Case Management System (CMS) User Guide

Client Notes VS Program Notes

Client Notes – these notes will be used <u>only</u> prior to application

Program Notes – these are found in the client's program. All notes pertaining the specific case are entered here. **(including the application case note)**

Referral

Finding Referrals

Notification of referrals assigned to VR Counselor

When a referral is completed, the Vocational Rehabilitation Counselor (VRC) will receive an email with the subject line – New Client Has Been Assigned.

The email will state the referral's name along with a link that will go directly to the client's record.

In the CMS, the first Queue is called Referral Deadline Approaching. In this Queue, it lists the referral's name, date of intake, case manager, support staff, and the 21-day deadline to convert the referral to a client. This will show all referrals (not specific to user or program)

Search referral list by counselor

You can search your referrals specific to VRC by doing the following:

- Go to Search
- Standard Search
- Client
- Check client
- Client equal to Yes/No – choose no
- Case manager – drop down box – choose VRC name
- Search

This will bring a list of the referrals that are assigned to the specific VRC that are required to be contacted (attempt minimum 3 times using different methods of communication – call/text/email/letter) within 14 days.

Closing a referral

Not interested in services:

- After contacting a referral and they state they are no longer interested in pursuing services, the VRC creates a client note with the description of the conversation.
- Go to the client page

- Case manager – empty drop-down box to no case manager

Interested in services:

- Create client note with description of conversation and date/time of meeting set up. The meeting is to be no longer than 21 days from date of referral

Creating referral in CMS

- Go to Intake (+ sign)
- New referral
- Enter in all required information
- Do not convert to client or **enter false SSN**

Application

Entering Application

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

- Complete required documents [VR Forms - IDB Policies and Procedures (blot.im)]
- Convert to Client
- Enter in the required information including adding assigned support staff
- Save

Create Program

- Creating a program starts the 60 days clock for eligibility determination required by RSA
- +New
- Drop down box – Choose Vocational Rehabilitation
- Once you choose Vocational Rehabilitation, several more fields appear.
- Enter all required information
- Save

Enter Program Note: Application Case Note Template New.pdf (blot.im)

- +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 is to send the required application paperwork to the assigned support staff within 5 business days.

Uploading Documents (typically completed by support staff)

- Go to Program Document (formally known as client files) - depending on screen size, it could be under the tab- MORE
- +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)

Eligibility Determination

Required Documentation

The following documentation must be uploaded as a program document prior to submitting the certificate of eligibility (COE) for review.

- Eligibility Aid
- Medical Documentation
- SSA benefits verification, if presumed eligible
- Individual Education Program (IEP)/504 Plan, if in high school

If the client provides medical documentation during the intake meeting, this information must be uploaded as a program document.

If needed, counselors will send ROIs to support staff to send to medical providers. Once medical documentation is received, support staff uploads into the CMS and sends VRC a work request (WR).

- Tracking Inbox
- Work Request
- New
  - Task
  - Priority
  - Assign to
  - Due date
  - Instructions

The VRC receives an email with subject line – Work Request Assigned to you. The email will state there is a WR assigned to you with a direct link to the WR to complete the eligibility.

Completing the Disability Page

Using the assessment (eligibility aid/IEP) completed at the application meeting, complete the Disability page.

- Disability Level Order Date: Date entered/updated
- Disability Priority:
  - Disability Priority auto calculates based on the following requirements:
    - Disability Priority = 1: must have at least 1 selection in 3 different functional areas

        - Disability Priority = 2: must have at least 1 selection in 1 to 2 different functional areas
        - Disability Priority = 0: 0 functional areas
    - Disability Level will calculate as follows based on the Disability Priority:
        - Disability Priority 1 = Most Significantly Disabled
        - Disability Priority 2 = Significant Disability
        - Disability Priority 0 = No Significant Disability

*In order for it to be supported employment, the disability priority must be 1 (MSD)

