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| CSG Client Services Guide | Date Issued 10/15/20 | Subject Case Types, Status Codes, Case Management and Service Categories | Section 100 |
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Federal Regulations

[34 CFR 361.5](#) - Definitions

[34 CFR 361.56](#) - Requirements for closing record of services of a client who has achieved an employment outcome

State Rules

[5 CSR 20-500](#)

Section 100 CASE TYPES, STATUS CODES, CASE MANAGEMENT & SERVICE CATEGORIES

100 CASE TYPES

- PE case type: Potentially eligible (PE) refers to all students with documented disabilities who have not applied for the VR program nor been considered eligible for services. They may receive pre-employment transition services.
- VR case type: Refers to all individuals with documented disabilities who have applied for or have been determined eligible for services.

110 STATUS CODES

- The counselor provides services in accordance with a case status system that is designed as
 - a management tool for the counselors;
 - an aid to report client progress; and
 - an aid in evaluating counselor or agency performance.

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120 CASE MANAGEMENT

120.1 Application

- To determine the date an individual enters application status, use
 - the date he or she signs, in person or electronically, an application for services and has met with the vocational rehabilitation (VR) representative for initial interview;
 - the date an application is stamped “received” from a guardian/parent via mail or drop off;
 - the facsimile strip date, if received by fax; or
 - the email header date, if received by email.

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- Living Arrangement at Application: The purpose is to identify where the individual is living temporarily or permanently.
- Referral Source at Application: Report the source that first referred the individual to the VR agency.
- Income and Household Information
- Public Support at Application for Applicant Only: Public support refers to cash payments made by federal, state and/or local governments for any reason including an individual's disability, age or economic status.
 - Include payments to a family unit precipitated by the individual's disability or when the individual's presence is taken into account in the computation of the family benefit.
 - Include any payments that are sent directly to the individual in an institution or to dependents on his or her behalf.
 - Exclude any non-cash support payments such as Medicaid, Medicare, food stamps and rental subsidies.
 - Select any of the categories below that apply to the type of public support the individual is receiving at application and enter the amount to the nearest dollar. If the individual receives two or more types of support, record the amount from each source.
 - Social Security Disability Insurance (SSDI) – Enter the monthly amount of SSDI received. This figure can be verified through the Social Security Administration (SSA) or from a copy of the individual's benefit notification letter.
 - Supplemental Security Income Aged/Blind/Disabled (SSI) – Enter the monthly amount received under the federal program of SSI for the aged, blind and disabled. Only the individual's portion of the payment should be recorded here. This figure can be verified through SSA or from a copy of the individual's benefit notification letter.
 - Temporary Assistance for Needy Families (TANF) – Enter the monthly amount of cash public assistance payments made through the federally-funded TANF program.
 - General Assistance (state or local government) – Enter the monthly amount of public support received.

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- Veterans' Disability Benefits (VA) – Enter the monthly amount received from the U.S. Department of Veterans Affairs for partial or total disability.
- Workers' Compensation – Enter the monthly amount of support received.
- Unemployment Insurance – Enter the monthly amount of support received.
- Other Disability (e.g., private disability insurance, private charities) – Enter the monthly amount of support received.
- All Other Public Support – Enter the monthly amount of cash payments beyond those otherwise listed including payments made to the individual by federal, state and local governments for retirement or survivor benefits and other temporary payments.

NOTE: If a person is supported by the earnings of a spouse, or by the spouse's unemployment insurance checks, select "Family and Friends" as the Primary Source of Support.

- Medical Insurance Information at Application: Select the individual's medical insurance coverage. More than one type can be selected.
- Veteran: Endorse if the client served in the active military, naval or air service, and was discharged or released under conditions other than dishonorable.
- Personal Information at Application
 - Race: For students or youths with disabilities in elementary or secondary education, reporting on race is required. If a student or youth refuses to identify his or her race, at a minimum, notify the individual that if he or she fails to self-identify, an observer-identification method will be used to provide the best assessment of the individual's race.
 - For individuals not in elementary or secondary education, self-identification is required. If the individual refuses to self-identify, indicate the individual did not self-identify.
 - For any individual reporting as multi-racial, use more than one race variable indicating the individual is of that race.

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120.2 Application – E (Eligibility Determination Extension)

- An individual enters this status on the date the counselor knows eligibility cannot be determined within 60 days.
 - Eligibility Determination Extension Agreement Date: The date on which the extension was agreed upon by the counselor and individual.
 - Agreed to Extend Eligibility Extension Until: The specific date the eligibility determination will be extended as agreed upon by the counselor and individual.

NOTE: Supporting documentation is required. Case note verification or letter with client's signature is acceptable.

120.3 Application – T (Trial Work Experiences)

- Trial Work Experiences are pre-eligibility assessment activities for individuals with the most significant disabilities.
 - Prior to any determination that an individual with a disability is unable to benefit from vocational rehabilitation services in terms of an employment outcome due to the severity of that individual's disability, or that the individual is ineligible for vocational rehabilitation services, conduct an exploration of the individual's abilities, capabilities and capacity to perform in realistic work situations.
 - An individual enters this status on the date the counselor decides more information is needed to determine if the individual can benefit from VR services in terms of an employment outcome, and
 - a Trial Work Plan is agreed to and signed by the individual or guardian.

