# Vocational Rehabilitation Services Manual Section B-400

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## Notes on the Manual

On October 1, 2017, Texas Workforce Commission’s Blind Services Division and Rehabilitation Services Division combined to create a single designated state unit (DSU) to administer the vocational rehabilitation program for Texans with disabilities.

The combined Vocational Rehabilitation Services Manual (VRSM) was initially published on October 1, 2017. The latest update to this manual is reflected in the chapters below.

Please note that VRSM includes links to information that is intended to provide additional decision-making supports to VR staff. Some of this information may not be available to individuals who are accessing the VRSM outside of TWC's firewall. Copies of materials that cannot be accessed directly through links can be made available upon request.

Substantive revisions to the content are noted in the VRSM List of Revisions. Any printed versions may not contain the latest policy changes.

If you have any questions about VRSM content, please contact the TWC Vocational Rehabilitation Division Policy Team at state office by sending an email message to vrsm.support@twc.texas.gov.

## Manual Overview

The VR Services Manual:

* helps ensure VR customers receive quality services to assist them in achieving successful competitive integrated employment outcomes as a result of their participation in vocational rehabilitation services.;
* helps to ensure taxpayer funds are spent wisely and each purchase paid for with public funds represents full value to the taxpayer; and
* provides published policies and procedures for maintaining compliance with federal and state laws, statutes, and rules or regulations.

The latest update to this manual is reflected in the chapters below. Any printed versions may not contain the latest policy changes.

# Vocational Rehabilitation Services Manual B-400: Completing the Comprehensive Assessment

## Introduction

The purpose of the comprehensive assessment is to determine the employment outcome and the nature and scope of Vocational Rehabilitation (VR) services to be included in the individualized plan for employment (IPE). A comprehensive assessment of the rehabilitation needs of each eligible individual includes an evaluation of the individual's unique strengths, resources, priorities, concerns, abilities, capabilities, interests, and informed choice—including the need for supported employment.

The VR counselor uses existing information and records to complete the comprehensive assessment, whenever possible. If additional assessments or records are necessary for completing the comprehensive assessment, the VR counselor makes the eligibility determination in accordance with the policies and procedures in VRSM B-300: Determining Eligibility and then proceeds with assessments needed to complete the comprehensive assessment.

## B-401: Legal Authorization

**34 CFR §361.5(c)(5)**

"Assessment for determining eligibility and vocational rehabilitation needs means, as appropriate in each case—

(i)(A) A review of existing data—

(1) To determine if an individual is eligible for vocational rehabilitation services; and

(2) To assign priority for an order of selection described in §361.36 in the States that use an order of selection; and

(B) To the extent necessary, the provision of appropriate assessment activities to obtain necessary additional data to make the eligibility determination and assignment;

(ii) To the extent additional data are necessary to make a determination of the employment outcomes and the nature and scope of vocational rehabilitation services to be included in the individualized plan for employment of an eligible individual, a comprehensive assessment to determine the unique strengths, resources, priorities, concerns, abilities, capabilities, interests, and informed choice, including the need for supported employment, of the eligible individual. This comprehensive assessment—

(A) Is limited to information that is necessary to identify the rehabilitation needs of the individual and to develop the individualized plan for employment of the eligible individual;

(B) Uses as a primary source of information, to the maximum extent possible and appropriate and in accordance with confidentiality requirements—

(1) Existing information obtained for the purposes of determining the eligibility of the individual and assigning priority for an order of selection described in §361.36 for the individual; and

(2) Information that can be provided by the individual and, if appropriate, by the family of the individual;

(C) May include, to the degree needed to make such a determination, an assessment of the personality, interests, interpersonal skills, intelligence and related functional capacities, educational achievements, work experience, vocational aptitudes, personal and social adjustments, and employment opportunities of the individual and the medical, psychiatric, psychological, and other pertinent vocational, educational, cultural, social, recreational, and environmental factors that affect the employment and rehabilitation needs of the individual;