- VR client can be expected to require multiple VR services over an extended period of time:
    - Yes – individual is eligible for VR services
    - No – individual is not eligible for VR services
- Functional Capacity Areas: Communication, Mobility, Self-Care, Work Skills, Interpersonal Skills, Self Direction, and Work Tolerance
- Counselor Rationale-Reports used for determining eligibility (eye report, IEP, client interview, etc)
- Eye Report:
    - Yes – if eye report uploaded in program documents
    - No – if no eye report is received in the required timeframe or presumed eligible (SSA benefits documentation must be uploaded in program documents)
- Diagnosing Doctor: Name of doctor, credentials, date of report, and facility
    - Required for all determination of eligibilities/ineligibilities
    - If presumed eligible, state documentation used to support (BPQY, SSA award letter based on blindness/visual impairment, etc) and date of the documentation used.
- Diagnosis: Cause of blindness, best corrected visual acuities and/or peripheral field loss, prognosis, etc
    - Required for all determination of eligibilities/ineligibilities
    - Includes secondary diagnosis if supported by medical documentation

- Include self-reported diagnosis stating date of self-report/interview (e.g. self-reported on 5/1/24 during intake meeting, has seasonal depression and anxiety)

Counselor saves the form

Completing the Certificate of Eligibility (COE)

- COE Status: This status updates throughout the eligibility approval process.
- Eligibility Date: Date entered/updated
- Presumptive Eligibility:
  - Yes – if client is receiving SSA benefits and VRC has uploaded benefits documentation in lieu of medical documentation for eligibility.
  - No – when SSA documentation is not used for eligibility.
- Establish Eligibility:
  - Yes – if you are establishing eligibility.
  - No – if you are not establishing eligibility.
- Eligibility:
  - Yes – if determining individual eligible for VR services
  - No – if determining individual ineligible for VR services
- Eligibility Determination Extension: Date eligibility is extended to (not to go over 30 days from the 60-day requirement)
  - Extension form must be uploaded in program documents with program note to support the extension rationale and discussion with client.
- Experiences the following substantial impediments to employment:
  - Summarize each functional capacity area established on the disability screen.
  - Substantial impediment statements examples:
    - Due to John’s disability (blindness), he is not able to access print information (communication) or to navigate independently in his community (mobility) which hinders his ability to prepare for and enter employment because he will not be able to complete training activities, apply for a job, do a job search or travel to a job location.

        - Due to Jane’s disabilities (visual impairment and traumatic brain injury), she is not able to participate in work activities at the same rate as his peers (work skills) which hinders his ability to enter and retain employment because she will not be able to complete tasks expected as required by employers and will need an accommodation and job coach. She is not able to complete work tasks without accommodation and an adaptive work schedule (work tolerance) which will hinder her ability to retain employment.
        - Due to Sam’s disability (blindness), they are not able to complete work tasks without the use of assistive technology (work skills) which hinders their ability to engage in employment because they do not know which assistive technology will be effective and will require training to learn this skill and to use it on the job.
    - Statement Starters
        - Due to client’s disability(s) – can state which disabilities
        - client is not able to - (enter statement related to functional limitation area)
        - which hinders client’s ability to – identify area of employment continuum (prepare, enter, engage, retain, advance) for/in employment
        - because - what is it they can’t do today.
- Resulting from these impediments, the following VR services are required:
    - List VR services required to address substantial impediments to employment and state the reason for the service.
    - Required Services statement examples:
        - Disability related skills training - to learn to travel independently and learn to access transportation so that he can prepare for and enter into employment.

- Disability related skills training – to learn alternative techniques in the workplace to allow him/her to retain their job.
- Rehabilitation Technology – to be able to use assistive technology so that he can complete education/training, apply for jobs and complete a job search.
- Rehabilitation Technology – to be able to assess and select assistive technology that will allow him/her to retain their current position.
- Job Readiness and Job Search Assistance – to be able to prepare for a job, understand disability disclosure and to complete job interviews.
- VR Counseling and Guidance – to assist with adjustment to blindness, identify and select training providers, identify positions that meet his strengths, interests, abilities, and job goals.
- On-the-Job Supports – to be able to stay on task at a job site and to provide additional training needed to learn the job tasks.

