**Vocational Rehabilitation Services Manual B-500: Individualized Plan for Employment**

Revised July 1, 2019

## B-504: Content of the IPE

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### B-504-5: Planned Services

The IPE must include all substantial goods and services and any anticipated ancillary or supportive goods and services that are necessary for the customer to reach the identified employment goal. There must be a clear association between the identified good or service, the customer's disability, and the employment goal.

The VR counselor must review carefully the published policies and procedures for each good or service before including it on the customer's IPE.

If consultations or approvals are required for a specific good or service, these must be completed and documented by the consultant or approver in a RHW case note before the good or services is included in the customer's IPE. Refer to E-200: Summary Table of Approvals, Consultations, and Notifications.

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#### Supportive Goods and Services

Supportive goods and services are those that are necessary for a customer to participate in

* assessments to determine eligibility for VR services and identify VR needs; or
* substantial VR services that are included in the IPE or the current IPE amendment.

If a supportive good or service is anticipated at the time the IPE is completed, it should be included on the customer's IPE.  However, if there is a change to a planned supportive service or if the need for a supportive service is identified after the IPE has been completed, then an IPE amendment is not required; a service justification case note can be used to document this change. The service justification case note must clearly document how the good or service supports a substantial service that is included on the customer's IPE.

Examples of supportive goods or services may include interpreter services, unplanned supplies and tutors. For more information on supportive goods and services, refer to C-1400: Supportive Goods and Services.

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#### Dates of Service

The dates of service on the IPE should clearly reflect the total time that it will take the customer to complete all IPE services, reach the identified employment goal, and meet the requirements for successful case closure.

The start date can be no earlier than the date that the IPE is signed.

For each service:

* enter the date that the service is expected to begin as the start date; and
* enter the date that each service is expected to end as the end date.

If it becomes apparent that the start or end dates for a specific service falls outside the parameters of the dates identified on the IPE, and if the service:

* is an ancillary service or a service that supports a substantial service that is on the IPE - this change can be documented in a service justification case note;
* is a substantial service, this change must be documented in an IPE amendment.

If services dates expire for a substantial service included in the IPE, an amendment must be completed.

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### B-504-9: Frequency of Contact for an IPE or IPE Amendment

Contact with a VR customer is interaction with the customer or representative through direct face-to-face communication, phone calls, written correspondence, or electronic communications, such as email. All communications with customers must be confidential and secure. For instructions on encrypting electronic communications, see [Instructions for Encrypting Files](http://intra.twc.state.tx.us/intranet/its/html/iris_security_notes.html).

Note: Text messaging, even from an agency device, is not a secure means of communication. VR staff must not communicate sensitive information such as personal identifying information (PII) with VR customers through non-secure means. VR staff must comply with all policies and procedures in the [TWC Privacy Manual (PDF)](http://intra.twc.state.tx.us/intranet/gc/docs/privacy-manual.pdf).

The frequency that the VR office maintains contact with a VR customer, also referred to as "FOC", varies based on the customer's individual circumstances and needs. For example, one customer who is attending college may only need periodic contacts throughout the semester or at the beginning and end of each semester. A customer that is actively engaged in more intensive services, such as Project Search or Supported Employment, may require monthly contacts.

FOC can change as needed throughout the life of the case. If FOC changes from a lower number of days to a higher (less frequent) number of days, an IPE amendment is required. If FOC changes from a higher number of days to a lower (more frequent) number of days, an IPE amendment is not required.

For example, if the FOC on the IPE is identified as 60 days, but the customer needs weekly FOC for a period of time, then FOC can be provided weekly and the IPE does not need to be changed since this is within the minimum threshold of the timeframe selected on the IPE.

The minimum FOC with the customer should be clearly stated on the customer's IPE. Substantive customer contact may be made by a VR counselor, Rehabilitation Assistant, or other VR staff, and occurs as often as necessary. Each of these contacts will count towards meeting the required FOC that is identified on the IPE.

When VR staff initiates contact with the customer or representative with no response, it is documented as an attempted contact. When the customer is not able to be contacted prior to closing the case, refer to B-605: Customer Notification. For information on documentation refer to E-300: Case Notes Requirements.

**B-504-10: Frequency of Counseling and Guidance**

For information on counseling and guidance refer to C-102-1: Frequency of Counseling and Guidance.

**B-504-11: Signatures**

A valid IPE must be signed by the VR customer or, as appropriate, the customer's representative, and approved and signed by a qualified vocational rehabilitation counselor employed by TWC-VR. For more information refer to B-204-7: PIN Procedures.

