

## **\*Section 6 - Record of Services**

### **Guidance**

The record of services should be used not only to meet legal requirements, but more importantly as a tool for the counselor and consumer to record and organize significant events in working together. It should include an ongoing narrative of significant facts that are relevant to the consumer's vocational rehabilitation. Case notes should be on the one hand concise, but on the other of sufficient detail to allow the reader to understand what is happening with the case and the rationale for decisions/actions made by BRS. To the maximum extent possible, the case notes should include only observable facts and may include an analysis of the facts, to the extent appropriate to the vocational rehabilitation profession. Counselors are encouraged to view the case record as joint property between the Bureau and each consumer. Entries in the case record should be written with the full expectation that the consumer or his/her *representative* will read it.

### **Legal Requirements**

- A. The record of services for each consumer must contain the following documentation, to the extent pertinent:
1. If the individual is found eligible, documentation supporting the eligibility determination;
  2. If the individual is found ineligible, documentation supporting that determination;
  3. If the case is closed for reasons other than an ineligibility determination, justification for closing the case;
  4. Documentation supporting that the individual has a *significant disability\** or *most significant disability\**, if applicable;
  5. If the individual requires trial work experiences or an extended evaluation to determine whether s/he can benefit from services, the plan and documentation supporting the need for this evaluation;
  6. The Employment Plan/IPE and any amendments;

7. The extent to which the consumer exercised *informed choice*\* regarding the provision of assessment services and the development of the Employment Plan, including the selection of the specific *employment outcome*\*, services needed to achieve that goal, service providers, the employment setting, setting in which the services will be provided, and methods to procure the services;
  8. If the Employment Plan provides for services or employment that is not *integrated*\*, justification to support the *non-integrated setting*\*;
  9. If the individual obtains *competitive employment*\*, verification that the individual is earning at or above minimum wage, and that the wage and benefits are not less than that paid by the employer to persons without disabilities doing the same or similar work;
  10. Results of annual reviews for consumers working in extended employment and/or earning less than minimum wage, the consumer's input in the reviews and the consumer's (or, if appropriate, his/her *representative's*\*) acknowledgement that those reviews were conducted;
  11. Documentation concerning any action or decision made as a result of an informal review, *mediation*\* or administrative hearing;
  12. If applicable, documentation of the consumer's request to amend his/her record in the event that BRS does not amend the documentation.
  13. If the case is closed as "rehabilitated" (St. 26), documentation that all of the requirements for this type of closure are met, including documentation that demonstrates that the services provided under the Employment Plan contributed to the achievement of the *employment outcome*\*;
  14. If the individual is referred to another program under the referral and information system, documentation of the nature and scope of services provided by BRS to the consumer and on the referral itself.
- B. A consumer who believes that information in his/her case record is inaccurate or misleading may request that BRS amend the information. If BRS does not amend the information, the consumer's request for an amendment must be documented in the case record.