- Benefits/Disability Information
- Primary Disability
- Primary Cause/Source
- Secondary Disability – must have supporting documentation
- Secondary Cause/Source
- Additional Disability – must have supporting documentation
- Additional Cause/Source
- Additional Notes
- Send to Supervisor for Review:
- Choose supervisor from the drop-down box.
- Save.

VRC receives an email that the <u>COE is pending review.</u>

Once the supervisor approves the COE, the VRC receives an email that the <u>COE has been approved</u>. The email has a direct link to the client's record.

- Go to the COE page.

VRC is to contact the individual to inform them of the eligibility determination and set up a meeting to complete the Individual Plan for Employment.

Completing the Program Note

- Click on Program Note
- +New
- Complete eligibility case note to include date contacted client, determination shared, and scheduled IPE development meeting.

Generate Eligibility Letter (if eligible)

- In the COE, click on button - Generate Eligibility Letter
- A Program Document will automatically create in new screen
- VRC edit the letter based on the meeting time set up for IPE development discussion.
- Save
- VRC send support staff a work request to send the letter to the client

Generate Closure Letter (if ineligible)

- Follow guidance for closing the case

Individual Plan for Employment

Prior to completing the plan in the CMS, the plan data elements and employment tabs need to be completed first. These are only required at initial IPE.

IMPORTANT: If you complete the plan and assign it to support staff prior to completing the plan data elements and/or employment tab, the plan will be lost

Plan Data Elements tab

- Complete all required sections including: WIOA Program involvement, barriers to employment, education (completed at initial plan), and education (completed at initial plan and updated as needed)
- Save

Employment tab

- Complete employment at initial plan – if none, enter NA for employer name and job title
- Save

Completing the IPE

Complete all required information:

Program Plan

- Plan Status: This changes as the IPE goes through the approval process
  - Draft – the initial entering of the plan
  - Draft Pending Review – the plan is waiting to be reviewed by support staff
  - Draft Pending Approval – the plan is waiting to be approved by supervisor
  - Draft Requires Revisions – the plan is waiting for counselor to make changes
  - Draft Approved – the plan is waiting to be sent/signed by client
  - Final – the plan is approved, signed, and sent. Services and authorizations are now available

- Plan Edition: the number of plan amendments for this case
- Employment goal and job title can be the same name - make sure spelled correctly
- Additional Goals:
    - High School / Secondary Education Graduation Goal – if yes, checkmark
    - Supported Employment Goal – if yes, checkmark
- Service Start Date: The date of the plan developed
- Goal Completion Date: The date of the plan expiring
- SOC: Enter the SOC code for the goal identified
- Signature Date: Date of the client response form

Responsibility and Resources

- Responsibility
    - This can be left blank, if so, then complete the client responsibilities as the criteria for review.
    - If you choose one of the drop-down boxes, client responsibilities will auto populate depending on what you choose and you will need to edit it to reflect all of the criteria for review.
        - Review date – should be no longer than one year
        - Services – choose all services agreed upon with the service dates and provider.
        - Send to support staff for review

      *If you forget to complete the Plan Data Elements tab and Employment tab, you can navigate to the Quick Menu and complete them there then you won't lose your plan.

        - Sign the plan – you will have to navigate back to the bottom of the page and find the pencil icon.
        - Complete the IPE case note in program notes - IPE amendment case note template
- Client Responsibilities: Formally known as criteria for review
- Staff Responsibilities: Examples include:
- Community and Financial Resources: Examples include - Waiver funding, FAFSA, scholarships, medical insurance, etc.