(D) May include, to the degree needed, an appraisal of the patterns of work behavior of the individual and services needed for the individual to acquire occupational skills and to develop work attitudes, work habits, work tolerance, and social and behavior patterns necessary for successful job performance, including the use of work in real job situations to assess and develop the capacities of the individual to perform adequately in a work environment; and

(E) To the maximum extent possible, relies on information obtained from experiences in integrated employment settings in the community and in other integrated community settings;

(iii) Referral, for the provision of rehabilitation technology services to the individual, to assess and develop the capacities of the individual to perform in a work environment; and

(iv) An exploration of the individual's abilities, capabilities, and capacity to perform in work situations, which must be assessed periodically during trial work experiences, including experiences in which the individual is provided appropriate supports and training."

**34 CFR §361.45**

"(f) Data for preparing the individualized plan for employment.

(1) Preparation without comprehensive assessment. To the extent possible, the employment outcome and the nature and scope of rehabilitation services to be included in the individual's individualized plan for employment must be determined based on the data used for the assessment of eligibility and priority for services under §361.42.

(2) Preparation based on comprehensive assessment.

(i) If additional data are necessary to determine the employment outcome and the nature and scope of services to be included in the individualized plan for employment of an eligible individual, the State unit must conduct a comprehensive assessment of the unique strengths, resources, priorities, concerns, abilities, capabilities, interests, and informed choice, including the need for supported employment services, of the eligible individual, in the most integrated setting possible, consistent with the informed choice of the individual in accordance with the provisions of §361.5(c)(5)(ii).

(ii) In preparing the comprehensive assessment, the State unit must use, to the maximum extent possible and appropriate and in accordance with confidentiality requirements, existing information that is current as of the date of the development of the individualized plan for employment, including information—

(A) Available from other programs and providers, particularly information used by education officials and the Social Security Administration;

(B) Provided by the individual and the individual's family; and

(C) Obtained under the assessment for determining the individual's eligibility and vocational rehabilitation needs."

## B-402: Gathering Information for the Comprehensive Assessment

Completing the comprehensive assessment involves reviewing information about the customer to develop a written plan that outlines the services, goals, and objectives that are later included in the customer's IPE.

The comprehensive assessment process begins when the customer applies for services, and it continues until the IPE is developed and signed.

The process includes a review of the customer's personality, interests, interpersonal skills, intelligence and related functional capacities, educational achievements, work experience, vocational aptitudes, personal and social adjustments, and employment opportunities; the individual's medical, psychiatric, and psychological history; and other pertinent vocational, educational, cultural, social, recreational, and environmental factors that affect the individual's employment and rehabilitation needs.

### B-402-1: Comprehensive Assessment Case Notes

Throughout the comprehensive assessment process, the specific details that are gathered and evaluated by the VR counselor can be entered as "Assessment and Planning" case notes.

When all the assessment information has been gathered and reviewed, the VR counselor enters a case note with the title "Comprehensive Assessment" in ReHabWorks (RHW). The comprehensive assessment case note can be amended as additional information is obtained throughout the life of the case.

The comprehensive assessment case note must include the following:

* Summary of the customer's disabilities and related impediments to employment
* Summary of the customer's adjustment to the disability
* Services recommended that will address specific functional limitations
* Assessment of the customer's needs for rehabilitation technology
* Justification for a selected employment goal
* Justification for services needed to achieve the employment goal (include justification for each service and documentation of best value for purchased goods and services)
* Available resources and comparable benefits
* Independent living skills that support the employment goal
* Any relevant legal issues
* Description of the customer's involvement in and informed choice regarding the selection of services and providers and the customer's employment goal
* Educational and vocational history and goals
* Justification for planned frequency of contact
* Explanation of the customer's contribution to planned services (if required)
* Any other factors that might impact the customer's participation in services

If a required topic is not assessed, document the reason in the case note for the comprehensive assessment.

When relevant, the case note may also include information about:

* a customer's work tolerance;
* a customer's ability to acquire specific job skills;
* a customer's patterns of work behavior;
* the additional medical or psychological evaluations needed to determine the nature and scope of services;
* the vocational and psychological assessment completed by the VR specialist;
* functional assessments conducted in a trial work setting; and
* any additional assessments needed to determine:
	+ the best job placement; or
	+ the support services to be provided through supported employment services.

