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

Revised April 1, 2021

## B-204: Application

If VR staff cannot meet with the customer to complete the application for services at the time of the initial contact, the customer is scheduled for an appointment for the earliest possible date. The application appointment date will be no later than 30 days after the date of the initial contact, or a good faith effort shown to meet this requirement.

The Diagnostic Interview is typically scheduled with the VR counselor at the same time the application for services is completed. For information on the Diagnostic Interview, refer to [B-205: Diagnostic Interview](https://twc.texas.gov/vr-services-manual/vrsm-b-200#b205).

A customer is not required to be physically present in the VR office at the time of application for services, but the individual must be present in Texas to apply for VR services. The customer or their representative can participate by phone or complete the application at an off-site location, such as in a school or at their home. However, an application is not complete until a signature is obtained from the customer or the customer's authorized representative on the application for services.

When scheduling an appointment to complete an application for services with a customer, the VR staff determines the customer's:

* language preference; and/or
* need for:
  + a translator;
  + sign-language interpreter services;
  + reasonable accommodations;
  + assignment to a specialty caseload; and
  + other support services to facilitate the application and eligibility process.

### B-204-1: Application Process

Any individual who wants to apply for VR services must be allowed to do so.

When appropriate, the VR staff uses the Application Appointment Letter in RHW to schedule the appointment. This ensures that a record of this appointment is captured in RHW. If RHW is not available, VR staff schedules the appointment and completes the RHW Application Appointment Letter in RHW as soon as possible.

The customer is encouraged to bring the following information, which will assist in completing the application and moving the case through the VR process:

* photo identification (for example, a driver's license, state issued ID, school ID, passport, or military ID) and Social Security card;
* names and addresses of doctors seen recently;
* names and addresses of schools attended;
* information about medical insurance, including Medicaid and Medicare;
* a list of the customer's places of employment, including the type of job, dates, reason for leaving, and salary;
* if currently employed, documentation showing employment start date (for example, pay stub identifying start date, self-employment worksheets indicating start date, or verification from the employer via email, fax, or letter verification);
* proof of income information for the customer and proof of income for the customer's spouse or parents, if the spouse or parents claim the customer as a dependent on their federal income tax (for example, a copy of the most recent pay statement, an award letter for Supplemental Security Income (SSI) and/or Social Security Disability Insurance (SSDI) or another Title II disability benefit or Veterans Affairs (VA) benefit, or a Notice of Payment for workers' compensation.
* proof of expenses related to the customer's monthly mortgage or rental payments, prescribed diets and medicines, debts imposed by court order, medical costs, and disability related expenses;
* names, addresses, and phone numbers of two individuals who can contact the customer;
* reports of recent medical exams, school records, or other information that may help VR understand the customer's disability; and
* the customer's Ticket to Work, if the customer is receiving SSDI benefits and has been issued one.

If a customer does not have all the information listed above, VR staff must not delay scheduling or completing the application for services.

An option called "fast track" is available to complete the RHW application for returning customers when:

* it is within a year from when their previous case was closed; and
* the customer has the same disability as in their previous closed case.

Fast track will copy some of the customer's application information from the previous case to the new case. VR staff must verify all information including any wages and monthly financial information to ensure that the copied information is still accurate.

The VR staff member who is taking the application for services provides copies of the following:

* VR5057, VR Program Application Statement with the customer's signature from the RHW Application page,
* "Can We Talk? Appeal Procedures for Applicants and Customers," which explains VR's appeal and mediation procedures
* "A Guide for Applicants," which explains:
  + services and outcomes;
  + options for developing the IPE;
  + components of the IPE;
  + the customer's right to appeal; and
  + services available from the Client Assistance Program.

VR staff explains the basic content of each of the documents and their purpose to the customer. A case note is entered in RHW documenting the date and method the information was provided to the customer.

The application must be completed in a location that is private enough to maintain the confidentiality of the information provided by the customer.

During the meeting, VR staff:

* explains to the customer:
  + the purpose and expected outcomes of vocational rehabilitation;
  + VR expectations of the customer;
  + the roles of the VR counselor and customer; and
  + the customer's rights;
* explains to the customer the circumstances under which the customer's personal information is released;
* obtains the signatures required on the application and all other required forms, including the following to allow VR to collect and disclose information:
  + [VR5061, Notice and Consent for Disclosure of Personal Information](http://intra.twc.state.tx.us/intranet/gl/html/vocational_rehab_forms.html);
  + [VR5060, Permission to Collect Information](http://intra.twc.state.tx.us/intranet/gl/html/vocational_rehab_forms.html), (if needed);
  + [VR1517-2, Authorization for Release of Confidential Customer Records and Information](http://intra.twc.state.tx.us/intranet/gl/html/vocational_rehab_forms.html), (if needed); and
  + One [SSA 3288, Consent for Release of Information](https://intra.twc.texas.gov/intranet/vrs/html/benefitsplanning.html) to obtain a Benefits Planning Query (BPQY) for SSI/SSDI recipients (if needed).
* explains in detail the expected outcomes and services related to the VR; and
* gathers, reviews, and documents the information necessary to determine whether the customer is eligible for services.

Note: For more information on completing the SSA 3288, refer to the [Supplemental Security Income (SSI) / Social Security Disability Insurance (SSDI) Benefits Planning](https://intra.twc.texas.gov/intranet/vrs/html/benefitsplanning.html) intranet page.

Refer to [VRSM A-210: PIN and Signature Procedures](https://twc.texas.gov/vr-services-manual/vrsm-a-200#a210) for more information on signatures.

The information for the application may be entered into RHW by any VR staff.

When RHW is not available, VR staff:

* prints (when a printer is available) a paper copy of the [VR5056, Application for Vocational Rehabilitation Services](https://twc.texas.gov/forms/index.html), and records the information by hand or completes the form electronically;
* obtains signatures on the completed VR5056 per [VRSM A-210-5: Signature Procedures](https://twc.texas.gov/vr-services-manual/vrsm-a-200#a210-5);
* transfers the information from the VR5056 into RHW as soon as RHW is available (Note: The signature dates that are entered in RHW must match the signature dates that are on the VR5056.);
* keeps a copy of the paper application in the case file after the data has been entered in RHW;
* files the signed forms according to procedures in [D-303: Case File Organization](https://twc.texas.gov/vr-services-manual/vrsm-d-300#d303); and
* mails or emails the customer a copy of the VR5057, VR Program Application Statement with the customer’s signature from the RHW Application page.

**Identification in ReHabWorks**

ReHabWorks (RHW) contains a Preferred Name field after the middle name on the Initial Contact page. This field is open to all customers who have a nickname they wish to be called. If a customer has not legally changed his or her name but prefers to be identified by another name, it should be documented in this field.

RHW includes the current Rehabilitation Services Administration value descriptions for gender with the following values:

* Individual indicates that he is a male.
* Individual indicates that she is a female.
* Individual did not self-identify with a particular sex.

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