

INSTRUCTIONS FOR COMPLETION IN IRSS AND PROCESSING OF RSA OFFICIAL REPORTING REQUIREMENTS

PURPOSE

IRSS (Iowa Rehabilitation Services System) is a comprehensive, standardized system for reporting on the complete rehabilitation process for every individual who becomes a job candidate of the agency. It begins at application and continues until final closure.

IRSS is designed to accumulate basic information about each individual in the rehabilitation process, and will be used as a reporting tool:

- (1) for measuring the effectiveness of the rehabilitation program at national and state levels;
- (2) to describe the operations of the program to the Congress and to state legislatures;
- (3) in estimating the cost and evaluating the effectiveness of the program to various public and private organizations interested in the vocational rehabilitation of individuals with disabilities;
- (4) to provide specific answers to questions that are frequently raised on operations of the program; and
- (5) to give the counselor a quick and valuable overview of each job candidate's present placement in the rehabilitation process.

IRSS includes all of the required federal items, as well as a number of additional items useful to Iowa Vocational Rehabilitation Services.

QUALITY OF RECORDED DATA

It would be difficult to conduct a program for improving vocational rehabilitation services or to measure the effectiveness of the program without the data contained in IRSS. Evaluation of the data, however, can only be valid if the recording and reporting is accurate and reliable. It is essential, therefore, that each staff member take utmost care in maintaining accurate and complete data in case records of IRSS to ensure the integrity of the official reporting requirements.

DESIGN OF THE SERVICE RECORD IN IRSS

IRSS has been made as nearly self-coding as possible. IRSS is designed to be user friendly in that it converts data entered in the fields to the codes required for RSA reporting; eliminating the need for staff to know the numerical codes.

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GENERAL INSTRUCTIONS FOR COMPLETION OF THE SERVICE RECORD

1. The accurate completion of the items in each job candidate service record is the combined responsibility of the rehabilitation team. The counselor is responsible for obtaining and providing the accurate information from intake through closure to provide the complete picture of the service record.
2. To launch IRSS, open an Internet browser, type IRSS in the address field and press the enter key. This brings up the IRSS Home Page. The case records are contained in the Case Management section of IRSS. RSB staff will work primarily in this section of IRSS. To navigate to the Case Management section, click on the Case Management tab.
 - IRSS Browsers – Users should have only one browser opened in IRSS at a time. Working in multiple browsers may cause data corruption.
 - Errors – Edits have been built throughout IRSS. If the data entered does not meet edit requirements the user will receive a pop-up message. In those instances the user should correct the data causing the error message. (NOTE: Lack of error messages does not necessarily mean that the data is accurate. It simply means that the entries fall within acceptable ranges. Care must be taken to ensure accuracy.)
 - Sign Off – Once a user is done inputting data or looking up job candidate information, IRSS can be closed by closing the Internet browser window.
3. Counselors cannot access cases outside their area office. Supervisors, Rehabilitation Associates, Rehabilitation Assistants and clerical support roles can see all cases in IRSS.
4. Case transfers can be accomplished using the Case Tools page or the Case Transfers page. Only those with a Secretary II or Supervisor role in IRSS can use the Case Transfers page to transfer multiple cases at one time. Cases transferred within an Area Office need only have a new case owner assigned. On transfers outside the Area Office, the sending office will complete the transfer to the new Area Office and then the receiving office will make the new case owner assignment. Cases transferred outside an Area Office will be automatically assigned to the staff person with the Secretary II role in IRSS upon transfer.
5. Work delegated by the counselor to an associate, assistant or clerical person to complete may be delegated by the counselor completing either the IPE form or a routing slip dictating precisely what work is to be completed and by when. Clerical support will check to make sure the change is in accordance with IVRS policies and procedures.

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6. Corrections are allowed when it is determined that the original entry was made incorrectly and in specified instances when the job candidate's situation has changed. In these instances, the Area Office Supervisor should send an e-mail to IRSS Support directing them to make the correction to the IRSS database.
7. To record narrative information accurately in the computer record, all narrative items should be kept as short as possible, consistent with clarity.
8. Data entered in IRSS should be entered using upper and lower case. When reopening a case record from a previously closed case, if some data carried forward is in all capitals, retype the data to include upper and lower case letters. This will assure that data pulled from IRSS to use for mailings to job candidates will appear clean and professional in the merged document.
9. The Case History page may be printed to use as a cover sheet in the job candidate's case file.

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Iowa
**Vocational
Rehabilitation**
Services

IRSS OFFICIAL REPORTING REQUIREMENTS**INSTRUCTIONS FOR COMPLETION**

Look up the job candidate by both name and Social Security number. While the name a person goes by may change, the Social Security number should remain the same. When performing each of the searches, click on the checkbox to Search for Applications. If either of the searches produces a case in the search results grid, click the Create Application button to open a new case. If there is no result, click Open New Application button.

APPLICATON FORM**Select Office Assigned To**

Select the appropriate office from the drop down menú.

First Name, Middle/Maiden Name (or initial), Last Name

Enter the job candidate's first name; full middle name or initial, if available, and/or maiden name and last name. This is not necessarily the name the individual goes by. For example, Richard Smith may be known as Rick, Ricky, or Dick Smith. For purposes of this form and the casefile, he should be listed as Richard Smith. Consistently entering it this way will assist in the future to determine if an applicant has been a previous job candidate. The minimum required is first name and last name.

If the job candidate's last name changes while the case is active, the former last name is entered into the middle name field in parentheses after the middle name/initial. The new last name is entered in the Last Name field.

Preferred Name

Enter the name the job candidate prefers to use. For the example above, enter Rick, Ricky or Dick in this field.

Social Security Number

Enter the job candidate's social security number, if provided, in the three fields. When a SSN is not available or if the individual prefers not to provide his/her SSN, leave blank.

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Job candidate gave permission on the Rights and Responsibilities to exchange information with SSA

From the drop-down menu, select “yes” or “no” to indicate job candidate’s response to the question on the IPE-1 or a subsequent IPE form giving permission to share data with the Social Security Administration through electronic data exchange. Although a job candidate is not required to give IVRS permission to share information through the electronic data exchange, the job candidate should be advised that if IVRS is not allowed to share this information it would require a different process for eligibility and subsequent delays in an eligibility decision. This would impact only those job candidates receiving SSA benefits. Job candidates who receive SSA benefits after application and while in service should be informed that the reason for the release of exchange is so IVRS can be reimbursed by SSA for all expenditures should they obtain employment.

Date of Birth

Enter the eight-digit date or use the calendar option to select the correct date.

Address

Enter the current permanent mailing address of the job candidate including numbers such a building, unit, lot, apartment, etc. Update IRSS as changes occur.