See VRSM E-300: Case Notes Requirements for additional information about required RHW case notes.

### B-402-2: Use of Existing Records

To the maximum extent possible, the VR counselor must:

* use existing records;
* rely on information from the individual's experiences in an integrated employment setting or in other integrated community settings; and
* consider the validity or correctness of the information based upon the source and the VR counselor's knowledge of the customer.

Customers must not be required to participate in unnecessary assessments, such as a psychological assessment or medical assessment, if:

* comparable information is available from records and is sufficient; or
* the assessment will not directly assist with determining:
	+ the IPE goal; or
	+ the VR services available to the customer.

#### Requesting Records or Assessments

If additional records and/or assessments are needed to complete the comprehensive assessment, they should be requested as soon as the need has been identified.

### B-402-3: Updating ReHabWorks (RHW)

During the process of evaluating the customer's information, additional information might be found that affects the customer's disability classification or level of significance. When this occurs, the VR counselor updates the classification and level of significance in RHW.

For additional information, see VRSM B-300: Determining Eligibility Level of Significance, and the ReHabWorks User's Guide (RUG), located on the TWC intranet.

## B-403: Assessments for the Comprehensive Assessment

Information, including additional assessments, used to determine eligibility for VR services can also be used for completing the comprehensive assessment. For more information, see VRSM B-308: Assessments.

However, to the greatest extent possible, the comprehensive assessment should be based on the customer's experiences in competitive integrated employment and in other integrated community settings.

The comprehensive assessment is intended to:

* clarify the customer's vocational interests and aptitudes;
* assess the marketability of the customer's present and potential skill levels;
* describe the types of services needed to improve the customer's skills;
* identify the best use of rehabilitation technology; and
* identify other needs and issues that are relevant to VR services.

The VR counselor ensures that assessments are provided in the most individualized and most integrated setting possible that is consistent with the customer's informed choice.

Examples of assessments that may be necessary to gather information to complete the comprehensive assessment may include:

* psychological or neuropsychological evaluations;
* vocational evaluations;
* functional capacity evaluations;
* low-vision evaluations;
* assistive technology evaluations; or
* situational assessments.

See VRSM D-202: VR Staff Responsibilities to determine whom to contact for help interpreting assessments or for recommendations on additional assessments.

### B-403-1: Required Assessments

In some cases, the VR counselor must obtain required documentation before planning services, to ensure that the proper VR services are offered.

#### Post-secondary Training

When considering vocational or academic training, the VR counselor ensures that the case file includes documentation that demonstrates the customer's ability to successfully complete the training. Examples of documentation include, but are not limited to transcripts or academic assessments. See VRSM C-400: Training Services for more information.

#### Medical Services

When considering medical services such as surgeries, therapies, or post-acute brain injury services, see VRSM C-700: Medical Services. All required approvals and consultations must be completed prior to including a service on the customer's IPE.

#### Other VR Services

In each instance, the VR counselor reviews the relevant chapter in the Vocational Rehabilitation Services Manual (VRSM) on each service to ensure that the required assessment is completed for planning the service.

### B-403-2: Specialized Assessment and Evaluations

When completing the comprehensive assessment, it may be necessary to obtain condition-specific or service-specific assessments.  Refer to the following VRSM and VR-SFP chapters for additional information on the following:

* Assistive Technology Unit Evaluation (see VRSM C-202: Assistive Technology Unit Services)
* Environmental Work Assessment (see VR-SFP Chapter 4: Employment Assessments, 4.5 Environmental Work Assessment)
* Career Planning Assessment (see VR-SFP Chapter 4: Employment Assessments, 4.6 Career Planning Assessment)
* Intensive Work Preparation and Life Skills Training Program Assessment (see VRSM C-900: Intensive Work Preparation and Life Skills Training)

### B-403-3: Comprehensive Vocational Evaluation System

The Comprehensive Vocational Evaluation System (CVES) is the only test battery designed and standardized for a person who is blind or has significant visual impairment. The CVES is a neuropsychological, psychological, or vocational assessment depending on the qualifications of the person administering and interpreting it.

