# **Vocational Rehabilitation Services Manual B-200: Processing Initial Contacts and Applications**

Revised February 22, 2022

## **B-206: Opening a Case**

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**B-206-5: Adjusting the Phase of a Previously Closed Case**

A phase adjustment is a RHW process that changes a closed case.

Phase adjustments must be used only when the:

* case closed before case assignment;
* case closed either successfully or unsuccessfully after IPE; or
* case closed before application (potentially eligible cases only); and
* date the case was phase adjusted is within the current program year.

Note: If the phase adjustment request is outside of the program year, approval by the Deputy Division Director for Field Services is required.

**Closure before Case Assignment Is Returned to Initial Contact without Case Assignment**

To request and complete a phase adjustment from a closed status before Case Assignment back to an Initial Contact without Case Assignment, follow the procedure below.

The VR counselor does the following:

1. Reviews the case and gathers information from the customer to ensure that a phase adjustment is appropriate
2. Selects the Phase Adjustment Request tab from the case in RHW
3. Selects the Save tab to set the approval status to pending and to generate an action for the VR Supervisor in RHW
4. Documents the justification for the phase adjustment in a case note that will automatically open in RHW when the phase adjustment request is saved

The VR Supervisor does the following:

1. Reviews and approves or denies the phase adjustment request in RHW by selecting the Phase Adjustment Approval tab from the case in RHW
2. Documents the approval or non-approval of the decision for the phase adjustment in a case note in RHW
3. Notifies the VR counselor that the phase adjustment was approved or denied

Note: This is only available if the adjustment is within the program year quarter. If outside the quarter, but within the program year, email VR RHW Support to phase adjust the case with VR Supervisor approval. If the phase adjustment request is outside of the program year, approval by the Deputy Division Director for Field Services is required.

**Closure after IPE Is Returned to Active Status**

To request and complete a phase adjustment from a closed status after IPE back to an active status, follow the procedure below.

The VR counselor does the following:

1. Reviews the case and gathers information from the customer to ensure that a phase adjustment is appropriate
2. Selects the Phase Adjustment Request tab from the case in RHW
3. Selects the Save tab to set the approval status to pending and to generate an action for the VR Supervisor in RHW
4. Documents the justification for the phase adjustment in a case note that will automatically open in RHW when the phase adjustment request is saved

The VR Supervisor does the following:

1. Reviews and approves or denies the phase adjustment request in RHW by selecting the Phase Adjustment Approval tab from the case in RHW
2. Documents the approval or non-approval of the decision for the phase adjustment in a case note in RHW
3. Notifies the VR counselor that the phase adjustment was approved or denied

Note: This is only available if the adjustment is within the program year quarter. If outside the quarter, but within the program year, email VR RHW Support to phase adjust the case with VR Supervisor approval. If the phase adjustment request is outside of the program year, approval by the Deputy Division Director for Field Services is required.

**Unsuccessful Closure Changed to a Successful Closure after IPE**

If a customer whose case was closed as an unsuccessful closure became employed during the same program year in which the case was closed, the VR counselor must first complete the phase adjustment process outlined above.

To change an unsuccessful closure after IPE to a successful closure, follow the procedure below.

The VR counselor does the following:

1. Reviews the case to ensure that all criteria for Successful Closure are met (see [B-600: Closure and Post-Employment Services](https://twc.texas.gov/vr-services-manual/vrsm-b-600))
2. Updates the employment information in RHW (see [B-600: Closure and Post-Employment Services](https://twc.texas.gov/vr-services-manual/vrsm-b-600))
3. Selects the Phase Adjustment Request tab from the case in RHW
4. Selects the Save tab to set the approval status to pending and to generate an action for the VR Supervisor in RHW
5. Documents the justification for the phase adjustment in a case note that will automatically open in RHW when the phase adjustment request is saved

The VR Supervisor does the following:

1. Reviews and approves or denies the phase adjustment request in RHW by selecting the Phase Adjustment Approval tab from the case in RHW
2. Documents the approval or non-approval of the decision for the phase adjustment in a case note in RHW
3. Notifies the VR counselor that the phase adjustment was approved or denied

Note: This is only available if the adjustment is within the program year quarter. If outside the quarter, but within the program year, email VR RHW Support to phase adjust the case with VR Supervisor approval. If the phase adjustment request is outside of the program year, approval by the Deputy Division Director for Field Services is required.

If the phase adjustment is approved, the VR counselor closes the case as a successful closure in RHW.

**Successful Closure Changed to Unsuccessful Closure after IPE**

If a case was closed as a successful closure but did not meet the criteria for a successful closure, the VR counselor must first complete the phase adjustment process above.

To change a successful closure after IPE to an unsuccessful closure, follow the procedure below.

The VR counselor does the following:

1. Reviews the case to ensure that all criteria for Unsuccessful Closure are met (see [B-600: Closure and Post-Employment Services](https://twc.texas.gov/vr-services-manual/vrsm-b-600))
2. Selects the Phase Adjustment Request tab from the case in RHW
3. Selects the Save tab to set the approval status to pending and to generate an action for the VR Supervisor in RHW
4. Documents the justification for the phase adjustment in a case note that will automatically open in RHW when the phase adjustment request is saved

The VR Supervisor reviews and approves or denies the phase adjustment request in RHW by selecting the Phase Adjustment Approval tab from the case in RHW.

Note: This is only available if the adjustment is within the program year quarter. If outside the quarter, but within the program year, email VR RHW Support to phase adjust the case with VR Supervisor approval. If the phase adjustment request is outside of the program year, approval by the Deputy Division Director for Field Services is required.

If the change is approved, the VR counselor closes the case as an unsuccessful closure in RHW.

**Closure Before Application Is Returned to Initial Contact with Case Assignment (Potentially Eligible Cases Only)**

To request and complete a phase adjustment from a closed status before after Application back to an Initial Contact with Case Assignment for potentially eligible cases, follow the procedure below.

The VR counselor does the following:

1. Reviews the case and gathers information from the customer to ensure that a phase adjustment is appropriate
2. Selects the Phase Adjustment Request tab from the case in RHW
3. Selects the Save tab to set the approval status to pending and to generate an action for the VR Supervisor in RHW
4. Documents the justification for the phase adjustment in a case note that will automatically open in RHW when the phase adjustment request is saved

The VR Supervisor does the following:

1. Reviews and approves or denies the phase adjustment request in RHW by selecting the Phase Adjustment Approval tab from the case in RHW
2. Documents the approval or non-approval of the decision for the phase adjustment in a case note in RHW
3. Notifies the VR counselor that the phase adjustment was approved or denied

Note: This is only available if the adjustment is within the program year quarter. If outside the quarter, but within the program year, email VR RHW Support to phase adjust the case with VR Supervisor approval. If the phase adjustment request is outside of the program year, approval by the Deputy Division Director for Field Services is required.

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