State

Select the state from the drop down menu. Update IRSS as changes occur.

City

Enter the name of the city where the job candidate is currently living. If IRSS doesn’t recognize the city, contact the U.S. Postal Service to verify prior to contacting the IRSS Help Desk. Update IRSS as changes occur.

Zip Code

Enter the nine-digit Zip Code for the job candidate’s address. If the last four digits are not known, just enter the first five. For non-U.S. addresses, enter 00000-0000. Update IRSS as changes occur.

County

Select the county from the drop down menu. If the job candidate’s residence is out of state, select Out of State. Update IRSS as changes occur.

Home Phone

Enter the job candidate’s home telephone number, including phone extension if applicable. Check the TTY and/or VP (Video Phone) checkboxes, if applicable. If the job candidate has no home telephone or the number is unknown, leave blank. Update IRSS as changes occur.

Cell Phone

Enter the job candidate’s cell phone number. If the job candidate has no cell phone or the number is unknown, leave blank. Update IRSS as changes occur.

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Primary E-mail

Enter the job candidate's primary e-mail address. Assure that the e-mail is properly formatted. E-mail addresses must include an @ sign, should not include spaces and should include a domain (eg. Hotmail.com, gmail.com). If the job candidate has no e-mail address or the e-mail address is unknown, leave blank. Update IRSS as changes occur.

Secondary E-mail

In some cases, the job candidate may have more than one e-mail address. For example, a job candidate attending a post-secondary institution may have a private e-mail address as well as a school e-mail address. In these cases, check with the job candidate to determine which e-mail should be listed as the primary address and which should be listed as the secondary address and enter each in the appropriate e-mail field. Update IRSS as changes occur.

Contact Notes

This field is intended for staff use to capture information and/or directions that will be helpful when contacting the job candidate. Staff may use the field to capture the best time of day the job candidate wishes to be contacted or other pertinent contact information.

Sex

Select the appropriate code from the drop-down list.

Marital Status

From the drop-down menu, select the appropriate code to indicate the job candidate's marital status at the time of application for services.

- Married, including common-law
- Widowed
- Divorced
- Separated
- Never Married

Living Arrangement

From the drop-down menu, select the code that best represents the living arrangements of the individual, either temporarily or permanently, on the date of application to the State VR agency.

- Private Residence (independent, or with family or other person)
- Community Residential/Group Home
- Rehabilitation Facility
- Mental Health Facility
- Nursing Home
- Adult Correctional Facility
- Halfway House
- Substance Abuse Treatment Center
- Homeless/Shelter
- Other

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Do you have a legal guardian?

From the drop-down menu, select “yes” or “no” to indicate whether the job candidate has a legal guardian.

Legal Guardian’s Name

If known, enter the name of the job candidate’s legal guardian.

Legal Guardian’s Contact Info

Enter contact information for the job candidate’s legal guardian. Contact information may include a telephone number, cell phone number, mailing address and/or e-mail address.

Race

RSA continues to require self-identification to the greatest extent possible. It is generally expected that the information recorded will reflect the individual’s own identification of race from the categories provided. However, if a job candidate refuses to identify his/her race, the counselor should, at a minimum, notify the individual that if he/she fails to self-identify, an observer-identification method will be used. The counselor or interviewer would then provide the best assessment of the job candidate’s race.

From the drop-down menus for each race category, select Yes or No. At least one of the race categories must be coded as Yes, but multiple Yes answers are permitted.

White

An individual having origins in any of the original peoples of Europe, the Middle East or North Africa.

Native Hawaiian or Other Pacific Islander

An individual having origins in any of the original peoples of Hawaii, Guam, Samoa, or other Pacific Islands.

Asian

An individual having origins in any of the original peoples of the Far East, Southeast Asia, or the Indian subcontinent, including for example, Cambodia, China, India, Japan, Korea, Malaysia, Pakistan, the Philippine Islands, Thailand, and Vietnam.

American Indian or Alaska Native

An individual having origins in any of the original peoples of North and South America (including Central America), and who maintains a tribal affiliation or community attachment.

Black or African American

An individual having origins in any of the Black racial groups of Africa.

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Ethnicity

Hispanic or Latino

An individual of Cuban, Mexican, Puerto Rican, South or Central American, or other Spanish culture or origin, regardless of race.

The ethnic category Hispanic or Latino should be recorded for all job candidates. From the drop-down, select Yes or No.

If the job candidate self-identifies as Hispanic, but refuses or is unable to identify one or more race categories in addition, then code the job candidate as Hispanic for ethnicity and follow the observer-identification method as described above for the race categories. Notify the job candidate that if he/she fails to identify, then an observer-identification method will be used. Individuals who identify as Hispanic may belong to any race group.

Who referred you to IVRS?

Enter the name of the individual who referred the job candidate. If unknown, leave blank.

Type of Source

Indicate the individual, agency, or other entity that first referred the job candidate by using one of the following codes. If the job candidate approached the VR agency on his/her own, use Self-referral.

- Educational Institutions (elementary/secondary)
- Educational Institutions (post-secondary)
- Medical Health Provider (Public or Private)
- Welfare Agency (State or local government)
- Community Rehabilitation Programs
- Social Security Administration (Disability Determination Service or District office)
- One-stop Employment/Training Centers
- Self-referral
- Other Sources
- American Indian VR Services Program
- Centers for Independent Living
- Child Protective Services
- Consumer Organizations or Advocacy Groups
- Employers
- Faith Based Organizations
- Family/Friends
- Intellectual and Developmental Disabilities Providers
- Mental Health Provider (Public or Private)
- Public Housing Authority
- State Department of Correction/Juvenile Justice

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- State Employment Service Agency
- Veteran's Administration
- Worker's Compensation
- Other State Agencies
- Other VR State Agencies

CRP List

If the Type of Source is Community Rehabilitation Programs, select the appropriate CRP who referred the job candidate from the drop-down list. If the referring CRP is not listed, contact Financial so the CRP can be added.

Involvement with Other Agencies and Services at Application

The application form must be saved before agencies can be added to the grid in IRSS.

Enter up to three agencies from the list below that describes a service provider or funding source from which the job candidate was provided services or funding at the time of application. To add an agency, select the "Add Agency" button. Select an agency from the drop-down list then select the checkbox if the agency provided financial assistance to the job candidate. If the job candidate was not provided services or funding from any programs or organizations listed below, select the "No Involvement" checkbox.