120.4 Eligible ([See CSG Section 300](#))

- The Date of Eligibility Determination is the date on which the eligibility determination form was approved by a counselor II or above, or district supervisor/assistant district supervisor, and has been assigned a priority category currently being served.
 - If greater than 90 days is needed in order to develop an Individualized Plan for Employment (IPE), the Plan Development Extension process must be used.

NOTE: Supporting documentation is required. For example, a copy of the eligibility determination letter sent to the individual can be used.

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120.5 Education Page

- Education Page information is required for all clients in high school, college, career/technical programs (credential and non-credential) and training programs.
- Choose the level of education at the time a client becomes enrolled.
 - Secondary (high school): All secondary level goals begin in July and end in June.
 - Educational Goal: this is secondary education.
 - Begin Date: this is July/current year and is entered when the case is opened.
 - Actual End Date: this is June/year of graduation and is entered when a diploma is received or HiSET completion.

NOTE: Supporting documentation is required. Enter a case note documenting graduation or HiSET completion.

- Postsecondary (College):
 - Educational Goal: this is postsecondary education.
 - Begin Date: this is July/current year if the client is transitioning from secondary to post-secondary. Begin Date also reflects semester dates when opening a case and the counselor and client agree to post-secondary service.
 - Actual End Date: this is the completion of an academic year with passing grades (2.0).

NOTE: Supporting documentation is required. A copy of the transcript or report card can be used.

- Skill Progression Related Activity: this seeks to capture successful passage of an EXAM required for a particular occupation or progress in attaining a trade-related benchmark. Examples are CRP training, certificate programs, exams required for employment, EPA exam, Commercial Driver's License (CDL) or Automotive Service Excellence (ASE).
 - Educational Goal: this is Skills Progression Related Activity.
 - Begin Date: this is the start date of activity.
 - Actual End Date: this is the date the goal is completed.

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NOTE: Supporting documentation is required. Case notes would document achieved test results.

- Training Milestones: these capture satisfactory progress toward skills advancement within an on-the-job training (OJT), one year completion in a registered apprenticeship or wage gain in an apprenticeship. This type of gain includes OJTs and apprenticeships.
 - Educational Goal: this is a Training Milestone.
 - Begin Date: this is the start date of an OJT or apprenticeship.
 - Actual End Date: this is the date the goal is completed.

NOTE: Supporting documentation is required. A case note documenting the completion of an OJT or one-year apprenticeship can be used.

- Adult Secondary Education: this captures advancement of educational levels by a pre-test and post-test for adult students with no high school diploma. An example might be improving from 9th grade math to 10th grade math on the TABE test.
 - Educational Goal: this is Adult Secondary Education.
 - Begin Date: this is the date of the TABE pre-test.
 - End Date: this is the date of the TABE post-test.

NOTE: Supporting documentation is required. This can include a copy of the pre- and post-test for the TABE or HiSET results.

120.6 Student with a Disability

- This element captures the status of a client with a disability during the life of the case.
 - This client is not a student with a disability in secondary education at the time of application.
 - This client is a student with a 504 accommodation plan.
 - This client is a student and is receiving services under an individualized education plan (IEP) at the time of application.
 - This client is a student with a disability who is not covered by Section 504 of the Rehabilitation Act and is not receiving services under an IEP at the time of application.
- “Student with Disability” is based on enrollment, age and disability. If all three meet guidelines, AWARE populates “Yes.”

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120.7 Delayed ([See CSG Section 300](#))

- A client enters this status, by date of application, when determined eligible to receive services, and the client is not in a priority category currently being served.

120.8 Eligible – E (Plan Development Extension) ([See CSG Section 500](#))

- A client enters this status on the date the counselor knows he or she will be unable to develop an IPE within 90 days of eligibility.
 - Plan Development Extension Agreement Date: The date the extension was agreed upon by the counselor and individual.
 - Agreed to Extend Plan Development Until: The specific date to which plan development will be extended as agreed upon by the counselor and client.

NOTE: Supporting documentation is required. Case note verification or letter with client’s signature is acceptable.

120.9 Special Programs

- Special Programs are to be coded at the time the special program begins. Additionally, review Special Programs at the time of case closure in the case management system to ensure coding is correct.

120.10 Characteristics at Plan

- Education at Plan
- Employment at Plan
 - Work Status at Plan:
 - Competitive Integrated Employment
 - Employed (Received Notice of Termination)
 - Employed (Received WARN – Worker Adjustment and Retraining Notification)
 - Employed (Transitioning Service Member): An individual in active duty status who registers for employment services and is within 24 months of retirement or 12 months of separation.
 - Extended Employment: Employment in non-integrated or sheltered setting
 - Not Employed (All Other Students)

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- Not Employed (Other)
 - Not Employed (Student in Secondary Education)
 - Not Employed (Trainee, Intern or Volunteer)
 - Self-Employment
- Long-Term Unemployment: A participant who has been unemployed for 27 or more consecutive weeks.
- Program Involvement
 - Adult Education and Literacy (AEL): Academic instruction and education services below the postsecondary level that increases an individual's ability to read, write and speak in English and perform mathematics or other activities necessary for the attainment of a secondary school diploma or its recognized equivalent, transition to postsecondary education and training, and obtain employment.
 - Adult Employment and Training Activities: The purpose of the adult program is to increase the employment, job retention, earnings and career advancement of U.S. workers by providing quality employment and training services to assist eligible individuals in finding and qualifying for meaningful employment and to help employers find the skilled workers they need to compete and succeed in business. Adult program services could include:
 - Individualized career exploration
 - Career services
 - Financial assistance for training
 - Job training
 - Job search and placement
 - Support for work related expenses
 - Dislocated Worker: Services provided by a workforce development board. Title I considers a Dislocated Worker as someone who
 - has been terminated/laid off or received notice of termination/layoff, is eligible for or exhausted unemployment insurance benefits, or able to demonstrate to the Title I program that duration of employment meets the criteria and is unlikely to return to previous industry or occupation; or
 - has been terminated/laid off or received notice of termination/layoff due to permanent closure or substantial layoff; or
 - works in a facility that has made a general announcement of closure within 180 days or a general announcement that the facility will close; or

