# Part E Chapter 8: Case Note Requirements

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| **Policy Number** | **Authority** | **Scope**  | **Effective Date** |
| Part E, Chapter 8 | N/A | All TWC-VR staff | 07/01/2025 |

## Case Note Requirements

| **Case Note Topic** | **Staff Use**  | **Documentation** | **VRSM Ref.** |
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| Service Justification | VR counselor use only | A case note that describes:* type of service,
* goal of service,
* specific provider,
* begin and end dates of service,
* justification for services (including documentation of best value for purchased goods and services),
* information about available comparable benefits, and
* information about how the customer exercised informed choice.

TWC-VR goods or services may be authorized with a service justification before the service is included in the IPE and the IPE is signed by both the customer and the VR Counselor only if—* The good or service is necessary for the customer to participate in assessments that are required to determine eligibility or develop the IPE;
* Participation in the assessment cannot occur without the provision of the good or service; and
* Comparable benefits for the good or service are not readily available.

When services are provided for family members, the service justification note must also describe:* why services are needed for a family member;
* which family member or members need the services (name and Social Security number);
* what services are needed; and
* how the services are expected to contribute to the customer's employment.

**TIP: An additional service justification is not required if comparable information has already been recorded in another case note or in the customer’s IPE.** **TIP**: **A service justification is only allowable for potentially eligible customers and before a customer is placed in trial work or active services. After a customer has signed their Trial Work Plan (TWP) or IPE, any additional goods or services must be placed on the TWP or IPE amendment.** | various |

# Review

The Policy Planning and Statewide Initiatives Team, or designee, is responsible for reviewing this policy and these procedures and will update the Document History log if necessary.

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| **Date** | **Type** | **Change Description** |
| 09/03/2024 | New | VRSM Policy and Procedure Rewrite |
| 11/01/2024 | Revised | Added clarification that service justifications are not allowable in trial work experience services. |
| 02/10/2025 | Revised | Changed ‘level of significance’ to significance of disability to align with federal regulations wording. Added ‘tip’ to service justification for case notes. |
| 07/01/2025 | Revised | Added clarification of when a service justification can be utilized. |