- American Indian VR Services Program
- Centers for Independent Living
- Child Protective Services (Social Service Agency doing child protection work)
- Community Rehabilitation Programs
- Consumer Organizations or Advocacy Groups
- Educational Institutions (elementary/secondary)
- Educational Institutions (post-secondary)
- Employers
- Employment Networks (not otherwise listed)
- Federal Student Aid (such as, Pell grants, SEOG (Supplemental Educational Opportunity Grant), work study, etc.
- Intellectual and Developmental Disabilities Agencies
- Medical Health Provider (Public or Private)
- Mental Health Provider (Public or Private)
- One-stop Employment/Training Centers
- Public Housing Authority (Sec. 8 Housing/Low Rent or Rent control Programs)
- Social Security Administration (Disability Determination Service or District office)
- State Department of Correction/Juvenile Justice
- State Employment Service Agency
- Veteran's Administration

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- Welfare Agency (State or local government)
- Worker's Compensation
- Other VR State Agencies
- Other State Agencies
- Other Sources

Voter Registration

From the drop-down menu, select Yes if the job candidate completed the voter registration form and No if he/she did not. Completed voter registration forms are sent to the auditor's office of the job candidate's county seat.

Contacts for Client

The application form must be saved before contacts can be added to the grid in IRSS.

At least one long-term contact must be entered. To add a contact, select the "Add Contact" button. Enter the first name, last name and any contact information available including address, phone numbers, e-mail addresses and relationship to the job candidate. Save the form to add the contact to the contact grid on the application form. If contact with the job candidate is lost, this information is invaluable in trying to reconnect with the individual.

Did the applicant or his/her representative(s) reveal a disabling condition?

From the drop-down menu, select Yes if the job candidate and/or a representative of the job candidate revealed a disabling condition during the application process. It is possible that the job candidate may not be able to articulate his/her disabling conditions. In these cases, a representative such as a parent/guardian, teacher or case manager may provide insight into the job candidate's limitations. Verification of disabling conditions will occur through the eligibility process.

Monthly Support and Benefits Received at Application

Public Support Received:

Enter the monthly amount (to the nearest dollar) of public support received by the job candidate at application from each of the following sources. If the job candidate did not receive any monthly public support, enter "0" for each type of public support. If amounts are entered for SSDI, SSI or TANF, enter the date benefits began.

Public support means 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. Also include any payments that are sent directly to the individual in an institution or to dependents on his/her behalf. Exclude any non-cash support payments such as Medicaid, Medicare, food stamps and rental subsidies. Categories of public support are as follows:

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Social Security Disability Insurance (SSDI)

Enter the amount of SSDI received by the job candidate each month. This figure can be verified through the Social Security Administration (SSA) or from a copy of the job candidate's benefit notification letter. Enter the eight-digit date or use the calendar option to select the date this benefit began. If the date is unknown, enter the date the IPE-1 was signed.

Supplemental Security Income (SSI)

Enter the monthly payment to the job candidate under the Federal program of SSI for the aged, blind, and disabled. Only the job candidate's portion of the payment should be recorded here. This figure can be verified through the SSA or from a copy of the job candidate's benefit notification letter. Enter the eight-digit date or use the calendar option to select the date this benefit began. If the date is unknown, enter the date the IPE-1 was signed.

Temporary Assistance for Needy Families (TANF)

Enter the monthly amount of cash public assistance payments made through the federally funded TANF program. If the TANF payment is made to the family unit, use the local disbursing agency's procedure to estimate the job candidate's portion of the payment. Enter the eight-digit date or use the calendar option to select the date this benefit began. If the date is unknown, enter the date the IPE-1 was signed.

General Assistance (State or local government)Veterans' Disability Benefits

Veterans' Disability Benefits are payments made by the Department of Veterans Affairs for partial or total disability.

Workers' CompensationAll Other Public Support

Other Public Support payments are cash payments to the job candidate beyond those otherwise listed. Include payments made by Federal, State and local governments for retirement or survivor benefits to the individual as well as unemployment insurance benefits and other temporary payments. If an amount is entered under Other Public Supports, specify the type of support in the the field provided.

Select the Recalculate button. IRSS will automatically total the benefit amounts.

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Primary Source of Support:

From the drop-down menu, select the job candidate's largest single source of economic support at application, even if it accounts for less than one-half of the individual's total support.

- Employment Earnings*
- Personal Income (interest, dividends, rent, retirement including social security)
- Family and Friends
- Public Support (SSI, SSDI, TANF, etc.)
- All other sources (e.g., private disability insurance and private charities)

Note: If a job candidate is supported by the earnings of a spouse, or by the spouse's unemployment insurance checks, identify Family and Friends as the Primary Source of Support and not Employment Earnings or Personal Income. If the job candidate is primarily supported by a governmental entity with no cash support – for example, incarcerated individuals, – use Public Support as the primary source of support only if the job candidate is the recipient of the support. If the family receives public support, use Family and Friends.

*RSA rescinded the separation of Employment Earnings from Personal Income after deployment of IRSS changes on 10/1/13. Employment Earnings and Personal Income are reported to RSA under one code in the background in IRSS.

Medical Insurance at Application

From the drop-down menus, select Yes or No to indicate whether the job candidate had each type of medical insurance coverage at application.

Medicaid

Medicare

Public Insurance from Other Sources

(Workers' Compensation, Children's Health Insurance Program, etc)

Private Insurance Through Own Employer

Future Eligibility Through Own Employer

This code refers to job candidates who are not yet eligible for private insurance through their employer, but will be eligible for private insurance after a certain period of employment.

Private Insurance through Other Means

This code refers to job candidates receiving benefits through their parent/family members' insurance plan.

Private Insurance Carrier

If Private Insurance through Other Means is indicated as a health insurance source, enter the Insurance Carrier name or source of the private insurance. If the carrier and source are not known, enter Unknown.

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Education Information at Application

If still in high school, what is the expected graduation date?

Enter the eight-digit date or use the calendar option to select the job candidate's expected graduation date if still a high school student. Update IRSS as changes occur.

Education Completed Category:

From the drop-down menu, select the level of education the job candidate had attained at the time of application.

- No formal schooling
- Elementary education (grades 1-8)
- Secondary education, no high school diploma (grades 9-12)
Use this category for applicants who are attending high school but do not receive special education services under an IEP or 504 Plan.
- Special education certificate of completion/diploma or in attendance
This category is intended to capture individuals whose highest level of education is special education (answered "yes" to either the IEP or 504 questions). Use this category:
 - 1) if the individual is currently a special education student,
 - 2) if the individual received special education and earned a certificate of completion or high school diploma, or
 - 3) if the individual received special education but did not receive a certificate/diploma.
- High school graduate or equivalency certificate (GED)
Use this category for applicants who did not receive special education services and have earned a high school diploma or completed a GED program.
- Post-secondary education, no degree or certificate
- Post-secondary academic degree, Associate degree
- Vocational/Technical Certificate/Degree or License
- Bachelor's degree
- Occupational credential beyond undergraduate degree work
- Master's degree
- Any degree above a Master's - e.g. Ph.D., Ed.D., J.D.
- Occupational credential beyond graduate degree work

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Student with a Disability in Secondary Education at Application:

From the drop-down list, select the status of the job candidate with a disability in secondary education at the time of application.