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- was self-employed but is now unemployed as a result of general economic conditions due to natural disasters; or
- is a displaced homemaker; or
- is the spouse of a member of the Armed Forces on active duty who has experienced loss of employment due to relocation.
- Job Corps: It is a no-cost education and vocational training program administered by the U.S. Department of Labor that helps young people ages 16 - 24 improve the quality of their lives by empowering them to get great jobs and become independent. Job Corps helps individuals:
 - Learn a career
 - Earn a high school diploma or GED
 - Find and keep a good job
- Department of Veterans Affairs (VA) Vocational Rehabilitation – For veterans and service members: Vocational Rehabilitation and Employment services help with job training, employment accommodations, resume development, and job seeking skills coaching. Other services may be provided to assist veterans and service members in starting their own businesses or independent living services for those who are severely disabled and unable to work in traditional employment. VA's Education and Career Counseling program is a great opportunity for veterans and service members to get personalized counseling and support to help guide their career paths, ensure the most effective use of their VA benefits and achieve their goals.
- Wagner-Peyser Employment Service Program: The Wagner-Peyser/Employment Services program focuses on providing a variety of employment-related labor exchange services, including but not limited to job search assistance, job referral and placement assistance for job seekers; re-employment services to unemployment insurance claimants, and recruitment services to employers with job openings. Services are delivered in one of three modes including self-service, facilitated self-help services, and staff assisted service delivery approaches. Depending on the needs of the labor market, other services, such as job seeker assessment of skill levels, abilities, aptitudes, career guidance when appropriate, job search workshops, and referral to training, may be available.

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- Youth Services: The title I Youth program focuses on assisting out-of-school youth and in-school youth with one or more barriers to employment prepare for
 - post-secondary education and employment opportunities;
 - attain educational and/or skills training credentials; and
 - secure employment with career/promotional opportunities.
- YouthBuild: This program serves 16 - 24 year-old youths who are high school dropouts or those who have dropped out and subsequently re-enrolled. YouthBuild participants also must be one of the following: member of a low-income family, in foster care, an offender, an individual with a disability, the child of a current or formerly incarcerated parent, or a migrant youth. The YouthBuild program
 - assists students with attainment of a secondary school diploma or its recognized equivalent;
 - assists with training in mastering the skills and industry-recognized certifications they need to succeed in high-demand careers through hands-on work experience and certification processes; and
 - includes a strong emphasis on leadership development, community service, and soft-skills competencies.
- Barriers to Employment
 - Foster Care Youth
 - Individual currently in foster care or was previously in the foster care system but aged out.
 - Individual is not in foster care.
 - Homeless Individual
 - Individual is homeless living on the streets or elsewhere, residing in temporary housing, runaway youth or resides with a migrant worker.
 - Individual is not homeless.
 - Ex-offender
 - Individual has been subject to any stage of the criminal justice process for committing a status offense or delinquent act or requires assistance in overcoming barriers to employment resulting from a record of arrest or conviction.
 - Individual does not meet the definition of ex-offender (see above).
 - Individual did not self-identify.
 - Low Income

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- Receives, or is a member of a family receiving, or in the six months prior to application, received SSI, TANF or food stamps (SNAP)
- Is a youth living in a high poverty area, or is homeless, or is eligible to receive a free or reduced price lunch, or is a foster child
- Is not low income
- English Language Learner
 - English as a second language is an English language learner who has limited ability in speaking, reading, writing or understanding the English language (native language is a language other than English or lives in a family or community environment where a language other than English is the dominant language).
 - Individual does not have limited English skills.
- Basic Skills Deficient/Low Levels of Literacy
 - Individual (youth or adult) who has English reading, writing or computing skills at or below the 8th grade level on a generally accepted standardized test; or who is unable to compute and solve problems, or read, write, or speak English at a level necessary to function on the job in the individual's family or in society.
 - Individual is not basic skills deficient.
- Cultural Barriers
 - Individual perceives himself or herself as possessing attitudes, beliefs, customs or practices that influence a way of thinking, acting or working that may serve as a hindrance to employment.
 - Individual does not perceive himself or herself in this fashion (see above).
 - Individual did not self-identify.
- Single Parent
 - Individual is a single parent if they are single, separated, divorced or widowed and have primary responsibility for one or more dependent children under age 18.
 - Individual is not a single parent.
 - Individual did not self-identify.
- Displaced Homemaker
 - Individual who has been providing unpaid services to family members in the home, has been dependent on the income of another family member, but is no longer supported by that income and is unemployed or underemployed.

