

<b>CSG Client Services Guide</b>	<b>Date Issued</b>  12/9/09	<b>Subject</b>  Transmittal #9	<b>Transmittals</b>
			<b>Section</b>  <b>9998</b>

**The following updates are being made to the online Client Services Guide located at <http://dese.mo.gov/vr/csg.htm>. For those of you who have a paper copy of the guide, please update it accordingly.**

**Revisions/Additions are shown in red as follows:**

## **CHAPTER 3 - ELIGIBILITY**

### **310 SIGNIFICANTLY DISABLED (SD) CLASSIFICATION**

#### ***310.3 SD Classification Form/Procedure***

- The functional capacities selected must be expected to be permanent, ongoing, and seriously limiting with respect to employment.
- **Comments should be made to clarify the endorsement of any functional capacity which is not clearly documented in the case file.**
- ~~Written justification is required for each functional capacity area selected and must include a correlation between the disability/functional limitations and employment. (Functional Capacity Checklist)~~
- Information contained in the eligibility certification, initial interview report of contact, and medical, psychological, or academic records must substantiate how the disability/functional limitations create an impediment to employment.
- Complete SD classification form in association with the Eligibility Certification, mail appropriate eligibility letter, and enter appropriate status move (either 04 or 10) in MoRIS.

## **CHAPTER 5 – VOCATIONAL PLANNING**

### **510 COMPREHENSIVE ASSESSMENT**

#### ***510.2 Assessment and Vocational Planning***

- Prior to IPE development, the counselor will assess the client's vocational goals, intermediate objectives, nature and scope of services and employment outcomes.
- The assessment will include information provided by the client, and information obtained in determining the client's eligibility.

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- The following factors that affect the employment rehabilitation needs of the client should be documented in the casefile:
  - Personality
  - Career interests
  - Interpersonal skills
  - Intelligence and related functional capacities
  - Educational achievements
  - Work experience
  - Vocational aptitudes
  - Personal and social adjustments
  - Employment opportunities
  - Medical
  - Psychiatric/psychological
  - Other pertinent vocational, educational, cultural, social, recreational and environmental factors

### **510.3 Counselor Comprehensive Assessment (CCA)**

- Complete the “Counselor Comprehensive Assessment (CCA)” form in MoRIS, prior to the development of the IPE.

For all probationary counselors a comment is required on why the vocational goal and services are reasonable.

- The comment should consider the following information:
  - Disability(s)
  - Informed choice
  - VR services
  - Justification supporting vocational goal. This may include:
    - Academics/aptitudes
    - Previous education and/or work experience (transferable skills)
    - Results of evaluations/assessments
    - Functional limitations
    - Accommodations or rehabilitation technology services
- ~~Include the following information in Part 1 of the CCA:~~
  - ~~A brief description of the client’s disability and limitations~~
  - ~~The client’s vocational goal and/or justification supporting goal, include~~
    - ~~Academic/aptitude testing~~

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- ~~Previous educational and/or work experience~~
- ~~Results of vocational evaluation/assessment~~
- ~~Documentation that the vocational goal and services are compatible with the client's functional limitations~~
- ~~Accommodations or rehabilitation technology services needed~~
- ~~Include the following information in Part 2 of the CCA:~~
  - ~~Specific VR services to be provided for long and short term vocational planning.~~
- ~~Include the following information in Part 3 of the CCA:~~
  - ~~Explanation of how the services will assist the client in reaching their chosen vocational goal and obtaining a successful employment outcome.~~
  - ~~Include a brief description of why the client needs VR services.~~
- After the CCA and IPE have been approved, complete the Status 12 move in MoRIS.

## CHAPTER 6 - FINANCIAL GUIDELINES

### 600 DETERMINATION OF FINANCIAL NEED

#### 600.9 Cost Worksheet

- The counselor will complete a Cost Worksheet which will demonstrate the costs of the needed rehabilitation services, comparable services available and how they are being utilized, client participation and amount of VR funds to be utilized.
- Part I of the Cost Worksheet is required for services based upon financial need:
  - Annually or if financial circumstances change
  - When the client completes a Financial Application
  - When there are client/parent contributions
  - \*Exemptions from Part I: Clients receiving public assistance or SSI/SSDI.
- Part II of the Cost Worksheet is required:
  - When comparable services are available and will be utilized to meet the cost of services, in whole or part; and/or
  - When there is client/parent financial participation in the cost of services

Note Part II of the Cost Worksheet is not required if the comparable services and client participation section of the IPE document the allocation of such funds.

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## CHAPTER 7 - SERVICE CODES, AUTHORIZATIONS AND BILLING

### 720 BILLING PROCEDURES

#### 720.2.2 Verification and Documentation of Services Provided

- An **authorized original district office signature** verifying receipt of services and documentation, as noted below, **is required** for the following when the bill is submitted for payment:
  - Diagnostic/Evaluation Services – evaluation report
  - Proprietary School Training – progress and attendance report
  - College Training – grade report
  - Other Services – report of contact (RC)
- An **itemized receipt is required** for the following when the bill is submitted for payment:
  - All two and four-year colleges (to include graduate and professional degrees)
  - Books
  - Supplies (except cosmetology kits)
  - Uniforms
- Photocopies of medical records should be billed in accordance with current rates. The # of pages is required when the bill is submitted for payment.
- No sales tax may be billed, unless:
  - the client/provider has already paid sales tax, and has the receipt
  - the bill is for out-of state sales tax

## CHAPTER 14 – TRAINING

### 1400 COLLEGE TRAINING

#### 1400.4 Authorization and Billing

- Funds for college training may be issued through a diagnostic non-IPE authorization or an IPE, in accordance with the fee numbers listed on each college listing sheet located in the VR Fee Schedule.
- For colleges/universities not listed, use the out-of state college/university or the in-state private college/university general fee number and amend the total amount to reflect the nearest tax supported college rate or actual cost of training, whichever is less.

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- ~~• When a college or university (which has a fee number) increases its fees after authorizations have been written, the district office will need to cancel the original authorization and issue a non-diagnostic authorization using the updated fees (mark "yes" to correct an existing IPE) prior to the payment of the bill.~~
- The amount approved for educational costs to all two and four-year colleges (to include graduate and professional degrees) on the Fee Schedule in MoRIS may be authorized. An itemized list is required for billing. Payment cannot exceed actual costs or agency established maximum allowable rates in accordance with cost effective practices.