- This individual is not a student with a disability in secondary education at the time of application.
- This individual is a student with a 504 accommodation plan.
- This individual is a student and is receiving services under an IEP at the time of application.
- This individual 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.

Education History:

For applicants 24 years of age or younger, entry of a high school is required. This information is needed to track and analyze transition data and to connect with Department of Education databases. The high school list is continually being updated to match up with the DE, but if a school is not on the list, contact the Administrative Services Bureau Resource Manager to have the school added.

The application form must be saved before schools can be added to the education history grid in IRSS. To add a school, select the “Add School” button. From the drop-down menu, select the appropriate education level.

High School:

- For individuals who are/were home-schooled or participated in an online program, choose the local school district or the district overseeing the academic program. Online programs that are not monitored by an Iowa school district will most likely fall under the OUT OF STATE category.
- For individuals who have dropped out of school, list the last school district attended.
- For individuals who completed a GED program, list the last school district attended.
- For individuals who completed their high school education out of state, choose OUT OF STATE from the drop down list.

A start year is required to save the high school information to the education history grid.

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Post Secondary:

After selecting the 'Add School' button and selecting "Post-Secondary" from the drop-down list, fields for the institution name, location, start year and hours completed will display. A checkbox for "Post-Secondary Institution is current" will also display. The institution name and start year are required to save the information to the education history grid. Select the "Post-Secondary Institution is Current" checkbox to enter a school currently attended. Once the checkbox is checked, the institution name field becomes a drop-down menu containing all the vendors in IRSS that are identified as academic vendors and the location textbox disappears. A field for 'Post-Secondary Student ID Number' also displays. This field can be used to store student ID numbers. If the school needed is not in the list, uncheck the "Post-Secondary Institution is current" checkbox and enter the school in the "Post-Secondary Training Institution Name" textbox. To have the school added to the academic vendor list, first check I-3 to see if the vendor is set up. If the vendor is in I-3, contact Financial to have the vendor added to IRSS. If the vendor is not in I-3, get a W-9 signed by the vendor to get them added to I-3 and IRSS. Users should only do this if it is anticipated that authorizations will be done to the vendor in the future.

There is no limit to the number of schools that can be entered in the education history grid. Entry of post-secondary education history is not required.

RSA Employment Status at Application:

From the drop-down menu, select the employment status of the job candidate at application.

Employment without Supports in Integrated Setting is full-time or part-time employment in an integrated setting without ongoing support services. For purposes of this report, this is work performed for wages, salary, commissions, tips, or piece-rates, below, at, or above the minimum wage. Do not include self-employed individuals.

Extended Employment refers to work for wages or salary in a non-integrated setting for a public or nonprofit organization. Such settings are variously referred to as community rehabilitation programs, or sheltered, industrial, or occupational workshops. Individuals are compensated according to the Fair Labor Standards Act and the organization provides any needed support services that enable the individual to train or prepare for competitive employment.

Self-employment (except BEP) refers to 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.

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State Agency-managed Business Enterprise Program (BEP) (USED FOR IDB/ISE CASES ONLY) refers to Randolph-Sheppard vending facilities and other small businesses operated by individuals with significant disabilities under the management and supervision of a State VR agency. Include home industry where the work is done under the management and supervision of a State VR agency in the individual's own home or residence for wages, salary, or on a piece-rate. Individuals capable of activity outside the home, as well as homebound individuals, may engage in such employment.

Homemaker refers to men and women whose activity is keeping house with no earnings for persons in their households or for themselves if they live alone.

Unpaid Family Worker refers to persons who work without pay on a family farm or in a family business.

Employment with Supports in Integrated Setting is full-time or part-time employment in an integrated setting with ongoing support services for individuals with significant disabilities (supported employment).

Not employed: Student in Secondary Education including GED classes and special education classes with the goal of obtaining a high school diploma or GED.

Not employed: All Other Students are persons attending school full or part-time other than students in secondary education (for example, students in post-secondary education, adult education, or vocational training).

Not employed: Trainee, Intern or Volunteer refers to persons engaging in unpaid work experiences, internships or volunteer work for purposes of increasing their employability. Such individuals may receive a stipend to defray the cost of transportation or other incidental expenses.

Not employed: Other refers to persons not in any of the other categories (e.g., persons just out of school who are not yet employed; persons unable to retain or obtain work; and persons who have recently left specialized medical facilities).

When a job candidate's work activity overlaps into two different employment categories, select the code more descriptive of the individual's employment activity at application.

Hours per Week at Application:

Enter the number of hours the job candidate worked for earnings in a typical week at the time of application. Earnings may have been in the form of wages, salaries, tips, commissions, profits from self-employment, adjusted gross income for salespersons, etc.

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Wage at Application:

Enter the amount of money (to the nearest dollar) earned at the time of application.

This item collects data on the cash earnings of individuals at application and includes all 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 individuals, 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, etc.), to obtain a meaningful figure for a typical 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 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.

Under Per, enter whether the wages are earned Hourly, Weekly, Bi-Weekly, Twice a Month, Monthly or Annually. Select the Recalculate button and IRSS will automatically calculate the monthly wage.

When work hours entered is equal to one or wages entered is less than \$3 per hour, then additional fields will populate to identify the SOC Code, SOC Category and Job Title of the job candidate's employment at application.

Primary SOC Code Category:

From the drop-down list select the two-digit number representing the Standard Occupational Classification (SOC) major occupation group that matches the job candidate's employment.

Primary SOC Code:

From the drop-down list, select the SOC code that best represents the job candidate's employment. For the employment situations unique to the VR program, use the special codes indicated below.

599999 Homemaker (own home) refers to men and women whose activity is keeping house for their families, or themselves if they live alone.

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- 799999 Unpaid family worker (own family), not elsewhere classified use only if the type of unpaid family work cannot be classified according to any of the occupations.
- 899999 Randolph-Sheppard vending facility clerk use this category for persons employed as clerks, sales persons, or helpers in a vending facility operated under the Randolph-Sheppard Vending Facility Program. Use this special code even though these occupations are classifiable. Do not include vending facility operators (999999), or individuals employed in vending facilities outside the Vending Facility Program (use their occupation code). **This code is used for IDB/ISE cases only.**
- 999999 Randolph-Sheppard vending facility operator use this category for individuals employed as operators or managers of vending facilities operated under the Vending Facility Program. Use this special code even though these occupations are classifiable. Do not include vending facility clerks (899999), or individuals employed as vending facility operators outside the Randolph-Sheppard Vending Facility Program (use their occupation code). Randolph-Sheppard vending facility operator. **This code is used for IDB/ISE cases only.**

Have you served in the military?