Plan Review Details

- Review Scheduled Date:
- Date Last Reviewed:
- Post Employment Services Needed:
    - Yes – if you and client determined post-employment services are needed
    - No – if you and client determined post-employment services are not needed
- Supported Employment Follow-along Services Needed?
    - Yes – if you and client determined supported employment follow-along services are needed
    - No – if you and client determined supported employment follow-along services are not needed
- Have VR Goals, Objectives, and Services been coordinated with the student's Individualized Education Program (IEP)?
    - Yes – if you coordinated with IEP to develop plan for employment (should be yes if a high school student)
    - No – if you did not use IEP (or person is not on an IEP) to develop plan for employment.

Service Categories

- Select all service categories decided upon during plan development
- Service start date – date the service begins
- Service end date – date the service ends
- Provider – specific provider for each service
    - If the provider is not decided upon such as college, do not put this service on the plan until it is decided, then amend the plan

Comments

Plan Comments: If amending the plan, add date and brief reason for amendment.

IPE Approval Steps

- Support staff review plan and sign it
- Support staff send to supervisor for approval

- Supervisor reviews the plan and signs it
- Supervisor sends back to support staff to send plan
- Once the client response form is received, support staff or VRC put the date in the field Client Signature Received
- VRC receives an email Plan is Final -Currently not happening
- There is a direct link to the client's plan in the email
- SS go to plan and navigate to the bottom of the plan
- Generate Plan Cover Letter
- A program document opens for SS to name the document, edit the letter, and save it (VRC can request edits made to the letter through work request)
- Support staff sends out letter and marks the plan sent

IPE Returned for Revisions

A supervisor may return an IPE or amendment for revisions. There are two places to find the supervisor's comments for revisions. Follow one of these series of steps to see what revisions need to be made:

1. On the Plan
   a. Go to client program
   b. Click on plan
   c. Review/approval section
   d. Supervisor Comments
2. In Events of the Plan
   a. Go to client program
   b. Click on plan
   c. Choose the tab "event" within the plan
   d. Find "returned for revisions"
   e. Comments

Plan Data Elements

Plan Data Elements must be completed at initial IPE and updated throughout the life of the case. The following information is tracked in this screen:

- WIOA Program Involvement
- Barrier to Employment (Completed at Initial Plan only)
- Education (Completed at Initial Plan only)
- Education (Complete at Initial Plan and Updated as Needed)
- Vocational/Technical Credential, Licenses, Certificate, or Certification
- Other Education or Training
- Date of Most Recent Measurable Skill Gain

WIOA Program Involvement (Throughout the Life of the Case)

Choose the appropriate drop-down box for each program. If unknown, choose "Co-enrollment information unknown".

- Adult (Title 1 of WIOA)
- Adult Education (Title 2 of WIOA)
- Dislocated Worker (Title 1 of WIOA)
- Job Corps
- Vocational Rehabilitation (Title 4 of WIOA)
- Wagner Peyer Employment Services (Title 3 of WIOA)
- Youth (Title 1 of WIOA)
- YouthBuild

Barrier to Employment (Completed at Initial Plan only)

Choose the appropriate drop-down box for each barrier. If unknown, choose "Barrier to Employment Information unknown". Definitions: [WIOA Barrier to Employment Definitions.docx]

- Long Term Unemployment
- Exhausting TANF Within 2 Years
- Foster Care Youth
- Homeless Individual, Homeless Children and Youths, or Runaway Youth
- Ex-Offender
- Low Income
- English Language Learner
- Basic Skills Deficient

- Cultural Barrier
- Single Parent
- Displaced Homemaker
- Migrant and Seasonal Farmworker

Education (Completed at Initial Plan Only)

This is automatically populated for you.

Education (Complete at Initial Plan and Update as Needed)

Enrollment and disenrollment of education programs leading to a credential and credential attainment is recorded in this section.
Once you enroll an individual into a program, the individual stays enrolled through the life of the case.