For a customer with a significant visual impairment, the VR counselor must only purchase comprehensive psychological and vocational evaluations from a psychologist certified to administer the CVES. For a more limited assessment, such as to evaluate only for emotional functioning without intellectual or vocational measurement, CVES certification is not required.

To verify an evaluator's certification to administer comprehensive psychological or vocational evaluation to a customer with significant visual impairment, contact the TWC Vocational Diagnostic Unit (VDU) by emailing vr.vdu@twc.texas.gov.

## B-404: Potential Employment Goals

When identifying potential employment goals to include on the IPE, the VR counselor and the customer consider the customer's:

* unique strengths;
* resources;
* priorities;
* concerns;
* abilities;
* capabilities; and
* interests.

Additional consideration should be given to:

* potential job opportunities in the local market, or the customer's willingness and ability to relocate;
* rehabilitation services and supports available to address the identified impediments to employment; and
* other available resources to address the customer's vocational concerns.

The employment goal may be:

* full time
* part-time employment,
* supported employment, or
* self-employment,
* telecommuting,
* business ownership, or
* any other type of employment in a competitive integrated setting.

The employment goal identified on the customer's IPE must be clearly supported by the information in the comprehensive assessment and consistent with the customer's informed choice.

### Labor Market and Career Information

When appropriate, the VR counselor and the customer can also explore the labor market information as it relates to the customer's employment goal. This information is available through the [Texas Workforce Commission's Labor Market and Career Information (LMCI)](http://www.lmci.state.tx.us/explore/TSC/YBF.asp) website.

### Documentation

Document the employment goals that were considered and the decision-making process that was used to select the goal that is included on the customer's IPE as part of the Comprehensive Assessment case note. For more information on case note requirements, refer to VRSM E-300: Case Notes Requirements.

### B-404-1: Customers Who Have a Work History

When a customer has a history of employment, the VR counselor and the customer consider the customer's:

* job experience;
* transferable skills; and
* ability to work with accommodations.

#### Informed Choice

When a customer has a work history, the customer is offered the opportunity to make an informed decision about whether to return to the same occupation and or return to work with the same employer. The customer may also choose to pursue a different type of career as long as the employment goal is supported by the information gathered during the comprehensive assessment.

#### Return to Work with Same Employer

If the customer wants to return to work with the same employer but is unable to return to the same position, explore whether the employer provides training that would enable the customer to return to a different position.

If training, such as on-the-job training, is provided by the employer, to assist the customer with returning to work with the same employer, but in a different position, VR funds cannot be used to pay for this training.

If training, such as career development courses are needed pursue a new position with the same employer, but these courses are not available directly from the employer, training can be purchased through providers other than the employer with VR funds.

#### Return to Work with Different Employer

If the customer chooses to work for another employer in the same job or in a different job, counseling and guidance can help the customer determine how his or her skills and work history can transfer to a different job.

As needed, the VR counselor discusses the job requirements and conditions, training, work environment and duties, local demand for workers, and possibility of relocating to find employment when considering any employment goal.

### B-404-2: Customers with No Work History

When a customer has no work history, the VR counselor and the customer consider the customer's:

* needs;
* abilities;
* interests;
* strengths;
* preferences; and
* other resources.

If the customer doesn't know what type of job he or she wants to pursue, the VR counselor identifies possible types of employment by considering:

* volunteer experiences;
* unpaid work for family and friends;
* hobbies; and
* informal training or education.

#### Informed Choice

The employment goal that is included on the customer's IPE must be supported by the information gathered during the comprehensive assessment.

### B-404-3: Other Factors That May Impact the Choice of an Employment Goal

The customer's life circumstances and personal history can significantly impact the choice of an employment goal.

#### Criminal History

If the customer reports a criminal history, the VR counselor explains that he or she may be barred from certain jobs requiring a license or other credential. If the customer wants to pursue employment requiring a license or credential, the VR counselor obtains a criminal background check before committing to services on an IPE.