From the drop-down menu, select Yes to indicate that the job candidate served in the active military, naval or air service or Currently if the individual is in active service and has not been discharged. Otherwise, select No. If Yes is selected, indicate whether the job candidate was Honorably or Dishonorably discharged from service. If the discharge was Dishonorable, provide an explanation in the box provided.

Open Case

To open a case in IRSS, select the Review/Open Case button at the top of the application form. The Rights and Responsibilities page will display. Enter the date of the IPE-1 and select a counselor assignment from the drop-down menu. The case will automatically be assigned a case file number using the following format.

CASE NUMBER – When a new case record is created in IRSS, a case number is automatically generated and assigned to the record. The case number is determined by the following method. The first three digits represent the office number of

assignment; the next four digits is the sequential case assignment within that office that fiscal year; and the last two digits represent the federal fiscal year of assignment.

<u>OFFICE NUMBER</u>	<u>JOB CANDIDATE ASSIGNMENT</u>	<u>FISCAL YEAR</u>
002	0036	01

To access the case from the Application Form, select the Return to Case button.

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To input additional data on an already open case in IRSS type in the case number or any other personal identifiable information on either the Search and Add screen or a Caseload page, as appropriate. To work on another case, navigate to the Search and Add screen or to the appropriate Caseload page to perform a new search.

PRESUMPTIVE ELIGIBILITY

Once receipt of Social Security benefits is confirmed, a job candidate is presumed eligible for VR services. To enter presumptive eligibility in IRSS, assure that benefit amount(s) and the date(s) benefits began are entered on the job candidate's application form, and then navigate to the Case Forms page. Under Update SSI/SSDI and Presumptive Eligibility, select the Approve Presumptive Eligibility button. Enter the date benefits were confirmed and approve the presumptive eligibility. The case will move to status 04-0.

Note: The VR counselor completes an Eligibility Form to complete the eligibility process.

ELIGIBILITY FORM

In the job candidate's case record in IRSS, navigate to the Case Forms page. Select the Add a New Eligibility Form button.

Primary Disability:

Enter the four-digit code that best describes the individual's primary physical or mental impairment that causes or results in a substantial impediment to employment. The number reported is a combination of the impairment code and cause/source code. From the first drop-down list, select the first two digits that designate the impairment (sensory, physical or mental), and from the second drop-down list, select the last two digits that indicate the cause or source of the impairment. If the person is found not to have a disability, select No Impairment.

Secondary Disability:

Enter the four-digit code that best describes the secondary disability. This is the physical or mental impairment that contributes to, but is not the primary basis of, the impediment to employment. The number reported is a combination of the impairment code and cause/source code. From the first drop-down list, select the first two digits that designate the impairment (sensory, physical or mental), and from the second drop-down list, select the last two digits that indicate the cause or source of the impairment. If the person is found not to have a disability or a secondary disability, select No Impairment.

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CODES FOR IMPAIRMENTS

- 0000 No impairment
- 9999 Closed before impairment was determined

Sensory/Communicative Impairments:**BLINDNESS, one or both eyes, due to --**

- 0100 Unknown causes
- 0101 Accidents or injuries (other than TBI or Spinal Cord Injury)
- 0110 Cancer
- 0113 Congenital condition or birth injury
- 0116 Diabetes Mellitus
- 0126 Multiple Sclerosis
- 0127 Muscular Dystrophy
- 0128 Parkinson's disease or other neurological disorders
- 0130 Physical disorders/conditions, not elsewhere listed
- 0136 Stroke
- 0137 Traumatic brain injury (TBI)

OTHER visual impairments, due to –

- 0200 Unknown causes
- 0201 Accidents or injuries (other than TBI or SCI)
- 0210 Cancer
- 0213 Congenital condition or birth injury
- 0216 Diabetes Mellitus
- 0226 Multiple Sclerosis
- 0227 Muscular Dystrophy
- 0228 Parkinson's disease or other neurological disorders
- 0230 Physical disorders/conditions, not elsewhere listed
- 0235 Spinal cord injury (SCI)
- 0236 Stroke
- 0237 Traumatic brain injury

DEAFNESS, primary communication visual, due to –

- 0300 Unknown cause
- 0301 Accidents or injuries (other than TBI or SCI)
- 0310 Cancer
- 0313 Congenital condition or birth injury
- 0328 Parkinson's disease or other neurological disorders
- 0330 Physical disorder/conditions, not elsewhere listed
- 0336 Stroke
- 0337 TBI

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DEAFNESS, primary communication auditory, due to –

- 0400 Unknown cause
- 0401 Accidents or injuries (other than TBI or SCI)
- 0410 Cancer
- 0413 Congenital condition or birth injury
- 0428 Parkinson's disease or other neurological disorders
- 0430 Physical disorder/conditions, not elsewhere listed
- 0436 Stroke
- 0437 TBI

HEARING LOSS, primary communication visual, due to –

- 0500 Unknown cause
- 0501 Accidents or injuries (other than TBI or SCI)
- 0510 Cancer
- 0513 Congenital condition or birth injury
- 0528 Parkinson's disease or other neurological disorders
- 0530 Physical disorder/conditions, not elsewhere listed
- 0536 Stroke
- 0537 TBI

HEARING LOSS, primary communication auditory, due to –

- 0600 Unknown cause
- 0601 Accidents or injuries (other than TBI or SCI)
- 0610 Cancer
- 0613 Congenital condition or birth injury
- 0628 Parkinson's disease or other neurological disorders
- 0630 Physical disorder/conditions, not elsewhere listed
- 0636 Stroke
- 0637 TBI

OTHER HEARING IMPAIRMENTS (tinnitus, Meniere's, hyperacusis, etc.) due to –

- 0700 Unknown cause
- 0701 Accidents or injuries (other than TBI or SCI)
- 0710 Cancer
- 0713 Congenital condition or birth injury
- 0728 Parkinson's disease or other neurological disorders
- 0730 Physical disorder/conditions, not elsewhere listed
- 0736 Stroke
- 0737 TBI

DEAF-BLINDNESS, due to –

- 0800 Unknown cause
- 0801 Accidents or injuries (other than TBI or SCI)
- 0810 Cancer
- 0813 Congenital condition or birth injury

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- 0828 Parkinson's disease or other neurological disorders
- 0830 Physical disorder/conditions, not elsewhere listed
- 0836 Stroke
- 0837 TBI

