# VR Services Manual E-300: Case Note Requirements

Revised January 15, 2021

## Case Note Requirements

| **Case Note Topic** | **Staff Use**  | **Documentation** | **VRSM Ref.** |
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| ATF Ancillary SA (After the Fact Ancillary Service Authorization) | Any VR staff | A case note entered by VR staff member that is requesting, approving, or denying a request to issue a ATF ancillary SA. RequestThe “Add to Topic” for a request includes the specific good or service and the purpose of the case note, such as “Training ATF Ancillary SA Request” or “Medical Services ATF Ancillary SA Request”.The case note content must include the following: * what is being requested (include specific good or service, provider, and anticipated dates of service);
* circumstances supporting the request; and
* name and job title of requester.

**TIP:** Verify the required management approval level per applicable policy prior to documenting the request to ensure that it is routed to the correct approver in a timely manner.Approval or DenialThe “Add to Topic” for an approval or denial includes the specific good or service and the specific decision (“approved” or “denied”), such as “Training ATF Ancillary SA – Approved.”The case note content must include the following:* the parameters of the approval or denial (include specific good or service, provider, and when applicable, the date range of the approval);
* type of review completed in TxROCS (if applicable); and
* name and job title of staff making decision.

**TIP:** Verify the required management approval level per applicable policy prior to documenting the approval or denial to ensure that you are the correct approver. | D-204-3 |
| ATF Backdated SA (After the fact Backdated Service Authorization) | Any VR staff | A case note entered by VR staff member that is requesting, approving, or denying a request to issue a backdated SA. RequestThe “Add to Topic” for a request includes the specific good or service and the purpose of the case note, such as “Training ATF Backdated SA Request” or “Medical Services ATF Backdated SA Request”.The case note content must include the following: * what is being requested (include specific good or service, provider, and anticipated dates of service);
* circumstances supporting the request; and
* name and job title of requester.

**TIP:** Verify the required management approval level per applicable policy prior to documenting the request to ensure that it is routed to the correct approver in a timely manner.Approval or DenialThe “Add to Topic” for an approval or denial includes the specific good or service and the specific decision (“approved” or “denied”), such as “Training ATF Backdated SA – Approved.”The case note content must include the following:* the parameters of the approval or denial (include specific good or service, provider, and when applicable, the date range of the approval);
* type of review completed in TxROCS (if applicable); and
* name and job title of staff making decision.

**TIP:** Verify the required management approval level per applicable policy prior to documenting the approval or denial to ensure that you are the correct approver. | D-204-2 |

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| ATF Replacement SA (After the Fact Replacement Service Authorization) | Any VR staff | A case note entered by VR staff member that is requesting, approving, or denying a request to issue a ATF Replacement SA. RequestThe “Add to Topic” for a request includes the specific good or service and the purpose of the case note, such as “Training ATF Replacement SA Request” or “Medical Services ATF Replacement SA Request”.The case note content must include the following: * what is being requested (include specific good or service, provider, and anticipated dates of service);
* circumstances supporting the request; and
* name and job title of requester.

**TIP:** Verify the required management approval level per applicable policy prior to documenting the request to ensure that it is routed to the correct approver in a timely manner.Approval or DenialThe “Add to Topic” for an approval or denial includes the specific good or service and the specific decision (“approved” or “denied”), such as “Training ATF Replacement SA – Approved.”The case note content must include the following:* the parameters of the approval or denial (include specific good or service, provider, and when applicable, the date range of the approval);
* type of review completed in TxROCS (if applicable); and
* name and job title of staff making decision.

**TIP:** Verify the required management approval level per applicable policy prior to documenting the approval or denial to ensure that you are the correct approver. | D-204-3 |