

Case Review Form

Reviewer: _____

Customer:
 Counselor:
 Office:
 Status: 26

Does the Case Record show....	NA	Y	N	Comments
5. An appointment for an initial interview was scheduled as soon as possible and no longer than 30 calendar days from initial contact.				
6. The individual or individual's representative completed, signed and dated the NHVR application form (VR-1)				
7. The date of application (the date the form is signed or the date the document is received as evidenced by a date stamp) is the same as the CSR date for status 02 (See VR1).				
8. There is a completed Personal Information Form in the file (PIF)				
9. There is evidence that the customer was provided with the information on the VR2 (or VR 2-2)				
10. Case notes include a initial interview or intake note that includes information regarding: Disability, Vocational/Work History, Vocational interest/goal; Education; Social /Recreational; Family/Financial; Strengths /Barriers and an analysis of the case which includes I&R provided				
11. If the individual is an SSI recipient or SSDI beneficiary at application (due to disability), was the individual presumed eligible? (Initial Interview Case				

Notes)				
12.If yes above, does the case contains verification of receipt of SSI/SSDI				
13.The customer was provided information about the VR program rights and responsibilities in a format that is understandable and accessible.				
14. By the end of the first meeting, the customer knew what would happen next, the time frames in which it would occur and who would be responsible				
15.The eligibility determination was made within 60 days of the submission of a completed (signed and dated) VR application.				
16.When the eligibility determination exceeds 60 days, there is a document or letter signed and dated by the applicant that extends the period during which eligibility will be determined and explains why the decision must be postponed.				
17.If the case file enters extended evaluation-a statement of eligibility for extended evaluation is signed/dated by the counselor. Dated the same as the CSR date for status 06, there is a plan for ext. eval. services that is signed & dated by the customer the same date as the date for status 06.				
18.There is evidence that the customer has a physical or mental impairment.				
19.The impairment constitutes or results in a substantial impediment to employment as				

evidenced by the relationship between the impairment and job tasks and/or tasks related to career advancement.			
20.The applicant requires vocational rehabilitation services to prepare for, secure, retain, or advance in employment consistent with the applicant's unique strengths, resources, priorities, concerns, abilities, capabilities, interests, and informed choice.			
21.The number of functional capacities affected, the number of primary services needed, and the time required to complete the needed services to reach the employment outcome were correctly assessed to determine significance of disability.			
22.The case progressed from application to eligibility determination with no gaps between decisions or the implementation of those decisions.			
23.The Certificate of Eligibility form in the file is signed and dated by the counselor and the date is the same as the status 10 date on the CSR.			
24.The individual was provided with information on the options for IPE development			
25.the individual received counseling and guidance regarding informed choice and selected the employment outcome, services and service providers.			

<p>26. the rationale for achieving an employment outcome and determining IPE services are based on the individual's unique strengths, resources, priorities, concerns, abilities, capabilities and informed choice?</p>				
<p>27. To the degree necessary to achieve an employment outcome, there is an assessment of all strengths, barriers, and disabilities, including the use of technology.</p>				
<p>28. There is an assessment of the career interests of the customer.</p>				
<p>29. The Action Plans created in comprehensive assessment were jointly developed.</p>				
<p>30. The case progressed from eligibility to plan development as soon as the employment outcome and the nature and scope of Vocational Rehabilitation services have been determined, but no longer than four months (120 days) after eligibility determination.</p>				
<p>31. If #30 above is <u>NO</u>, in cases where additional time is necessary to determine the employment outcome and the nature and scope of services to be included in the IPE, an Action Plan was developed that outlined the anticipated activities and timeline expected to develop the IPE.</p>				
<p>32. The Employment Plan (IPE) includes a statement of the long-range rehabilitation goals, the objectives, and the specific VR services to be provided.</p>				
<p>33. Were any services provided that were not planned in the IPE?</p>				

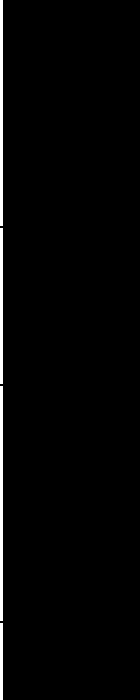
34. If yes to #33 above, were these services necessary for the achievement of an employment outcome? If no – explain briefly in comments				
35. Were there any services necessary for the achievement of an employment outcome that was not provided? (if not identify services that could have assisted the customer)				
36. Services planned and received are necessary to overcome identified employment barriers and accomplish the customer's job goal.				
37. The Employment Plan (IPE) identifies service providers as well as the funding source.				
38. The Employment Plan (IPE) includes appropriate time frames for necessary services.				
39. The Employment Plan (IPE) includes meaningful and measurable methods of evaluation of progress.				
40. The Employment Plan (IPE) includes terms and conditions under which goods and services will be provided in the most integrated setting.				
41. The Employment Plan (IPE) includes information identifying other related services and benefits that will enhance the capacity of the individual to achieve his/her objectives and job goal.				