- Enrolled in Secondary Education Leading to Recognized Secondary Credential
    - If enrolled in high school at grade level 9^{th} or higher
- Enrolled in Secondary School Equivalency Program Leading to Recognized Secondary Credential
    - If enrolled in HiSET program
- Enrolled in Postsecondary or Graduate Education
    - Update each year the student advances to the next level of post-secondary education
    - 1- First year
    - 2-Second year
    - 3-Thirds year
    - 4-Fourth year
    - 5-Graduate program
- Enrolled in State Adult Secondary School at ASE Level
- Enrolled in Postsecondary Education or Career or Technical Training Leading to Recognized Postsecondary Credential
    - 0 - Individual was not enrolled in a postsecondary education, career, or technical training program that leads to a recognized postsecondary credential
    - 1 - Individual was enrolled in a postsecondary education program that leads to a credential or degree from an accredited institution or program

    - 2 - Individual was enrolled in a career or technical training program that leads to a recognized postsecondary credential
- Date Enrolled During Program Participation in an Education or Training Program Leading to a Recognized Credential or Employment
    - Date the individual started the program (e.g. start of first semester or date of IPE if already a student when plan is developed)
- Date Attained Secondary School Diploma during Program Participation
    - Date of graduation (date on diploma or end of semester)
- Date Attained Recognized Secondary School Equivalency during Program Participation
    - Date earned HiSET (date on diploma or end of semester)
- Date Attained Associate's Degree
    - Date of graduation (date on diploma or end of semester)
- Date Attained Master's Degree
    - Date of graduation (date on diploma or end of semester)
- Date Attained Graduate Degree (e.g., Ph.D., Ed.D., J.D., M.D.)
    - Date of graduation (date on diploma or end of semester)

Vocational/Technical Credential, Licenses, Certificate, or Certification

- Enrolled in a Career or Technical Training Program, Not Leading to a Recognized Postsecondary Credential
- Enrolled in a Career or Technical Training Program, Leading to a Recognized Postsecondary Credential
- Date Attained Vocational/Technical License
- Date Attained Vocational/Technical Certificate

Other Education or Training

- Date Attained Other Recognized Credential

Date of Most Recent Measurable Skill Gain (MSG)

The most recent MSG date is recorded in this section. When a student earns another MSG, replace the date with the most current MSG date. (e.g. a college student earns 12 credit hours May, 2023, enter 05/15/2023. The student then earns another 12 credit hours December, 2023, replace the 05/15/2023 with

12/15/2023 and save.

Measurable Skill Gains Guide for State VR Agencies (blot.im) (this link explains what counts for each of the following MSG)

- Measurable Skill Gains: Educational Functioning Level (EFL)
- Measurable Skill Gains: Secondary Diploma or Equivalency
- Measurable Skill Gains: Secondary or Postsecondary Transcript/Report Card
- Measurable Skill Gains: Training Milestone
- Measurable Skill Gains: Skills Progression

VR Service Verified

Once the individual plan for employment is approved and finalized, the status can now be moved to VR Services.

- Go to Program
- Program Notes
- IPE developed case note
    - Note Type: Services Verified
    - Search Service Category: Choose service provided (typically VR guidance and counseling)
    - Service Date: Date of IPE
    - Service Provided By: Service was provided in whole or part by agency staff
    - Check box: Use For Initial Service Start Date
    - Save

You will receive a workflow message to complete the event page.

- Go to Program
- Event
- New
    - Event Category: VR Services
    - Event: VR Receiving Services
    - Date: (will auto populate from case note)
    - Comments: Start VR Services
    - Save

IPE Amendment

- Need to do case note first for service verified IPE amendment case note template
- If service verified case note is not done prior to amendment, a general note will need to be done and updated to service verified once amendment is approved

Completing the Amendment

- Do not change the plan date (this remains the same over the life of the case
- Amend the plan as needed
- Comments – enter date and reason for amendment each time an amendment. Example: 06/26/2024 – plan amended to add maintenance in order to attend SELF week.
- Signature date – update with the client response form date or leave blank (delete old date) if no client response form is uploaded yet.