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- Individual who is the dependent spouse of a member of the Armed Forces on active duty and whose family income is significantly reduced because of a deployment, a call or order to active duty, a permanent change of station, or the service-connected death or disability of the member, and is unemployed or underemployed.
- Individual is not a displaced homemaker
- Migrant and Seasonal Farmworker
 - Individual with low-income who for 12 consecutive months out of the 24 months prior to application has been primarily employed in agriculture or fish farming labor that is characterized by chronic unemployment or underemployment and faces multiple barriers to economic self-sufficiency.
 - Individual is a seasonal farmworker whose agricultural labor requires travel to a job site such that the farmworker is unable to return to a permanent place of residence within the same day.
 - Individual is a dependent of a seasonal or migrant seasonal farmworker.
 - Individual is not a migrant or seasonal farmworker.
- Will Exhaust TANF (temporary assistance for needy families) within Two Years
 - Individual is within two years of exhausting lifetime eligibility for TANF regardless of whether receiving these benefits at the time of the initial IPE.
 - Individual is receiving TANF benefits but does not meet the condition above.
 - Individual has never received TANF or has already exhausted lifetime TANF eligibility.

120.11 Service

- The IPE is effective on the date
 - the counselor and the individual reach an agreement, and
 - is approved by a counselor II or above, a district supervisor or assistant district supervisor as indicated by the signatures and dates on the IPE.
- If the two signatures bear different dates, the later date should be considered the effective date of the IPE.

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NOTE: Supporting documentation is required. An example of supporting documentation is a copy of the signed IPE. The counselor II, district supervisor or assistant district supervisor will put a date by each signature line when approved.

120.12 Service – J (Service Job Ready) – (optional)

- Date client begins actively looking for employment after receiving other VR services.

120.13 Service – E (Service Employed)

- A client enters this status when employment starts, but the “Start 90 Day Count” date has not been entered.

120.14 Service – I (Service Interrupted) – (optional)

- A client enters this status on the date when services that have been provided under an IPE need to be interrupted.
 - Diagnostic and/or other evaluation/assessment services may be provided while the client is in interrupted status.
 - In providing quality customer service, contact the client within 90 days to re-engage the client or evaluate the need for closure.

120.15 Employed

- A client enters this status when he or she has obtained competitive integrated employment following receipt of substantial services that led to the employment outcome and indicating a “Begin 90 Day Count” date moves it to Employed status.
 - A minimum of 90 days in Employed status is required before the case can be closed as Employed – Rehabilitated.
 - In providing quality customer service, contact with the client should be monthly, at a minimum, to help ensure a successful employment outcome.

NOTE: Supporting documentation is required. Examples include detailed case notes completed by the counselor including the date employment start date verification was received and justification for individual not providing formal documentation, or a pay stub identifying the individual’s start date (for verification of services).

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- Employment Page
 - Work Status: For a client who achieved an employment outcome, choose one of the following statuses that best describes the primary employment outcome of the client when his or her case was closed:
 - Employment in Competitive Integrated Setting is full-time or part-time employment in an integrated setting without ongoing support services. Do not select for clients who received supported employment services or who are self-employed.
 - Employment with Supports in Integrated Setting is full-time or part-time employment in an integrated setting with ongoing support services for clients with most significant disabilities.
 - Self-employment (except Business Enterprise Program, a Rehabilitation Services for the Blind [RSB] program) is work for profit or fees including operating one's own business, farm, shop or office. Self-employment includes sharecroppers but not wage earners on farms.

- Continued Employment
 - A client may have more than one job, consecutively or concurrently, during the 90-day Employed status and still meet the requirements of a successful closure if each job is consistent with
 - the employment goal stated in the IPE, and
 - the client's unique strengths, resources, priorities, concerns, abilities, capabilities, career interests and informed choice.
 - Consecutive jobs – Employment is considered consecutive and does not require a new 90-day Employed status if the
 - criteria for successful closure are met, and the client changes jobs with no gap in employment, is promoted by the same employer with no gap in employment, or changes jobs with a gap in employment of fewer than two weeks.
 - Concurrent jobs – A client may have more than one job at the same time during the 90-day Employed status.
 - Two or more Employment Pages can be entered. Ensure accurate wages and hours are entered for each job.
 - Use a case note to document that the client is working concurrent jobs, why working two or more jobs is preferred and how that supports a successful closure.

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- Stability during the 90-day Employed status is critical. During this time, the counselor monitors the client's job stability and ensures that he or she no longer needs VR services. The counselor can provide guidance and counseling if needed for the entire 90-day Employed status.

120.16 Closed Rehabilitated

- Competitive integrated employment refers to work
 - in the competitive labor market that is performed on a full-time or part-time basis in an integrated setting; and
 - for which a client is compensated at or above the minimum wage, but not less than the customary wage and level of benefits paid by the employer for the same or similar work performed by clients who are not disabled.
- Employment outcome means
 - entering, advancing in or retaining full-time or, if appropriate, part-time competitive integrated employment, including customized employment, supported employment, self-employment, telecommuting, or business ownership, that is consistent with a client's unique strengths, resources, priorities, concerns, abilities, capabilities, interests, and informed choice.
- Clients who are closed as rehabilitated must, at a minimum:
 - Have received appropriate diagnostic and related services
 - Have been declared eligible
 - Have had an IPE formulated
 - Have completed the program to the extent possible
 - Have been provided substantial services including counseling and/or one or more other rehabilitation services
 - Have been successfully employed for at least 90 days
- Guidance
 - Assure the job goal is consistent with the client's unique strengths, resources, priorities, concerns, abilities, capabilities, interests, and informed choice, and there are no further services needed by the client.
 - Document verification of suitable employment in a case note.
 - Send notification of closure in writing (Closure Letter), as well as in any other appropriate form of communication, informing the client of case closure, his or her individual rights, and the availability of PES services.
 - Contact the client by phone, email or letter to verify employment.