When the customer selects an employment goal that requires a specific license or credential, the VR counselor must check for information about which criminal convictions may prevent the customer from obtaining a specific license.

The following websites are resources for this information:

* [Texas Department of Licensing and Regulation (TDLR)](https://www.tdlr.texas.gov/)[;](https://www.dshs.texas.gov/)
* [Texas Department of State Health Services (TDSHS) licensing and regulations](https://www.dshs.texas.gov/); or
* other relevant credentialing boards.

Refer to VRSM B-405: Computerized Criminal History Checks (below) for more information.

## B-405: Computerized Criminal History Checks

VR has authority to obtain a Computerized Criminal History check (CCH) on customers from the Texas Department of Public Safety (DPS) (Texas Government Code, §411.117) for the purpose of employment planning. See VRSM A-207: Confidentiality and Use of Customer Records and Information for more information.

### B-405-1: Obtaining and Maintaining Computerized Criminal History Check Results

Occupations requiring a license, permit, or other credential may include a CCH as part of the credentialing process.

If a customer wants to work in an occupation or participate in a training program requiring a license, permit, or other type of credentialing, the VRC should explain to the customer why the CCH is necessary and document in a case note the reasons for obtaining the CCH, along with a summary of the discussion with the customer.

Requests for the CCH can be submitted only on cases determined eligible or that are in active status.

#### When to Request a CCH

Request a CCH using the VR1510, Request for Customer Computerized Criminal History (CCH) Search, after an eligibility determination has been made, when:

* At the customer's request, if a customer has reported to the counselor difficulty in obtaining employment due to a history of felony conviction or
* Prior to signing an Individualized Plan for Employment (IPE), if a customer wants to work in an occupation that requires a license or other credential and he or she does not hold a valid license or credential in that occupation
	+ Provide the customer with information about the impact of certain criminal offenses on whether the person will be eligible to obtain the required credentials to engage in specific employment outcomes.
	+ If a customer's CCH shows a criminal history and the occupational goal is licensed by the Texas Department of Licensing and Regulation (TDLR), you must request a criminal history evaluation to determine whether the customer's criminal history will prevent him or her from being licensed in that occupation. (See the [TDLR Criminal History Evaluation Letter page](http://www.tdlr.texas.gov/crimHistoryEval.htm) for more information.)
	+ For occupations not licensed by TDLR, contact the appropriate licensing entity to determine if it is feasible for the customer to be licensed.
	+ Do NOT select as a vocational goal any occupation for which TDLR or any other licensing entity has determined that the customer may not be licensed.

The CCH can be used in planning for the possible use of Employment Service Criminal Background Premium.

#### Making the Name-Based CCH Request

Complete the VR1510, Request for Customer Computerized Criminal History (CCH) Search, and email it to the regional point of contact with the following subject line (to ensure encryption): "<ENCRYPT> Background Check Request". To find the list of regional points of contact for CCH, see POCs for Computerized Criminal History Reports.

Refer to VRSM A-208-2: Release of Customer Criminal History Records for policy and procedure regarding the release of a CCH.

### B-405-2: Referrals to the Criss Cole Rehabilitation Center

Once a VR counselor refers a customer to the Criss Cole Rehabilitation Center (CCRC), the designated CCRC admissions staff member will run the CCH report. For more information, refer to VRSM C-500: Criss Cole Rehabilitation Center.

### B-405-3: When Fingerprinting Is Needed

If a name-based CCH search reveals any result, to clear any possible misidentification, the VR counselor contacts the state office points of contact to obtain a fingerprint-based CCH search at VR's expense. Alternatively, the customer may go to the Texas Department of Public Safety independently to obtain a fingerprint-based CCH; however, VR will not pay for this cost.

If a customer reports to be from another state in the United States, a fingerprint-based CCH is recommended.

For additional information on making a fingerprint-based CCH, refer to VRSM D-510-6: Fingerprint Procedures.

