# Vocational Rehabilitation Services Manual B-500: Individualized Plan for Employment

Revised on October 1, 2021

## B-505: Joint Annual Review and IPE Amendments

The IPE is reviewed at least annually by the VR counselor and the customer or, as appropriate, the customer's representative to assess the customer's progress in achieving the identified employment goal. The review of the IPE can be completed as a formal joint annual review (JAR) or when the IPE is amended.

Completing either a joint annual review or an IPE amendment resets the clock for the next annual review. The new date for completing the next JAR is one year from the date of the most recent JAR or IPE Amendment.

### B-505-1: Joint Annual Review

When completing a JAR, the VR counselor meets with the customer and, as appropriate, the customer's representative to

* review the details in the current IPE or IPE amendment;
* determine if there is a need to complete an IPE amendment;
* review and update all information captured in RHW under the following menus:
  + Initial Contact,
  + Application,
  + Education History, and
  + Plan;
* review and update release forms; and
* document the joint annual review (JAR) in a case note.

#### JAR Documentation

The JAR case note must include a specific review of all required elements of the IPE, including a review of the progress made toward reaching the employment goal. This includes a review of the

* Employment goal
* Educational goal
* Intermediate objectives
* Progress (including training progress, if applicable)
* Planned services and goods (including providers and service dates)
* Comparable benefits
* Customer participation in cost of services
* Roles and Responsibilities

If the JAR does not result in substantive changes in the employment goal, the VR services to be provided, or the providers of the VR services, then an amendment is not required. Include a statement in the JAR case note to confirm that both customer and VR counselor agree that no changes are needed.

If the JAR results in substantive changes in the employment goal, the VR services to be provided, or the providers of the VR services, then an IPE amendment is required.  The results of the JAR can be documented in the IPE amendment case note.

If the JAR results in a need for new diagnostics to determine whether new services are needed, an IPE amendment is not necessary.  A service justification case note must be written in RHW explaining the necessity for the new diagnostics.  Once the results have been received and reviewed by the VR counselor and customer, if new services are required and agreed upon, an IPE amendment will be necessary to cover those services.

If the JAR results in a need for only new ancillary or supportive services to support services that already exist on the IPE or current IPE amendment, an IPE amendment is not required; instead, a service justification case note can be used to document the need for and authorization for these services. The start and end dates for the ancillary or supportive service must not go past the end date for the associated service on the IPE.

Refer to [E-300: Case Notes Requirements](https://www.twc.state.tx.us/files/partners/vrsm-e-300.docx) for additional information.

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