42. There is an assessment of the need for post employment services and there is a plan for any necessary services.				
43. If extended services are needed (Supported Employment), there is a plan for the provision of these services.				
44. The Employment Plan (IPE) includes statements by the individual describing how he/she was informed about and involved in choosing among alternative goals, objectives, services, service providers, and methods used to provide or procure services.				
45. The Employment Plan (IPE) is in language that is understandable to the customer and in a format that is accessible to the customer.				
46. The case progressed from Employment Plan (IPE) development to service implementation with no gaps between decisions or the implementation of those decisions. Services were provided in a timely manner without undue delays or interruptions. The services were provided in the timeframes identified in the IPE. If there were delays or interruptions in services, these reasons for delays or interruptions are documented in the service record. If No , explain why the delay (or no explanation for delay provided in file)				
47. The Employment Plan (IPE) is signed and dated by the customer, and the date of the Plan is the same as the date on the CSR for status 12.				
48. The Employment Plan (and subsequent amendments) was jointly				

developed				
49. Amendments to the plan include services, service provider, timeframes and meaningful and measurable methods of evaluation of progress				
50. The Employment Plan (IPE) is reviewed at least annually with the customer; progress appraisals, reviews, and amendments are signed and dated by the customer. (CMS or paper (VR 9C) form				
51. Changes to the plan are documented by signed plan amendments (customer and counselor)				
52. The individual meets the eligibility requirements and is determined to be an individual with a most significant disability?				
53. The IPE specifies supported employment services to be provided by the Agency in order to achieve the rehabilitation objectives identified in the IPE				
54. The IPE specifies necessary extended services and identifies the source providing the extended services and that there is a reasonable expectation that those sources will become available				
55. Did the VR counselor provide career exploration and vocational guidance prior to the student leaving school?				
56. Was the IPE signed before the student with a disability left school?				
57. Available and appropriate resources from other programs or within the agency were used prior				

to the purchase of services.				
58. Case record demonstrates comparable benefit search				
59. Comparable benefits are included in the IPE				
60. Financial Need was fully explored and documented prior to expending agency funds unless services are exempt.				
61. The financial need form (VR-41) or FATF are updated at least annually.				
62. Evidence that counseling and guidance were provided by NHVR				
63. Evidence that need for assistive technology services and assistive devices were assessed and used as necessary at each stage of the VR process				
64. Evidence that the customer had opportunity to exercise informed choice throughout the VR process				
65. Evidence of continued contact and customer engagement throughout the process				
66. Case records are free of inappropriate alterations.				
67. If a CRP was used, referral for job placement / supported employment services was appropriate based on the needs of the customer				
68. If a CRP was used, the provider (CRP) was given clear information about customer's employment goals and expectations				
69. Staff are responsive to customer limitations to ensure equal access to the program (i.e. interpreters, reading level, home visits).				
70. The individual has achieved an employment outcome that is				

described in the individual's IPE and/or its amendments.				
71. Employment is competitive in location and wages. (there is verification that a) the individual's wage and level of benefits are not less than that customarily paid by the employer for the same or similar work performed by non-disabled individuals and b) the individual is compensated at or above the minimum wage).				
72. If no to #71 above due to customer receiving less that customarily paid, was an explanation in file.				
73. Employment is integrated.				
74. Employment is consistent with customer's informed choice.				
75. Employment is consistent with customer's strength's, resources, priorities, concerns, abilities, capabilities, interests, and informed choice.				
76. The individual and the VR counselor <ul style="list-style-type: none"> • Agree that the individual is performing well in employment, AND • The customer and counselor concur that the Employment Plan (IPE) has been completed and the customer is satisfied. 				
77. Substantial services were provided to the customer that were directly related to the employment outcome. The case record shows – the provision of services under the IPE has contributed to the achievement of the employment outcome				

<p>78.The case progressed from Employment Plan (IPE) to closure with no gaps between decisions or the implementation of those decisions.</p>				
<p>79.The closure is demonstrated in an amendment to the Employment Plan (IPE) that is signed by the customer.</p>				
<p>80.The case record contains evidence that the customer has maintained employment in the same job for at least 90 days and continues to work at the time of closure.</p>				
<p>81. were services provided in status 22, if yes list services in comments</p>				