### B-405-4: Evaluating and Documenting Computerized Criminal History Results

#### CCH Documentation

To document a CCH in ReHabWorks (RHW), the VR counselor does the following:

1. Enters a case note explaining what counseling and guidance was offered to the customer about selecting his or her vocational goal and obtaining a CCH before the customer and the VR counselor agree to the content of the IPE.
2. Enters a case note confirming that a CCH was requested using the procedure indicated and why it was requested. Any RHW case note topic may be used, but "CCH Request" must be included in the Add to Topic section of the case note.
3. After the CCH results are received, the VR counselor is only allowed to discuss the implications of the fingerprint-based CCH search results with the customer. If a name-based CCH search reveals any result, to clear any possible misidentification, the VR counselor contacts the state office point of contacts to obtain a fingerprint-based CCH search.
4. Documents how the implications of the CCH affect the selection of the vocational goal. Do not cut and paste or otherwise include the specific details obtained from the CCS, for example, the dates and types of convictions, in the case note.

The VR counselor must use the following process to handle and destroy CCH results:

1. The CCH results must be purged and destroyed (for example, deleting from email and then deleting from the Deleted folder in the email application, such as Outlook) immediately after the criminal history record has served the immediate purpose for which it was obtained. For example, after the VR counselor discusses the implication of the fingerprint-based CCH results with the customer, the VR counselor immediately destroys the CCH results.
2. VR may release the fingerprint-based CCH results to the customer or customer’s representative if there is a valid release or written request prior to the destruction of the fingerprint CCH results by the VR counselor.
3. The name-based CCH results are not to be printed for any reason.
4. The CCH results are not to be stored in a paper case file or the customer’s virtual case file under any circumstances.

CCH reports are often incomplete and difficult to interpret. For assistance, refer to the guidance document on interpreting CCHs or consult the regional office CCH representative, the VR supervisor, the state office points of contact, or TWC's Office of General Counsel (OCG).

After the VR counselor obtains OGC's interpretation of the CCH report and determines that a customer's criminal history would preclude the customer from obtaining a license through the Texas Department of Licensing and Regulation (TDLR), the VR counselor must notify the customer of the determination. The customer may request a criminal history evaluation directly from TDLR.  For instructions on how to submit a request to TDLR, refer to the [TDLR Criminal History Evaluation Letter](https://www.tdlr.texas.gov/crimHistoryEval.htm).

For occupations not licensed by TDLR, the VR counselor contacts the appropriate licensing entity to obtain an opinion about licensing as it relates to criminal history. The VR counselor must not support or include a vocational goal on an IPE for any occupation for which TDLR or another licensing agent has determined that the customer may not be licensed. The VR counselor documents the result of the customer's inquiry to TDLR or other licensing entity.

#### Releasing the CCH Results

For additional information on releasing CCH results, refer to VRSM A-208-2: Release of Customer Criminal History Records.

## B-406: Authorizing Goods or Services Before an IPE

VR goods or services may be authorized before the service is included on 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 develop the IPE; and
* the assessment cannot be modified or accommodated without the provision of the good or service; and
* comparable benefits for the good or service are not readily available.

Goods or services purchased with VR funds prior to completing the IPE must be authorized in advance with a service authorization and must follow the processes and procedures outlined in VRSM D-204: The Purchasing Process.

## B-407: Sharing Information with the Customer

Explaining and/or sharing information about a comprehensive assessment with a customer is a valuable counseling and guidance service (see VRSM C-100: Counseling and Guidance) that can help the customer better understand:

* the disability and its impact on employment;
* strategies to overcome the impediments created by the disability; and
* how to select an employment goal that that will increase the opportunity for a successful outcome.

The VR counselor does not share information that might be harmful to the customer directly with the customer. If, based on their professional judgment, the VR counselor believes that sharing certain information will be harmful to the customer, the VR counselor coordinates an appointment between the customer and the physician or psychologist who provided the report that contains the information that is believed to be harmful; the physician or psychologist will decide whether or not to disclose the information during that appointment.

