# 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 | 07/18/2025 |

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## Case Note Requirements

| **Case Note Topic** | **Staff Use** | **Documentation** | **VRSM Ref.** |
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| After-the-fact SA (Service Authorization) | Any VR staff | A case note entered by VR staff member that is requesting, approving, or denying a request to issue an ATF SA.  Request  The “Add to Topic” for a request includes the specific good or service and the purpose of the case note, such as “Training ATF SA Request” or “Medical Services ATF 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 Denial  The “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 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.3 |
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# 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. |
| 07/18/2025 | Revised | Updated ATF Backdated SA to After-the-Fact SA and removed Replacement SA as this is no longer a case note topic in RHW. |