Pre-ets Service

Pre-ets services are no longer called pre-ets in this CMS. They are called:

1. Instruction in Self-Advocacy (VR)
2. Job Exploration Counseling (VR)
3. Work Based Learning Experience (VR)
4. Workplace Readiness Training (VR)
5. Counseling on Enrollment Opportunities (VR)

Authorizations

Authorizations require 2 case notes. The first note is completed prior to the service and the second note is done after the service is provided/purchased.

1. The Prior to Services note can be done as either an authorization type or a service verified type.
    a. The authorization type case note would be used if you did not talk to the client (i.e., you are seeing a client next week and need to authorize for a sign language interpreter).
    b. The service verified note type would be used when documenting services, you provided to the client and also writing an authorization for a future service (i.e., you provided guidance and counseling, or skills training and you are authorizing for a sign language interpreter for your next meeting).
2. The After Services note is a service verified note type. This note is written after receiving documentation/report/invoice.

Case Note before Service/Equipment is Purchased:

The below are steps for a service verified note type. If using authorization note type, some of the fields will not be available (i.e., service categories)

- Once you are in the client's program, go to program note
    - +New
    - Note type – services verified or authorization
    - Note date: date note being entered
    - Services - Check services you provided – (i.e. VR counseling and guidance)
        - **do not choose service provided by vendor**
    - Service date: date service is being provided
    - Service provided by drop down box
        - Service was provided in whole or part of agency staff
    - Communication type
    - Subject – Authorization
    - Description – enter in all required information

Authorization:

Pre-Plan

VR counselors use pre-plan authorizations for services allowed to complete an application and determine eligibility (interpreter, transportation, assessment, etc).

- Go to client program
- Click on tab - authorization (if the screen is too large, it may be under MORE)
- +New authorization
  - Authorization screen opens
  - Complete the required fields
    - Program Type – Drop down box
      - Choose Vocational Rehabilitation
    - Search Service Category
    - Choose service being authorized
    - Click done
    - Search for provider by typing in at least 2 characters
    - Hit enter and choose the provider from the list
    - Provider address - Drop down box
    - Authorized start and end date
    - Authorized amount
    - Federal Fiscal Year
      - 2024
    - Budget Type – Drop down box
      - 110 VR Case Services
      - 6B Supported Employment
    - Budget – Drop down box
      - VR-00011
      - Pre-ets-00010
    - Service Notes – do not use
    - Description – specific information about the authorization. Examples include:
      - Number of hours of job coaching and rate
      - Name of books authorizing
      - Type of assessment
      - If a support service – identify service category it supports. (i.e., transportation to support college training, transportation to support pre-ets work-

place readiness training, maintenance to support disability related skills training, other services/language interpreter to support disability related skills training)

- Click Save
- The page will refresh and additional fields appear
  - Workflow Actions
    - Send for review/approval
    - Authorization canceled
  - Once send for review/approval is selected, another field appears – Drop down box of supervisor names
  - Select supervisor
  - Leave authorization sent field blank
  - Navigate to the bottom and click save
  - Enter password

In Plan

Once the plan is developed, this is the only way to complete an authorization. The services available to authorize are tied to the services on the plan.

- In the client's program, go to tab – plan
  - Navigate to the bottom of the page
  - Click button named Create New Authorization
  - Authorization screen opens
  - Complete the required fields
    - **(same process as described in pre-plan)**

Client Reimbursement Authorization – same process as above except:

- Provider: Client Reimbursement

Case Note after Authorized Service is Provided:

- Once the report/invoice is received, a program note must be completed. (this may be in the form of an "ok to pay" request from accounting)
  - Note Type: Services Verified
  - Note Date: Date note is being entered

- Search Service Category: Choose service **provided by the vendor** (i.e. college, rehab technology, etc)
- Service Date: Date service was provided (i.e., specific meeting) or date of report if invoice covers a period of time (i.e. college training invoice received in middle of semester)
- Service Provided by: Service was provided in whole in part through purchase by the agency
- Provider: Type in at least 2 characters of the provider's name and a list of providers will populate for you to choose from
- Subject: Service provided by
- Description: Describe how the service provided was verified - examples:
    - Report was provided for job coaching provided by Goodwill from 04/02/2024-04/30/24.
    - Invoice was received from Interpreter Services Agency for a meeting.