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- Employment verification, to include a review of the client's current hour and wage information, must be made on or after the 90th day of employment and be documented in a case note.
- If unable to contact the client directly, contact the employer, family member, guardian, case manager, probation officer, or other individual with direct knowledge of the client's employment situation. This cannot be organizations, vendors or individuals who provided paid services related to the job placement.
- The occupation at closure must be consistent with the employment goal identified on the client's IPE. The majority of the client's earnings must be derived from this occupation.
- A comment is required if one of the following applies:
 - Services were discontinued.
 - Client returns to same or similar employment.
 - If during the 90-day period there was an interruption, address the change of employment and interruption.
 - Guidance and counseling is the only service provided.
- All counselors should submit the case to the district supervisor, or his or her designee, for review and approval of closure.
- Referral to other agencies – Throughout the casework process, it is important for the counselor to be knowledgeable of other programs and services available and to utilize these when indicated. At the time of closure, consideration should be given to referring clients to other community programs and agencies if there are indications they may be of service to the client.
- Public Support at Closure for Client Only: Public support refers to cash payments made by federal, state and/or local governments for any reason including a client's disability, age or economic status.
 - Include payments to a family unit precipitated by the client's disability or when the client's presence is taken into account in the computation of the family benefit.
 - Include any payments that are sent directly to the client in an institution or to dependents on his or her behalf.
 - Exclude any non-cash support payments such as Medicaid, Medicare, food stamps and rental subsidies.
 - Select any of the categories below that apply to the type of public support the client was receiving at closure and enter the amount to the nearest

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dollar. If the client receives two or more types of support, record the amount from each source.

- Social Security Disability Insurance (SSDI) – Enter the monthly amount of SSDI received. This figure can be verified through the Social Security Administration (SSA) or from a copy of the client's benefit notification letter.
- Supplemental Security Income Aged/Blind/Disabled (SSI) – Enter the monthly payment received under the federal program of SSI for the aged, blind and disabled. Only the client's portion of the payment should be recorded here. This figure can be verified through SSA or from a copy of the client's benefit notification letter.
- Temporary Assistance for Needy Families (TANF) – Enter the monthly amount of cash public assistance payments received through the federally-funded TANF program.
- General Assistance (state or local government) – Enter the monthly amount of public support received
- Veterans' Disability Benefits (VA) – Enter the monthly amount received from the U.S. Department of Veterans Affairs for partial or total disability.
- Workers' Compensation – Enter the monthly amount of support received.
- Unemployment Insurance – Enter the monthly amount of support received.
- Other Disability (e.g., private disability insurance, private charities) – Enter the monthly amount of support received.
- All Other Public Support – Enter the monthly amount of cash payments beyond those otherwise listed including payments made by federal, state and local governments for retirement or survivor benefits to the client and other temporary payments.

NOTE: If a person is supported by the earnings of a spouse, or by the spouse's unemployment insurance checks, select "Family and Friends" as the Primary Source of Support.

- Medical Insurance Information at Closure: Select the individual's medical insurance coverage. More than one type can be selected.
- Multiple Occupations at Closure

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- Prior to case closure, when a client is working multiple jobs, update the primary occupation.
- For clients exiting the VR program with multiple jobs, the Occupation at Closure data element should be populated with the code for the occupation consistent with the employment goal on a client's IPE and primary Standard Occupational Classification (SOC) codes from which the exiting client derives the majority of his or her earnings. The following procedures should be followed to determine which occupation code to use:
 - If the multiple jobs' earnings are reported at the time of entering the occupation code, enter the occupation consistent with the employment goal specified on the IPE that encompasses the majority of the earnings at closure.
 - If neither hours nor wages per occupation are known, then individual self-reporting of the primary occupation consistent with the employment goal specified on the IPE should be used to determine the appropriate occupation code.
- For the employment situations unique to the VR program, use the special codes indicated below.

NOTE: The current SOC System should be referenced in obtaining the six-digit code that most closely corresponds to the client's primary occupation at closure.

- Weekly Earnings at Closure
 - Prior to case closure, update hours and wages.
 - Enter the wages to the nearest dollar. Include all income from wages, salaries, tips and commissions received as income before payroll deductions of federal, state and local income taxes and Social Security payroll tax. Earnings also include profits derived from self-employed individuals. Earnings for salespersons, consultants, self-employed clients, and other similar occupations are based on the adjusted gross income. Adjusted gross income is gross income minus unreimbursed business expenses. Do not include estimates of payments in-kind, such as meals and lodging. Estimate profits of farmers, if necessary.
 - Where earnings are based on commissions that are irregular (e.g., real estate, automobile sales), to obtain a meaningful figure for a typical

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week's earnings, it should be calculated as a weekly average over a representative period of time such as one month or longer.

- When, because of the occupation/situation, there are significant amounts of unreimbursed business expenses that are irregular (e.g., car lease payments due the first week of every month), the expenses should be averaged over a representative period of time such as one month or longer to obtain a meaningful figure for a typical week's business expenses.
- Commissions are generally not paid when earned but rather are paid periodically, such as weekly, biweekly or even monthly. To bring standardization to this item, earnings should be based on the actual receipt of the payment and not on amounts accruing until the next commission payout.

NOTE: The calculated hourly wage should be equal to or greater than minimum wage.

