# PART E, CHAPTER 5:Approvals and Consultations

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| **Policy Number** | **Authority** | **Scope**  | **Effective Date** |
| Part E, Chapter 5 | N/A | All TWC-VR staff |  10/20/2025 |

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## CASELOAD MANAGEMENT

(See VRSM Part D Chapter 3: Purchasing Goods and Services for additional approval requirements).

| **Situation, Good, or Service** | **Required Action**  | **VRSM Reference** | **RHW Purchase Approval Category** |
| --- | --- | --- | --- |
| Any phase adjustment to a closed case status within the same program year quarter. | VR Supervisor approval | E.3.2 | N/A |
| Phase adjustment to a closed case status outside of the program year quarter  | * Deputy Division Director for Field Services approval and
* email VR RHW Support to phase adjust after approval
 | E.3.2 | N/A |
| Trial Work services for more than 12 months | VR Supervisor approval | B.6 | N/A |
| After-the-Fact (ATF) Service Authorizations | * Deputy Director of Field Services Delivery, or designee
 | D.3 | Use of the case note approval process to document late generation of the SA is required in addition to the relevant RHW Purchasing Approval Workflow when required for the purchased good or service. |
| Replacement Service Authorizations | * When no approvals were required for original SA, no approvals are required for replacement SA.
* If approvals for original SA were required, the same approvals must be in place and linked to the replacement service record before issuing the replacement SA.
 | D.3 | Must document the issuance of the replacement SA in case notes in addition to the relevant RHW Purchasing Approval Workflow when required for the purchased good or service. |
| The following services and goods, when provided as part of the trial work plan:* Residential modifications
* Worksite modifications
* Durable medical good
* Orthotics and prosthetics
* Any services related to self-employment
* Modification of vehicles
* Academic or vocational training
* Medical services specified in VRSM C-700 Medical Services
* Services or goods to support any of these items
 | VR Supervisor approval | B.6 | VR Supervisor Approval |
| Exceptions to required customer participation in the cost of services (BLR). | VR Manager approval  | C.2.3 | N/A |
| Exceptions to required use of readily available comparable benefits  | VR Manager approval | C.2.2 | N/A |
| Use of a noncertified interpreter  | Written approval from customer  | C.17 | N/A |
| Paying any legal fees for self-employment | Consultation with TWC Office of General Counsel | C.9.1 | Consultation Only |
| VR staff reporting the theft of tools or equipment as stolen when the customer refuses to return items that are no longer being used to support VR outcomes | Notify TWC Risk and Security Management through Incident Reporting Process | C.16.5 |  N/A |
| Abuse, neglect, and exploitation of a customer\* *\*You must take immediate action to report to appropriate investigating agency or law enforcement.* | Notify VR Manager and VR Supervisor | A.8  | N/A |

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| **Date** | **Type** | **Change Description** |
| 09/03/2024 | New | VRSM Policy and Procedure Rewrite |
| 04/01/2025 | Revised  | ReHabWorks and SARA Support intranet page was added as a resource |
| 07/18/2025 | Revised | Updated ATF Backdated SA to After-the-Fact SA  |
| 10/20/2025 | Revised | Revised approval level for ATF SAs to Deputy Director of Field Services Delivery, or designee. |