Once Approved

External Authorizations

- Once approved, support staff sends the authorization to the provider (vendor).
- Support staff enters date sent in authorization screen.

Internal Authorizations

- Once approved, support staff prints authorization as a PDF and emails to the accounting email.
- Accounting pulls the requested item and notifies the counselor that it is ready for pick up.
- Counselor coordinates how to retrieve the items for the client.

Workflow Terminology:

- Draft - Draft Authorization Created
- Draft Pending Review/Approval - Submitted for Review/Approval
- Issued - Draft Authorization Approved
- Canceled-Authorization Canceled

- Closed-Authorization Closed (paid) – only accounting staff use this option after service/equipment is paid.

Measurable Skill Gain (MSG) and Credential

All individuals working towards a credential must be enrolled into a recognized program in order to earn an MSG.

Reference Guides for MSG and Credentials

- Credential Attainment Guide
- Measurable Skill Gains Guide

Enrolling into Recognized Program and Documenting Credential

- Client
- Program
- Plan Data Elements
    - Education (Complete at Initial Plan and Update as Needed)
        - Enrollment - date of IPE if the applicant is enrolled in program when applying for VR services
        - Attainment – date the credential was earned (not the date the documentation was provided)
    - Vocational/Technical Credential, License, Certificate, or Certification
        - Enrollment - date of IPE if the applicant is enrolled in program when applying for VR services
        - Attainment – date the credential was earned (not the date the documentation was provided)
    - Other Education or Training – enrollment and credentials not listed above are entered in this section

Documenting an MSG

- Client
- Program
- Plan Data Elements
    - Date of Most Recent Measurable Skill Gain (MSG) - the five MSGs are listed here. The field date will not be available if the individual is not enrolled in program listed above. The dates are typed over as additional MSGs are obtained. For example, if a student earns

12 credit hours in May 2024, an MSG date is documented. In December 2024, the student earns another 12 credit hours, an updated date replaces the current date.

Work Request

Work request are internal messages to colleagues. There are two types of work request available.

Client Specific

Client specific work request is found within the program of the client. This will tie the client's name to the work request.

- Click on the tab Work Request
- +New
- Task – drop down box
  - Authorization to Send: Use when requesting support staff to send authorization. This work request is automatically done when an authorization is approved.
  - General Task: Use when requesting any other task to be completed by any colleague/supervisor
  - PE Closure: Use when requesting a potentially eligible client to be closed.
- Priority – drop down box
  - Low
  - Medium
  - High
- Assigned to – drop down box
  - Choose employee name to assign task
- Due Date – auto populates to ten days out but can be edited
- Instructions – text box
  - Describe specific instructions of what needs to be completed. Examples: Send attempt to contact letter found in program documents. Send ROI to client for college, found in program documents
- File – upload any files here for the purpose of the work request

General Work Request

General work request is found in the tracking inbox of the counselor's homepage. Creating a new work request here is the same process, however there is no client name tied to the request.

Employment

There are three stages of employment. All 3 require the same information

IX.C Employment at Initial Plan: Completed at Initial Plan only

XVI Employment Outcome: Completed as the client becomes employed throughout the life of the case

XVII.D Employment at Exit: Completed only at time of exit – must be done prior to exit screen

- Employment Stage: Auto populates to Employment at Initial Plan
- Employment Status – drop down box
- Employer Name – If not employed, enter NA or None
- SOC – only available if employment is chosen above
- Job Title – if not employed, enter NA or None
- Start Date - only available if employment is chosen above
- Hourly Wage and Hours per Week – only available if employment is chosen above