- Hours Worked Per Week at Closure
 - Enter the number of hours the client worked for earnings in a typical week.

120.17 Closed – Other than Rehabilitated

- Cases are closed in this status if they are ineligible/unable to benefit from services or have not achieved a successful employment outcome.
- Initiating Document or Action
 - Decision by the counselor that client is not eligible for services based upon eligibility criteria or any other reason listed above.
- Guidance
 - Provide client the opportunity for consultation.
 - Send notification of closure (Closure Letter) in writing to client, as well as in any other appropriate form of communication, informing the client of case closure and his or her individual rights and the availability of the Client Assistance Program. Allow 10 business days for client to respond to letter prior to case closure.
 - Counselors without closure ability will submit case to the district supervisor, or his or her designee for review and approval of closure.
 - Referral to other agencies – Throughout the casework process, it is important for the counselor to be knowledgeable of other programs and

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services available and to utilize these when indicated. At the time of closure, refer clients to other community programs and agencies if there are indications they may be of service to the client.

- When trial work experiences cannot be completed for reasons other than ineligibility, the case should be closed using the appropriate reason.
- If the case is certified ineligible because of “disability too severe/unable to benefit, no impairment/disabling condition, no impediment to employment, or does not require VR services,” summarize the circumstances that support the reason for closure on the Closure document in the case management system. Discuss annual review with client if the reason for closure is disability too severe.
- Applicants closed for reason “disability too severe/unable to benefit” may benefit from independent living services and should be considered, if appropriate, for referral to agencies serving this population.
- **Public Support at Closure for Client Only:** Public support refers to cash payments made by federal, state and/or local governments for any reason including a client's disability, age or economic status.
 - Include payments to a family unit precipitated by the client's disability or when the client's presence is taken into account in the computation of the family benefit.
 - Include any payments that are sent directly to the client in an institution or to dependents on his or her behalf.
 - Exclude any non-cash support payments such as Medicaid, Medicare, food stamps and rental subsidies.
 - Select any of the categories below that apply to the type of public support the client was receiving at closure and enter the amount to the nearest dollar. If the client receives two or more types of support, record the amount from each source:
 - Social Security Disability Insurance (SSDI) – Enter the amount of SSDI received by the client each month. This figure can be verified through the Social Security Administration (SSA) or from a copy of the client's benefit notification letter.
 - Supplemental Security Income Aged/Blind/Disabled (SSI) – Enter the monthly payment to the client under the federal program of SSI for the aged, blind and disabled. Only the client's portion of the payment should be recorded here. This figure can be verified through SSA or from a copy of the client's benefit notification letter.

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- Temporary Assistance for Needy Families (TANF) – Enter the amount of cash public assistance payments made through the federally-funded TANF program.
- General Assistance (state or local government) – Enter the monthly amount of public support received
- Veterans' Disability Benefits (VA) – Enter the monthly amount received from the U.S. Department of Veterans Affairs for partial or total disability.
- Workers' Compensation – Enter the monthly amount of support received.
- Unemployment Insurance – Enter the monthly amount of support received.
- Other Disability (e.g., private disability insurance, private charities) – Enter the monthly amount of support received.
- All Other Public Support – Enter the monthly amount of cash payments beyond those otherwise listed including payments made by federal, state and local governments for retirement or survivor benefits to the client and other temporary payments.

NOTE: If a person is supported by the earnings of a spouse, or by the spouse's unemployment insurance checks, select "Family and Friends" as the Primary Source of Support.

- Medical Insurance Information at Closure: Select the individual's medical insurance coverage. More than one type can be selected.

120.18 Closure Status Codes

- Closed – Other than Rehabilitated
 - Dated when case is closed for any reason other than Rehabilitated.
- Closed – Rehabilitated
 - Dated when case is closed from Employed, after client has been successfully employed for greater than 90 days.

120.19 Reason for Closed – Other than Rehabilitated

- Choose the reason for closing the client's case:
 - Death – VR has documented the participant has passed away.

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- Disability Too Severe/Unable to Benefit – Individual was determined eligible for the VR program; however, the individual’s disability has become too severe to allow him or her to seek competitive integrated employment.
- Does Not Require VR Services – (Ineligible) Individual did not require VR services to prepare for, secure, retain, advance in or regain competitive integrated employment.
- Extended Services Not Available – Individual requires long-term extended services; however, no long-term source of funding is available to begin job development.
- Health/Medical – Individual is hospitalized or receiving medical treatment that is expected to last longer than 90 days and precludes entry into competitive integrated employment or continued participation in the program.
- Individual is Incarcerated – Individual entered a correctional institution (e.g., prison, jail, reformatory, work farm, detention center) or other institution designed for confinement or rehabilitation of criminal offenders.
- No Impairment/Disability Condition – (Ineligible) Individual was found to have no disabling condition, which would require services to prepare for, secure, retain, advance in or regain competitive integrated employment.
- No Impediment to Employment – (Ineligible) Individual was found to have no impediment to employment or did not require VR services to prepare for, secure, retain, advance in or regain competitive integrated employment.
- Other – All other reasons not included anywhere else (this code should be used minimally).
- Refused Services or No Further Services – Individual actively chose not to participate or continue in the VR program. Indicates when an individual’s actions make it impossible to begin or continue a VR program. Example would include repeated failures to keep appointments.
- Reservist called to active duty – Individual is a member of the National Guard or other reserve military unit of the armed forces and is called to active duty for at least 90 days.
- Extended Employment – Individual who received services and was placed in a non-integrated sheltered setting for a public or private non-profit agency or organization that provides compensation in accordance with the Fair Labor Standards Act.

