receipt once they receive the bus pass,
- 3) Staff will request bus pass from the management team or designee,
- 4) VR staff are required to enter date and customer's name and case ID number onto the VR2015 Office Bus Pass Log,
- 5) Management team or designee will also sign VR2015 Office Bus Pass Log,
- 6) Once the VR2014 Rehabilitation Equipment, Item, & Bus Pass Receipt document has been completed VR staff are required to place it in the customer's case paper case file, and
- 7) The VR2015 Office Bus Pass Log must be kept with the management team.

Refer to C-1402-3: Recurring Transportation and C-1402-4 Nonrecurring Transportation additional information.

## **C-1402-7: Airfare**

Airfare can be purchased to meet a customer's transportation needs only if:

- airfare is the most cost-effective method (flying versus driving);
- airfare is an appropriate means of transportation for the customer based on potential disability-related factors; or
- no reasonable alternative exists.

When considering the cost of airfare as a transportation alternative, the VR counselor considers all related costs, such as the cost of transportation to and from the airport, parking, vehicle rental, fuel, or taxi. The VR counselor documents the cost comparison clearly in a case note.

Customer airfare purchases are completed using the Customer Central Billed Account (CBA).

Using the CBA for customer airfare purchases allows caseload-carrying staff members to purchase customer airfare at state-contracted rates.

In addition to reducing airfare costs for customer travel, using the CBA has the following benefits:

- Advance purchase is not necessary
- No minimum or maximum length of stay
- 100 percent refundable tickets if cancelled or unused

When using the CBA, reservations must be made at least 14 days in advance and ticketed at least seven days in advance to allow for review and to ensure that the itinerary is acceptable to the customer. For travel being requested during holiday periods (October through January), reservations must be made at least 30 days in advance.

### **Requesting Customer Air Travel**

The VR staff member:

- completes and signs [VR1762, Central Billing Request for Customer Airfare](#), and include the service authorization number in the Comments field (see [ReHabWorks Users Guide, Chapter 16: Case Service Record, 16.2.10 Customer Airfare](#) for details); and
- emails the signed VR1762 to the Accounting–Customer Airfare Team at [Payables.CustomerCustomerAirfare@twc.state.tx.us](mailto:Payables.CustomerCustomerAirfare@twc.state.tx.us).

On VR1762, VR staff notes any special needs or requirements that the customer or passenger may have. For example, VR staff documents whether the customer:

- needs to be on a specific flight to travel with a group;
- requires accommodations; or
- requires special seating (describe the circumstances).

### **Reserve and Verify Customer Airfare**

The following procedures must be used to book and verify the travel:

1. Accounting–Consumer Airfare Team authorizes the charge to the Customer CBA.
2. Travel agency books the airfare and emails the reservation and ticket confirmation itinerary to the Accounting–Consumer Airfare Team.
3. Accounting–Consumer Airfare Team maintains a printed copy of the itinerary in the Customer CBA and forwards the confirmation by email to the VR staff member who requested the travel.
4. The VR staff member must respond by email to the [Consumer Airfare](#) mailbox to confirm that the forwarded itinerary is acceptable.
5. The VR staff member, upon confirming the itinerary as acceptable, completes a service record and service authorization using the date, purchase price, and fees information provided. (Note: The VR staff does not create the service authorization for payment now; this will be done in step 8.)




6. The customer or passenger must provide the itinerary or confirmation number and a valid driver's license, photo ID, or other acceptable proof of identification. (Acceptable forms of identification are found at [Transportation Security Administration Identification](#).)
7. The VR staff member receives a mass email from the Accounting–Consumer Airfare Team paying the bank statement once the customer's travel is shown on the bank statement. (Note: The email names all customers that traveled within that bank statement period. The VR staff copies and redacts names of all other customers from the document before filing with the customer's purchasing records.) See [ReHabWorks Users Guide, Chapter 16: Case Service Record, 16.2.10 Customer Airfare](#) for details.
8. The VR staff member adds the service authorization number in the appropriate column for the customer.
9. Accounting verifies and audits the service authorization and lets the VR staff member know when he or she can receive and authorize payment for the customer's travel.

### **Processing the Payment**

For the Accounting–Consumer Airfare Team to process the payment for customer travel, the VR team must have created the service record and service authorization in RHW.

If discrepancies are noted between the service record, service authorization, or invoice received by the Accounting–Consumer Airfare Team, a team member emails the VR team to resolve the differences.

