

Application

Once the VRC takes the application, the following steps will be taken:

- In the CMS, go to the applicant's record
- Convert to Client
- Enter in the required information
- Save
- Go to Program
- +New
- Drop down box – Choose Vocational Rehabilitation
- Once you choose Vocational Rehabilitation, several more fields appear.
- Enter all required information
- Save
- Go to tab Program Note
- +New
 - Note Type: Application
 - Note Date: Date application was signed by the applicant or date stamp received
 - Communication Type
 - Subject: Application
 - Description: Application case note template entered and completed.

The VRC will receive an email with subject line -New Program Has Been Assigned. This is if someone besides the VRC completes the application.

The VRC is to send the application paperwork to the assigned support staff within 5 business days.

Application documents are uploaded into Program Document:

- Go to Program Document
- +New
- Document Type:
 - Client response form
 - Consent form (ROI)

- Eye report
 - Letter generation
 - Supporting documentation
- Name: Name of the document not client (i.e. ROI DMACC 2024, Fall 2024 Transcript)