Event

Events in this system are what we know as statuses:

Automatic Events - These events are automatically completed as the events are done in the CMS:

- VR Applicant (02)
- VR Eligible (10)
- VR Plan (12)
- VR Closed (26/28/30)

Manual Events - These events must be created by the counselor manually in the CMS:

- VR Services (18)
- VR Ready for Employment (20)
- VR Employed (22)

Closures (Exit Screen)

Ineligible (08)/Not Rehabilitated (28/30)

- Exit Status – defaulted to Draft until ready to make final
- Event – drop down box – choose one:
  - VR exited before eligibility – Ineligible (08)
  - VR exited Not Rehabilitated – Not Rehabilitated (28)
  - VR exited from Eligibility or Plan – Not Rehabilitated (30)
- Date of Exit – Date exiting from program
- Type of Exit – Drop down box (see link for reference) Closure Type Definitions
- Reason for Exit – Drop down box (see link for reference) Reason for Closure
- Consultation: Select the activities completed with the client (only some will apply for one that is ineligible)
- Rationale for any Consultation items not completed: Type in reasons for those listed above were not completed.
- Rationale for Ineligibility or Case Exit: Type brief reason as to why not eligible for IDB VR services (more to come here)
- Monthly Public Support at Exit – Select all that apply
- Medical Insurance Coverage at Exit – Select all that apply
- Primary Source of Support at Exit – Drop down box – choose one

Rehabilitated (26)

STOP – Employment screen must be updated prior to exit screen

- Exit Status – defaulted to Draft until ready to make final
- Event – VR exited Rehabilitated
- Date of Exit – Date exiting from program
- Type of Exit – Drop down box (see link for reference) Closure Type Definitions

- Reason for Exit – Drop down box (see link for reference) Reason for Closure
- Consultation: Select the activities completed with the client
- Rationale for any Consultation items not completed: Type in reasons for those listed above were not completed.
- Compatibility: Select all that apply for successful closure compatibility
- Rationale for any Compatibility items not completed
- Significant Services provided contributing to the Employment Outcome
- Benefits Package Available – yes or no
- Monthly Public Support at Exit – Select all that apply
- Medical Insurance Coverage at Exit – Select all that apply
- Primary Source of Support at Exit – Drop down box – choose one

Program Note

- Closure 26 Case Note Template
- Closure 28 Case Note Template

Closure Letter

- Program Documents
- Letter Generation
- Edit Letter (as needed)
- Save

Send Work Request to Lynnette

Move from Draft to Final

CMS Searches

Search

Searches can be done for the following:

- Authorization – used to look up authorizations when asking for clarification/okay for payment
- Budget – would not be used outside of accounting
- Client – used to search for clients/referrals
- Office – would not be used as there is only one office
- Provider – used to look up vendor's name, contact person, services available to be purchased
- Work Request – this would search all work request (not counselor/teacher specific)

Helpful Hints

- When searching, there are drop down boxes with an option to change from 'Equal To' to Not Equal To, Like, Not Like, Starts With, Ends With. This can be helpful when searching for things like:
    - Authorization numbers – Example:
        - Searching authorization number Auth-2024-32742
        - Search by Authorization/Authorization Number/Ends with/32742
    - Client name – Example:
        - Searching client with name Wayne Gretzky but unsure of how to spell last name
        - Search by Client/Last Name/Ends With/Gret
- Clients can be searched by a variety of filters. Most commonly used are:
    - First Name
    - Last Name
    - Case Manager
- You can narrow down searches with numerous filters - Example:
    - Client
        - First Name-Jamie

  - Last Name – Ends with Phip
  - Case Manager – Sarah Baebler

Status Search by Counselor:

- Search
- Standard Search
- Check Client
- Check Case Manager
- Drop Down Box - Choose Counselor
- Check Program
- Filter Status
- Drop Down Box: Choose either: VR applicant (02), VR eligible (10), VR plan (12), VR employment (22), and VR closed (26/28/30)