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- Transferred to Another Agency – Individual needs services that are more appropriately obtained elsewhere. Forward appropriate referral information to another agency so that services may be provided more effectively.
- Unable to Locate, Contact or Moved – Individual has relocated or left the state without a forwarding address, or when the individual has not responded to repeated attempts to contact the individual by mail, telephone, text or email.
- Section 511 Participant Refused Services – (Ineligible) Individual applied for VR services pursuant to section 511 of the Rehabilitation Act and was determined ineligible because he or she did not wish to pursue competitive integrated employment.
- Determined Ineligible Following Trial Work Experience – (Ineligible) Following Trial Work Experience, the individual was determined ineligible because he or she was unable to benefit due to the severity of his or her disability.

120.20 Post-Employment Services (PES)

- VR services may be provided after the achievement of an employment outcome (case previously closed Employed - Rehabilitated) in PES when
 - necessary for an client to maintain, regain, or advance in employment; and
 - services requested do not require complex or comprehensive provision of services and are therefore limited in scope and duration; and
 - services requested relate to the original disability on which eligibility was determined; and
 - re-opening the case may unnecessarily jeopardize employment due to order of selection and priority category placement.
- Post-employment services must be provided within 12 months of case closure.
- Post-employment services are intended to ensure that the employment outcome remains consistent with the client's unique strengths, resources, priorities, concerns, abilities, capabilities, interests and informed choice.
- If comprehensive services are required, the disability has become more significant, or a new disabling condition has developed, re-opening the case should be considered. ([See CSG 200 – Re-opening Cases](#))

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- Post-employment services are provided under a PES Plan; therefore, a re-determination of eligibility is not required.
- Procedure:
 - Document informed choice.
 - Discuss financial guidelines, collect required financial documentation and complete VR cost scenario when appropriate.
 - Meet with the client to review and sign the PES Plan including client responsibilities and prepare authorizations, as appropriate. Signatures can be obtained in person, by mail, fax or electronically.
 - Dated when agreed upon post-employment services are necessary and PES Plan signed by client and counselor (case was previously closed Employed).
 - Contact the client by phone or in person immediately after the receipt of services and review progress as indicated on the IPE to ensure client satisfaction with the services provided.
 - When no further services are needed and/or required, close the PES Plan. Close out all outstanding authorizations.

130 SERVICE CATEGORIES

- Assessment
 - Assessment means services provided and activities performed to determine an applicant's eligibility for VR services, to assign an applicant to a priority category of a state VR agency that operates under an order of selection, and/or to determine the nature and scope of VR services to be included in the IPE. Include here trial work experiences and extended evaluation. Assessments to determine eligibility, assignment of a priority category or the nature or scope of services to be included on the IPE include, but are not limited to
 - psychological assessments;
 - audiological evaluations;
 - dental and medical exams; and
 - other assessments of personality, interests, interpersonal skills, intelligence and related functional capacities, educational achievements, work experience, vocational aptitudes, personal and social adjustments, and employment opportunities of the client and the medical, psychiatric, psychological, and other pertinent vocational,

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educational, cultural, social, recreational, and environmental factors that affect the employment and rehabilitation needs of the client.

- Diagnosis and Treatment of Impairments
 - Services related to the diagnosis and treatment of physical and/or mental impairments.
- Vocational Rehabilitation Counseling and Guidance
 - Vocational rehabilitation counseling and guidance includes information and support services to assist a client in exercising informed choice and is distinct from the case management relationship that exists between the counselor and the client during the VR process.
- Training
 - Training services are designed to help the client improve educationally or vocationally or to adjust to the functional limitations of his or her impairment in preparation for the vocational goal. If the client receives more than one type of training, record each type. For those clients not seeking a degree or certificate and attending a course in a college or university, code this type of training under Miscellaneous Training.
 - Graduate College or University Training
 - Full-time or part-time academic training leading to a degree recognized as being beyond a baccalaureate degree, such as a Master of Science, Arts (M.S. or M.A.) or Doctor of Philosophy (Ph.D.) or Doctor of Jurisprudence (J.D.). Such training would be provided by a college or university.
 - Four-Year College or University Training
 - Full-time or part-time academic training leading to a baccalaureate degree, a certificate or other recognized educational credential. Such training may be provided by a four-year college, university or technical college.
 - Junior or Community College Training
 - Full-time or part-time academic training above the high school level leading to an associate degree, a certificate or other recognized educational credential. Such training may be provided by a community college, junior college or technical college.
 - Occupational or Vocational Training