Under no circumstances does the IPE or IPE amendment take effect or allow for payment of any service until it is agreed to and signed by the customer or the customer's representative and the VR counselor.

Note: In addition to being included on the customer's IPE, purchased services must also be authorized in advance with a service authorization that is generated by RHW. For more information about required purchasing processes and procedures, refer to [D-200: Purchasing Goods and Services](https://twc.texas.gov/vr-services-manual/vrsm-d-200).

#### Customer or Representative Signatures

The VR counselor reviews with the customer or the customer's representative, his or her rights and responsibilities, as stated on the IPE, and provides him or her with a copy of the "Can We Talk" brochure before asking them to sign the IPE.  The customer or required, the customer's representative, must sign and date an IPE after the IPE has been developed and agreed upon by both the customer and the VR counselor.

When the IPE is not available in RHW, print the [VR5163, Individualized Plan for Employment (IPE)](https://twc.texas.gov/forms/index.html), and:

* have the customer sign it;
* place the signed VR5163 in the case folder;
* document in the case note that the VR5163 was signed; and
* enter the IPE into RHW and enter a pseudo PIN.

For more information about PINs, see the [ReHabWorks User Guide, Chapter 8: PINs](https://online.twc.state.tx.us/services/rhwhelp/ch8.htm).

**VR Counselor Signature**

The VR counselor reviews and approves the IPE after considering:

* results of the comprehensive assessment;
* the customer's unique strengths, resources, priorities, concerns, abilities, capabilities, career interests, and informed choice; and
* applicable TWC-VR procedures.

If the VR counselor does not agree with content that the customer is requesting to be included in the IPE, the VR counselor should not sign the IPE, but discuss specific points and problem areas with the customer.

If, after discussing the concerns with the proposed IPE, the customer and the VR counselor cannot come to an agreement on the content of the IPE, the VR counselor informs the customer of his or her rights, as outlined in the "Can We Talk" brochure. The VR counselor documents the status of the pending IPE and notifies the VR Supervisor.  If needed, an Extension of Time for completing the IPE may be necessary.  Refer to [B-503-1: Extension of Time for IPE](https://twc.texas.gov/vr-services-manual/vrsm-b-500#b503-1) for more information.

**B-504-12: IPE Documentation Requirements**

The content that is included in the customer's IPE is documented in the comprehensive assessment case note. Refer to [E-300: Case Notes Requirements (Word)](https://twc.texas.gov/files/partners/vrsm-e-300.docx) for additional information.

## B-505: Joint Annual Review and IPE Amendments

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### B-505-1: Joint Annual Review

When completing a JAR, the VR counselor meets with the customer and, as appropriate, the customer's representative to

* review the details in the current IPE or IPE amendment;
* determine if there is a need to complete an IPE amendment;
* review and update the information captured in RHW at time of application for services (such as contacts, financial information, and release forms); and
* document the joint annual review (JAR) in a case note.

#### JAR Documentation

The JAR case note must include a specific review of all required elements of the IPE, including a review of the progress made toward reaching the employment goal. This includes a review of the

* Employment goal
* Intermediate objectives
* Progress
* Planned services and goods (including providers and service dates)
* Comparable benefits
* Customer participation in cost of services
* Roles and Responsibilities

If the JAR does not result in substantive changes in the employment goal, the VR services to be provided, or the providers of the VR services, then an amendment is not required. Include a statement in the JAR case note to confirm that both customer and VR counselor agree that no changes are needed.

If the JAR results in substantive changes in the employment goal, the VR services to be provided, or the providers of the VR services, then an IPE amendment is required.  The results of the JAR can be documented in the IPE amendment case note.

If the JAR results in a need for new diagnostics to determine whether new services are needed, an IPE amendment is not necessary.  A service justification case note must be written in RHW explaining the necessity for the new diagnostics.  Once the results have been received and reviewed by the VR counselor and customer, if new services are required and agreed upon, an IPE amendment will be necessary to cover those services.

If the JAR results in a need for only new ancillary or supportive services to support services that already exist on the IPE or current IPE amendment, an IPE amendment is not required; instead, a service justification case note can be used to document the need for and authorization for these services. The start and end dates for the ancillary or supportive service must not go past the end date for the associated service on the IPE.

Refer to [E-300: Case Notes Requirements](https://twc.texas.gov/files/partners/vrsm-e-300.docx) for additional information.

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