COMMUNICATIVE IMPAIRMENTS (expressive/receptive), due to –

- 0900 Unknown causes
- 0901 Accidents or injuries (other than TBI or Spinal Cord Injury)
- 0910 Cancer
- 0912 Cerebral Palsy
- 0913 Congenital condition or birth injury
- 0914 Cystic Fibrosis
- 0916 Diabetes Mellitus
- 0925 Mental Retardation
- 0926 Multiple Sclerosis
- 0927 Muscular Dystrophy
- 0928 Parkinson's disease or other neurological disorders
- 0930 Physical disorders/conditions, not elsewhere listed
- 0931 Polio
- 0932 Respiratory disorders, other than Cystic Fibrosis or Asthma
- 0935 Spinal cord injury (SCI)
- 0936 Stroke
- 0937 Traumatic brain injury (TBI)

PHYSICAL IMPAIRMENTS:

MOBILITY ORTHOPEDIC/NEUROLOGICAL IMPAIRMENTS, due to –

- 1000 Unknown causes
- 1001 Accidents or injuries (other than TBI or Spinal Cord Injury)
- 1002 Alcoholism
- 1003 Amputations
- 1005 Arthritis and Rheumatism
- 1010 Cancer
- 1011 Cardiac and other conditions of the circulatory system
- 1012 Cerebral Palsy
- 1013 Congenital condition or birth injury
- 1014 Cystic Fibrosis
- 1016 Diabetes Mellitus
- 1020 End-Stage Renal disease and other genitourinary system disorders
- 1021 Epilepsy
- 1022 HIV and AIDS
- 1023 Immune deficiencies, excluding HIV/AIDS
- 1026 Multiple Sclerosis
- 1027 Muscular Dystrophy
- 1028 Parkinson's disease or other neurological disorders

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- 1030 Physical disorders/conditions, not elsewhere listed
- 1031 Polio
- 1035 Spinal cord injury (SCI)
- 1036 Stroke
- 1037 Traumatic brain injury (TBI)

**MANIPULATION/DEXTERITY ORTHOPEDIC/NEUROLOGICAL IMPAIRMENTS,
due to –**

- 1100 Unknown causes
- 1101 Accidents or injuries (other than TBI or Spinal Cord Injury)
- 1102 Alcoholism
- 1103 Amputations
- 1105 Arthritis and Rheumatism
- 1110 Cancer
- 1112 Cerebral Palsy
- 1113 Congenital condition or birth injury
- 1116 Diabetes Mellitus
- 1120 End-Stage Renal disease and other genitourinary system disorders
- 1121 Epilepsy
- 1122 HIV and AIDS
- 1123 Immune deficiencies, excluding HIV/AIDS
- 1126 Multiple Sclerosis
- 1127 Muscular Dystrophy
- 1128 Parkinson's disease or other neurological disorders
- 1130 Physical disorders/conditions, not elsewhere listed
- 1131 Polio
- 1135 Spinal cord injury (SCI)
- 1136 Stroke
- 1137 Traumatic brain injury (TBI)

**MOBILITY AND MANIPULATION/DEXTERITY ORTHOPEDIC/NEUROLOGICAL
IMPAIRMENTS, due to -**

- 1200 Unknown causes
- 1201 Accidents or injuries (other than TBI or Spinal Cord Injury)
- 1202 Alcoholism
- 1203 Amputations
- 1205 Arthritis and Rheumatism
- 1209 Blood disorders
- 1211 Cardiac and other conditions of the circulatory system
- 1212 Cerebral Palsy
- 1213 Congenital condition or birth injury
- 1216 Diabetes Mellitus
- 1221 Epilepsy
- 1222 HIV and AIDS
- 1223 Immune deficiencies, excluding HIV/AIDS
- 1226 Multiple Sclerosis

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- 1227 Muscular Dystrophy
- 1228 Parkinson's disease or other neurological disorders
- 1230 Physical disorders/conditions, not elsewhere listed
- 1231 Polio
- 1235 Spinal cord injury (SCI)
- 1236 Stroke
- 1237 Traumatic brain injury (TBI)

OTHER ORTHOPEDIC IMPAIRMENTS (e.g., limited range of motion), due to-

- 1300 Unknown causes
- 1301 Accidents or injuries (other than TBI or Spinal Cord Injury)
- 1303 Amputations
- 1305 Arthritis and Rheumatism
- 1310 Cancer
- 1312 Cerebral Palsy
- 1313 Congenital condition or birth injury
- 1314 Cystic Fibrosis
- 1316 Diabetes Mellitus
- 1321 Epilepsy
- 1322 HIV and AIDS
- 1323 Immune deficiencies, excluding HIV/AIDS
- 1326 Multiple Sclerosis
- 1327 Muscular Dystrophy
- 1328 Parkinson's disease or other neurological disorders
- 1330 Physical disorders/conditions, not elsewhere listed
- 1331 Polio
- 1335 Spinal cord injury (SCI)
- 1336 Stroke
- 1337 Traumatic brain injury (TBI)

RESPIRATORY IMPAIRMENTS, due to –

- 1400 Unknown causes
- 1401 Accidents or injuries (other than TBI or Spinal Cord Injury)
- 1406 Asthma and other allergies
- 1409 Blood disorders
- 1410 Cancer
- 1412 Cerebral Palsy
- 1413 Congenital condition or birth injury
- 1414 Cystic Fibrosis
- 1422 HIV and AIDS
- 1423 Immune deficiencies, excluding HIV/AIDS
- 1426 Multiple Sclerosis
- 1427 Muscular Dystrophy
- 1428 Parkinson's disease and other neurological disorders
- 1430 Physical disorders/conditions, not elsewhere listed
- 1431 Polio
- 1432 Respiratory disorders, other than Cystic Fibrosis or Asthma

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GENERAL PHYSICAL DEBILITATION (fatigue, weakness, pain, etc.), due to –

- 1500 Unknown causes
- 1501 Accidents or injuries (other than TBI or Spinal Cord Injury)
- 1502 Alcohol abuse or dependence
- 1503 Amputations
- 1505 Arthritis and Rheumatism
- 1506 Asthma and other allergies
- 1509 Blood disorders
- 1510 Cancer
- 1511 Cardiac and other conditions of the circulatory system
- 1512 Cerebral Palsy
- 1513 Congenital condition or birth injury
- 1514 Cystic Fibrosis
- 1516 Diabetes Mellitus
- 1517 Digestive disorders
- 1518 Drug abuse or dependence (other than alcohol)
- 1519 Eating disorders (e.g., anorexia, bulimia, compulsive overeating)
- 1520 End-Stage Renal disease and other genitourinary system disorders
- 1521 Epilepsy
- 1522 HIV and AIDS
- 1523 Immune deficiencies, excluding HIV/AIDS
- 1526 Multiple Sclerosis
- 1527 Muscular Dystrophy
- 1528 Parkinson's disease or other neurological disorders
- 1530 Physical disorders/conditions, not elsewhere listed
- 1531 Polio
- 1532 Respiratory disorders, other than Cystic Fibrosis or Asthma
- 1535 Spinal cord injury (SCI)
- 1536 Stroke
- 1537 Traumatic brain injury (TBI)

