

Quick Guide: Moving clients in and out of employment (details of screens can be found in the CMS User Guide)

VR Services to Ready for Employment (18-20)

When to use: My client does not need any services, but they are not employed yet.

- Event Tab
 - New
 - Event Category: VR Services
 - Event: Ready for Employment
 - Save

VR Services to Employment (18-20-22)

When to use: My client is now employed, and no services are longer needed (starts the 90 day clock).

- Employment Tab
 - Employment Outcome and enter in all information (make sure SOC code and employment goal matches IPE)
- Event Tab- need to enter in two new events (if not already in Ready for Employment)
 - New
 - Event Category: VR Services
 - Event: Ready for Employment
 - Save
 - New
 - Event Category: VR Employment
 - Event: VR Employment
 - Save

VR Employment to Ready for Employment (22-20)

When to use: My client is no longer employed, does not need services, and are looking for employment.

- Event Tab – need to delete two tabs
 - Event: VR Employment
 - Click on VR Employment– VR Employment
 - Hit delete
 - Are you sure you want to delete – yes

VR Employment to VR Services (22-18)

When to use: My client is no longer employed and does require services before being ready for employment.

- Event Tab – need to delete two tabs
 1. Ready for Employment
 - Click on VR Services – Ready for Employment
 - Hit delete
 - Are you sure you want to delete – yes
 2. VR Employment
 - Click on VR Employment– VR Employment
 - Hit delete
 - Are you sure you want to delete – yes

Program Note for All Status Changes:

- Subject line: Brief description of what status is being changed
- Description: Explanation of reason for changing status
- Save

Quick Guide: Closing Clients in 26 or 28 (details of screens can be found in the CMS User Guide)

Moving from Employment to Rehabilitation (22-26)

When to use: My client has been in employment for at least 90 days, employment is stable, and their plan is current/matches employment.

***For all migrated cases, you must contact the administrator (Wes) and request the employment at exit be added to the employment tab so closure can be done. Be sure to send Wes the UID or VR Program Number when you send the request. Once that is done, complete the following steps:**

- Exit Tab (leave in draft status)
 - Complete exit screen and save as draft
- Employment tab
 - Enter in all employment information in employment at exit screen
- Go back to Exit tab
 - Exit Status: change to final from draft
 - Save

Moving from VR Services/VR Employment to Not Rehabilitation (18/22-28)

When to use: My client is not employed and no longer wants case open.

- Exit Tab (leave in draft status)
 - Complete exit screen and save as draft
 - Ensure all information is correct
 - Move to final
 - Save

Final steps for all closures

- Program Document tab
 - Letter generation – choose appropriate letter
 - Name letter – closure letter
 - Review letter template and edit as you wish

- Save
- Work Request to send letter
 - New
 - General Task
 - **All closures letters get assigned to Lynnette**
 - Save
- Program Note
 - Enter in closure case note template and complete