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- Occupational, vocational or job skill training provided by a community college and/or business, vocational/trade or technical school to prepare students for gainful employment in a recognized occupation, not leading to an academic degree or certification. This would include selected courses or programs of study at a community college, four-year college, university, technical college or proprietary schools or programs.
 - On-the-job Training
 - Training in specific job skills by a prospective employer. Generally, the trainee is paid by the prospective employer and will remain in the same or a similar job upon successful completion of training.
 - Apprenticeship Training
 - An apprenticeship program is a work-based employment and training program that combines hands-on, on-the-job work experience in a skilled occupation with related classroom instruction. Structured apprenticeship programs generally have minimum requirements for the duration of on-the-job work experience and classroom instruction, and/or could utilize competency-based elements but should have mechanisms in place to ensure quality and consistency of skills acquisition. Other elements that distinguish apprenticeship programs from other work-based efforts including coop education, on-the-job training, and internships are the following: includes supervision and structured mentoring, provides for wage increases as an apprentice's skills increase, is based on an employer-employee relationship, and provides an industry-recognized certificate of program completion.
 - Basic Academic Remedial or Literacy Training
 - Literacy training or training provided to remediate basic academic skills that are needed to function on the job in the competitive labor market.
 - Job Readiness Training
 - Training provided to prepare a client for the world of work (e.g., appropriate work behaviors, getting to work on time, appropriate dress and grooming, and increasing productivity).
 - Disability-related Skills Training
 - Disability-related augmentative skills training includes, but is not limited to, orientation and mobility, rehabilitation teaching, training in the use of low vision aids, Braille, speech reading, sign language, and cognitive training/retraining.

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- Miscellaneous Training
 - Any training not recorded in one of the other categories listed, including HiSet/HSE (high school equivalency) or high school training leading to a diploma, or courses taken at four-year, junior or community colleges not leading to a certificate or diploma.
- Job Search Assistance
 - Job search activities support and assist a client in searching for an appropriate job. Job search assistance may include help in resume preparation, identifying appropriate job opportunities, developing interview skills and making contacts with companies on behalf of the client.
- Job Placement Assistance
 - Job placement assistance is a referral to a specific job resulting in an interview, whether or not the client obtained the job.
- On-the-job Supports – Short term
 - Support services provided to a client who has been placed in employment in order to stabilize the placement and enhance job retention. Such services include short-term job coaching for persons who do not have a supported employment goal consistent with the employment goal on the IPE.
 - This is coded at closure for ES and ESP services.
- On-the-job Supports – Supported Employment
 - On-going support services and other appropriate services needed to support and maintain a client with a most significant disability in supported employment for a period of time generally not to exceed 24 months. These services, such as job coaching, are for clients who have supported employment and long-term supports identified on the IPEs.
 - This is coded at closure for SE and IPS services.
- Customized Employment Services – Supported Employment
 - Designed to meet the specific abilities of the individual with a most significant disability and the business needs of the employer; carried out through flexible strategies, such as job exploration and job carving. Report at the time the service is provided.
- Transportation

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- Transportation, including adequate training in the use of public transportation vehicles and systems, means travel and related expenses that are necessary to enable an applicant or eligible client to participate in a VR service.
- Maintenance
 - Maintenance means monetary support provided for those expenses such as food, shelter and clothing that are in excess of the normal expenses of the client and that are necessitated by the client's participation in an assessment for determining eligibility and VR needs or while receiving services under an IPE.
- Rehabilitation Technology
 - Rehabilitation technology means the systematic application of technologies, engineering methodologies, or scientific principles to meet the needs of, and address the barriers confronted by, individuals with disabilities in areas that include education, rehabilitation, employment, transportation, independent living, recreation, home and vehicular modification, other assistive devices including but not limited to hearing aids, low vision aids and wheelchairs. Rehabilitation technology includes rehabilitation engineering, assistive technology devices, and assistive technology services.
- Personal Assistance Services
 - Personal Assistance Services are a range of services provided by one or more persons designed to assist a client to perform daily living activities on or off the job that the client would typically perform without assistance if he or she did not have a disability. The services must be designed to increase the client's control in life and ability to perform everyday activities on or off the job. The services must be necessary to the achievement of an employment outcome and may be provided only while the client is receiving other VR services. The services may include training in managing, supervising, and directing personal assistance services.
 - There are three distinct personal assistance services:
 - Reader Services – These services are for clients who cannot read print because of blindness or other disability. Reader services include, in addition to reading aloud, transcription of printed information into Braille or sound recordings if the client requests such transcription. Reader services are generally for clients who are blind or deaf-blind,

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but may also include clients unable to read because of serious neurological disorders, specific learning disabilities or other physical or mental impairments.

- Interpreter Services – These are sign language or oral interpretation services for clients who are deaf or hard of hearing and tactile interpretation services for clients who are deaf-blind. Specially trained clients perform sign language or oral interpretation. Also include real-time captioning services for persons who are deaf or hard of hearing. Do not include language interpretation in this category but in "other services".
 - Personal Attendant Services – These are those personal services that an attendant performs for a client with a disability including, but not limited to bathing, feeding, dressing, providing mobility and transportation, etc. in multiple settings to include home, work and training facilities/school.
- Technical Assistance Services
 - Technical assistance and other consultation services provided to conduct market analyses, to develop business plans, and to provide resources to clients in the pursuit of self-employment, telecommuting and small business operation outcomes.
 - Information and Referral Services
 - Information and referral services are provided to clients who need services from other agencies not available through the VR program.
 - Benefits Counseling
 - Assistance provided to a client who is interested in becoming employed but is uncertain of the impact work income will have on any disability benefits and entitlements being received and/or is not aware of benefits, such as access to healthcare, that might be available to support any work attempt.
 - This typically involves an analysis of a client's current benefits, such as SSDI and SSI, the client's financial situation, and the effect different income levels from work will have on the client's future financial situation. This assistance is intended to provide the client an opportunity to make an informed choice regarding the pursuit of employment. Ongoing assistance may also be provided as the client decides on employment goals, searches for jobs and becomes employed.

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- Other Services
 - Use this category for all other VR services that cannot be recorded elsewhere, for example, occupational licenses, tools and equipment, initial stocks and supplies.