OTHER PHYSICAL IMPAIRMENTS, not listed above, due to –

- 1600 Unknown causes
- 1601 Accidents or injuries (other than TBI or Spinal Cord Injury)
- 1602 Alcohol abuse or dependence
- 1603 Amputations
- 1605 Arthritis and Rheumatism
- 1606 Asthma and other allergies
- 1609 Blood disorders
- 1610 Cancer
- 1611 Cardiac and other conditions of the circulatory system
- 1612 Cerebral Palsy
- 1613 Congenital condition or birth injury
- 1614 Cystic Fibrosis
- 1616 Diabetes Mellitus
- 1617 Digestive disorders

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- 1618 Drug abuse or dependence (other than alcohol)
- 1619 Eating disorders (e.g., anorexia, bulimia, compulsive overeating)
- 1620 End-Stage Renal disease and other genitourinary system disorders
- 1621 Epilepsy
- 1622 HIV and AIDS
- 1623 Immune deficiencies, excluding HIV/AIDS
- 1626 Multiple Sclerosis
- 1627 Muscular Dystrophy
- 1628 Parkinson's disease or other neurological disorders
- 1630 Physical disorders/conditions, not elsewhere listed
- 1631 Polio
- 1632 Respiratory disorders, other than Cystic Fibrosis or Asthma
- 1635 Spinal cord injury (SCI)
- 1636 Stroke
- 1637 Traumatic brain injury (TBI)

COGNITIVE IMPAIRMENTS (impairments involving learning, thinking, processing information and concentration), due to –

- 1700 Unknown causes
- 1701 Accidents or injuries (other than TBI or Spinal Cord Injury)
- 1702 Alcohol abuse or dependence
- 1707 Attention-deficit hyperactivity disorder (ADHD)
- 1708 Autism
- 1713 Congenital condition or birth injury
- 1718 Drug abuse or dependence (other than alcohol)
- 1722 HIV or AIDS
- 1723 Immune deficiencies, excluding HIV/AIDS
- 1725 Mental retardation/Mental Disability/Borderline Intellectual Functioning
- 1728 Parkinson's disease and other neurological disorders
- 1730 Physical disorder/condition, not elsewhere listed
- 1734 Specific learning disabilities
- 1735 Spinal cord injury (SCI)
- 1736 Stroke
- 1737 Traumatic brain injury (TBI)

PSYCHOSOCIAL IMPAIRMENTS (interpersonal and behavioral impairments, ability to cope), due to –

- 1800 Unknown causes
- 1802 Alcohol abuse or dependence
- 1804 Anxiety disorders
- 1807 Attention-deficit hyperactivity disorder (ADHD)
- 1808 Autism
- 1809 Blood disorders
- 1810 Cancer
- 1811 Cardiac and other conditions of the circulatory system
- 1813 Congenital condition or birth injury

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- 1815 Depressive and other mood disorders
- 1818 Drug abuse or dependence (other than alcohol)
- 1819 Eating disorders (e.g., anorexia, bulimia, compulsive overeating)
- 1824 Mental illness, not elsewhere listed
- 1829 Personality disorders
- 1833 Schizophrenia and other psychotic disorders
- 1835 Spinal cord injury (SCI)
- 1836 Stroke
- 1837 Traumatic brain injury (TBI)

OTHER MENTAL IMPAIRMENTS, due to –

- 1900 Unknown causes
- 1901 Accident or injuries (other than TBI or Spinal Cord Injuries)
- 1902 Alcohol abuse or dependence
- 1907 Attention-deficit hyperactivity disorder (ADHD)
- 1908 Autism
- 1909 Blood disorders
- 1910 Cancer
- 1911 Cardiac and other conditions of the circulatory system
- 1913 Congenital conditions or birth injury
- 1918 Drug abuse or dependence (other than alcohol)
- 1919 Eating disorders (e.g., anorexia, bulimia, compulsive overeating)
- 1922 HIV and AIDS
- 1923 Immune deficiencies, excluding HIV/AIDS
- 1924 Mental illness, not elsewhere listed
- 1925 Mental retardation
- 1928 Parkinson's disease and other neurological disorders
- 1934 Specific learning disabilities
- 1935 Spinal cord injury (SCI)
- 1936 Stroke
- 1937 Traumatic brain injury (TBI)

Waiting List Category:

Select the radio button beside the appropriate code to indicate whether the individual was considered a person with a most significant disability, a significant disability or others eligible.

Save and approve the Eligibility Form to move the job candidate to the appropriate waiting list. If additional limitations are discovered, enter a new Eligibility Form to update disability code(s) or the waiting list category.

If it is determined that an eligibility decision cannot be made within the 60-day time frame, an extension of eligibility determination must be signed by the job candidate to allow more time. To enter the extension in IRSS, navigate to the Case Tools page. Under Add Case Events, from the drop-down menu choose Extension of

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Eligibility Determination – 30 days and select the OK button. Navigate to the Case Approvals page to approve the extension.

TRIAL WORK EXPERIENCE/EXTENDED EVALUATION

Trial Work Experience and Extended Evaluation are part of the VR experience for severely disabled individuals for whom an employment outcome might be in doubt. If it is determined that pre-eligibility assessment activities that include trial work experiences and/or extended evaluation are necessary, do not enter an eligibility form in IRSS. Instead, navigate to the Case Tools page and enter a Status Change to status 06-0.

Trail Work (Job-Tryout) and Extended Evaluations are entered in IRSS Direct Services. At least two Job Tryout Direct Services are required before a case can close from status 06-0. These may be performed directly by VR staff or purchased from a vendor and authorized as a paid service. Even when the service is purchased, a Direct Service must be entered because beginning and ending dates of trial work and extended evaluation are reported to RSA by utilizing the dates entered on the Direct Services.

INDIVIDUAL PLAN FOR EMPLOYMENT (IPE-2)

The 2010 Standard Occupational Classification System (SOC) should be referenced to obtain the six-digit code that most closely corresponds to the job candidate's employment goal. However, not all SOC codes are available in IRSS. A list of available codes can be requested from IRSS Support.

In the job candidate's case record in IRSS, navigate to the Case Forms page and select the Add a New IPE Form button.

Employment Goal Category:

From the drop-down list, select the two-digit number representing the Standard Occupational Classification (SOC) major occupation group that matches the job candidate's employment goal.

Employment Goal:

From the drop-down list, select the SOC code that best represents the job candidate's employment goal. For the employment situations unique to the VR program, use the special codes indicated below.