The VR counselor discloses medical and psychological records to the customer (and/or representative) only as allowed under the guidelines on release and confidentiality of customer records in VRSM D-305: Confidentiality and Use of Customer Records and Information.

## B-408: Vocational Diagnostic Unit

The Vocational Diagnostic Unit (VDU) conducts comprehensive vocational and psychological evaluations to assess VR customers who have a primary disability of visual impairment.

The VDU helps the VR counselor determine how VR services can benefit a customer by assessing the customer's:

* verbal and/or cognitive skills;
* sensory and/or motor skills;
* independent living skills;
* academic skills;
* social skills; and
* vocational skills and interests.

### B-408-1: Assessment Methods

A skills assessment may be conducted using:

* standardized instruments such as:
	+ cognitive tests;
	+ sensory tests;
	+ neuromuscular tests;
	+ adaptive behavior tests;
	+ academic achievement tests;
	+ personality tests; and
	+ vocational interest tests;
* observations;
* case folder review;
* clinical interviews; and
* interviews with the customer's teachers, counselors, and family members.

### B-408-2: Determining the Need for Vocational Diagnostic Unit Services

VDU services are used when a VR counselor needs additional assessments, diagnostics, and or recommendations throughout the rehabilitation process to:

* determine a customer's level of vocational potential;
* identify specialty services that will support VR outcomes;
* evaluate potential vocational goals or job placements;
* to identify specific training or programs at CCRC to help the customer achieve independent living and vocational goals (see VRSM C-500: Criss Cole Rehabilitation Center);
* evaluate potential post-secondary training options; and
* regarding the customer's progress when he or she shows significant changes in condition and/or functioning since initial evaluation.

### B-408-3: Referral Procedure

Only the VR counselor can refer a customer to VDU. The VR counselor can request that VDU conduct a psychological evaluation or a vocational assessment separately or they may request both assessments at the same time.

To refer a customer to the VDU, the VR counselor:

1. Contacts the VDU to discuss the customer's needs.
2. Creates a service record in RehabWorks (RHW).
3. Delegates the RHW service record to the VDU vocational diagnostician.
4. Coordinates the assessment with the VDU diagnostician.
5. Notifies the customer of the assessment date, time, and any other pertinent details.

For more information, see ReHabWorks User's Guide (RUG) E-200: Case Service Records: E-203-8-12: Creating, Updating, and Canceling Line Items for In-House Services, located on the TWC SharePoint.

### B-408-4: Planning for Evaluation

If the evaluation will be done in a field office the VR counselor must make prior arrangements for:

* a quiet, private room;
* a table and two chairs;
* scheduling (allow six to eight hours per evaluation); and
* customer transportation (if needed).

### B-408-5: Evaluation Outcome

A VDU staff member:

* enters a summary and recommendations of the VDU evaluation in a case note in RHW.
* sends a comprehensive evaluation report to the referring VR counselor.

A VDU diagnostician:

* may recommend additional psychological evaluation or psychological services in the evaluation report.
* will not arrange or coordinate additional psychological evaluation or services for the customer.

Note: A VDU diagnostician's recommendation is only a recommendation, not a mandate.

### B-408-6: In-house Psychological Services

The VDU vocational diagnostician must:

* be licensed by the Texas State Board of Examiners of Psychologists as a licensed psychologist, provisionally licensed psychologist, licensed psychological associate, or licensed specialist in school psychology; or
* be licensed by the Texas State Board of Professional Counselors as a licensed professional counselor.

The vocational diagnostician may conduct the psychological evaluation in conjunction with other vocational assessments, especially for customers who are unable to obtain these types of services in their home communities.

For information on the Comprehensive Vocational Evaluation System (CVES), refer to VRSM B-403-3: Comprehensive Vocational Evaluation System (CVES).

### B-408-7: VR Counselor Responsibilities

The VR counselor:

* reviews the VDU report; and
* discusses the recommendations with the customer.

The VR counselor incorporates the recommendations from the VDU reports into the customer's IPE, if the customer agrees to follow them.

To request consultation and report interpretation with VDU, the VR counselor can contact the vocational diagnostician assigned to the region.