### **Cancelled Flights**


The ticket is paid for using a VR CBA credit card. If the customer's ticket requires cancellation, the VR team must notify the Accounting–Customer Airfare Team immediately by email at [Payables.CustomerCustomerAirfare@twc.state.tx.us](mailto:Payables.CustomerCustomerAirfare@twc.state.tx.us) or by phone at 512-463-1671 , option 4, for immediate assistance. The following responsibilities and conditions apply:

- The customer is not authorized at any time for any reason to make any changes or cancel his or her flight itinerary. Additional costs incurred will be the responsibility of the customer. The customer must go through the VR team to make any changes or cancel flight itinerary.
- The VR team is responsible for closing the service authorization in RHW. For all state-purchased Short's Travel itineraries, a cancellation fee is assessed.

## **Airfare Limits**

Air transportation for customers who are attending in-state or out-of-state training is limited to no more than two round-trip economy tickets per year. Exceptions require review and approval by Regional Director.

If there are questions regarding customer airfare procedures, contact the Accounting–Consumer Airfare Team in one of the following ways:

- Email [TWC Consumer Airfare](#)
- Phone 512-463-1671 , option 4

## **C-1402-8: Relocation**

If the customer cannot participate in IPE services or employment because transportation is not available, the VR counselor discusses with the customer the option of relocating to a community that meets the customer's transportation needs.

If the customer decides to move, then the VR counselor determines the extent of help necessary to achieve the move. Some customers require minimal help (for example, helping to pay for moving van rental, mileage, and boxes) while others, because of disability-related limitations, may require full assistance (such as packers, movers, and unpackers).

If the VR counselor plans to purchase services from a moving company, he or she contacts TWC Consumer Procurement at [Consumer.procurement@twc.state.tx.us](mailto:Consumer.procurement@twc.state.tx.us) for help in determining if using a state term contract results in best value.

Payment of deposits, for example refundable rental or utility deposits, on behalf of customers is not allowed by the Comptroller's State of Texas Purchase Policies and Procedures Guide, and VR Managers may not approve these purchases.

## **C-1402-9: Vehicle Repair**

As with other transportation services, VR provides payment for the repair of the customer's vehicle only when necessary for the customer to participate in other planned services, such as vocational training and job-related services.

### **Payment for Vehicle Repair**

Payment for vehicle repair, including parts and labor, is authorized only when:

- no comparable services or benefits are available to meet this customer's transportation needs; and
- repair is the most cost-effective means to meet those needs.

Authorization covers only repairs that are required to make the vehicle safe and operable.

### **Approval Requirements**

VR Manager approval is required for vehicle repairs when the total cost of the repair is greater than \$250, but less than \$1,000.

Regional director approval is required for vehicle repairs when the total cost of the repair is greater than \$1,000, or when the total cost exceeds the vehicle's value.

### **Documentation Requirements**

Before authorizing payment, the VR counselor considers and documents in a case note that:

- the vehicle is:
  - owned by the customer or a family member (if not, VR Manager approval is required); and
  - the customer's primary means of transportation;
- vehicle repair is a best-value decision to meet the customer's transportation needs, and:
  - based on the vehicle's overall condition, ongoing repairs are not expected; and
  - repair costs do not exceed the vehicle's value as estimated from Kelly Blue Book using the "sell to private party" value (After the VR counselor reviews and makes the decision to authorize the service, he or she prints and files a copy of the computer-generated estimate in the paper case file.);
- there are no comparable services and benefits available to meet the customer's transportation needs, such as public bus service; and
- the customer has a plan for how to meet transportation expenses after case closure.

For additional information about repairs to vehicle modifications, see [C-204: Vehicle Modification Services](#).

### **C-1402-10: Vehicle Rental**

Vehicle rental can be purchased if:

- it is economically justified; and
- no reasonable alternative exists.

## **Approval Requirements**

VR Manager approval is required for vehicle rentals lasting 1-60 calendar days.

Regional director approval is required for vehicle rentals lasting more than 60 days.

## **Required Vehicle Rental Procedures**

VR staff obtains two quotes for an economy class vehicle from a reputable auto rental agency or vehicle modification provider. If the customer requires a higher class of vehicle, document the justification for management review. (Note: Do not request state rates, because only state employees may use them.)

VR staff obtains copies of documents for the customer's case file that confirm that the customer or the customer's driver is:

- over 21 years old;
- has a valid driver's license; and
- has proof of insurance.

If the customer or his or her driver does not have collision insurance, VR may pay the rental agency's additional daily rate for required insurance. VR does not pay for personal accident insurance.

The customer is responsible for:

- returning the rental vehicle in the condition in which it was received; and
- paying any costs above and beyond the original rental agreement.