599999 Homemaker (own home) refers to men and women whose activity is keeping house for their families, or themselves if they live alone.

799999 Unpaid family worker (own family), not elsewhere classified use only if the type of unpaid family work cannot be classified according to any of the occupations.

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899999 Randolph-Sheppard vending facility clerk use this category for persons employed as clerks, sales persons, or helpers in a vending facility operated under the Randolph-Sheppard Vending Facility Program. Use this special code even though these occupations are classifiable. Do not include vending facility operators (999999), or individuals employed in vending facilities outside the Vending Facility Program (use their occupation code). **This code is used for IDB/ISE cases only.**

999999 Randolph-Sheppard vending facility operator use this category for individuals employed as operators or managers of vending facilities operated under the Vending Facility Program. Use this special code even though these occupations are classifiable. Do not include vending facility clerks (899999), or individuals employed as vending facility operators outside the Randolph-Sheppard Vending Facility Program (use their occupation code). Randolph-Sheppard vending facility operator. **This code is used for IDB/ISE cases only.**

Weekly Hours Worked Goal

Enter the number of hours per week the job candidate will work upon successful completion of their employment goal.

Expected Completion Date:

Enter the eight-digit date or use the calendar option to select the date by which the goal called for on the IPE is expected to be completed, including placement on a job and the ninety days of employment.

Next Review Date:

Enter the eight-digit date or use the calendar option to select the date of the job candidate's next expected review of progress.

Save the IPE 2-Plan page then navigate to the Services Needed page by selecting the Services Needed button.

Select the Add New Service button to add services called for on the IPE.

Services:

From the drop-down menu, select the service category.

To Begin:

Enter the eight-digit date or use the calendar option to select the date the service will begin.

To End:

Enter the eight-digit date or use the calendar option to select the date the service will end.

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Provided or Arranged by:

Use the check boxes to select IVRS, Job Candidate or Other. If Other is selected, in the text box provided enter the name of the individual and/or business that will provide or arrange for the service.

Select the Add to List button to add the service to the IPE-2 Services Needed grid. Repeat this process to add all services included on the IPE.

SERVICE CATEGORIES**Assessment**

Assessment means services provided and activities performed to: determine a job candidate's eligibility for VR services; to assign 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 include, but are not limited to:

- a) psychological assessments;
- b) audiological evaluations;
- c) dental and medical exams;
- d) other assessments of interests and interpersonal skills;
- e) related functional capacities;
- f) educational achievements;
- g) work experience;
- h) vocational aptitudes;
- i) personal and social adjustments;
- j) employment opportunities of the individual;
- k) medical, psychiatric, psychological; and
- l) other pertinent, educational, cultural, social, recreational, and environmental factors that affect the employment and rehabilitation needs of the individual.

Physical/Mental Treatment

Physical/Mental Treatment means:

- a) Corrective surgery or therapeutic treatment that is likely, within a reasonable period of time, to correct or modify substantially a physical or mental impairment that constitutes a substantial impediment to employment;
- b) Diagnosis and treatment for mental and emotional disorders by qualified personnel who meet State licensure laws;
- c) Dentistry;
- d) Nursing services;

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- e) Necessary hospitalization (either inpatient or outpatient care) in connection with surgery or treatment;
- f) Drugs and supplies;
- g) Prescription of prosthetics and/or orthotics related to the individual's diagnosed disability and is necessary for the achievement of the employment outcome;
- h) Prescription of eyeglasses and visual services, including visual training, related to the individual's diagnosed disability and necessary for the achievement of the employment outcome;
- i) Podiatry;
- j) Physical therapy;
- k) Occupational therapy;
- l) Speech or hearing therapy;
- m) Mental health services;
- n) Treatment of either acute or chronic medical complications and emergencies that are associated with or arise out of the provision of physical and mental restoration services or that are inherent in the condition under treatment;
- o) Special services for the treatment of individuals with end-stage renal disease, including transplantation, dialysis, artificial kidneys, and supplies;
- p) Other medical or medically related rehabilitation services; and
- q) Medical care for acute conditions arising during rehabilitation and constituting a barrier to the achievement of an employment outcome is also included in this category.

Counseling and Guidance

Vocational rehabilitation counseling and guidance includes assisting the job candidate in planning for and implementing a plan that leads to employment. The Counselor guides the individual through a process of self discovery and understanding of the American business culture, providing information and support services to assist a job candidate in exercising informed choice and is distinct from the case management relationship that exists between the counselor and the individual during the VR process.

Guidance and Counseling is entered as a direct service when the case record demonstrates bi-weekly to monthly meetings where the counselor and job candidate have discussed work readiness and vocational preparatory issues through which

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They develop strategies to find and/or keep a job, typically delivered in status 14-0. Guidance and Counseling can be entered as a direct service in a training plan if the case record demonstrates the same frequency of meetings and content of the meetings. If the case record shows that most of the discussion was about the training program, then it is not the same level of guidance and counseling and cannot be entered as a direct service.

TRAINING

Training services may be formalized academic programs, or less formal aptitude and skill-based enhancement programs that improve the individual's employability consistent with a vocational goal or training needed to adjust to the limitations of the individual's impairment. If the job candidate receives more than one type of training, each type should be recorded. For those individuals 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 or 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

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. 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 during this training and will remain in the same or a similar job upon successful completion.

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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 co-op 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 completion of the program.

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 job candidate for the world of work (e.g., appropriate work behaviors, getting to work on time, appropriate dress and grooming, increasing productivity).

Disability-Related Skills Training

Disability-related Skills Training includes training to learn how to perform actions or use and operate equipment and devices due to a disability. Examples include, but are not limited to, training on the use of vehicle modifications as an accommodation to a disability or training on ASL for a person who is becoming deaf.

Miscellaneous Training

Any training not recorded in one of the other categories listed, including GED 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 Seeking Skills

Job search activities support and assist a job candidate 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 consumer.

Job Placement Assistance

Job placement assistance is a referral to a specific job resulting in an interview, whether or not the job candidate obtained the job.

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On-the-job Supports - Short term

Support services provided to a job candidate who has been placed in employment in order to stabilize the placement and enhance job retention. Such services include short-term job coaching for job candidates who do not have a supported employment goal consistent with the employment goal on the IPE.

Supported Employment

On-going support services and other appropriate services needed to support and maintain a job candidate with a most significant disability in supported employment for a period of time generally not to exceed 18 months. Such services, such as job coaching, are for job candidates who have supported employment and long-term supports identified on the IPEs. On-the-job support services with a supported employment goal are funded using Title VI, Part B and Title I funds.

Transportation

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 job candidate to participate in a VR service. Examples of transportation services/expenses include, but are not limited to:

- a) Travel and related expenses for a personal care attendant or aide if the services of that person are necessary to enable the job candidate to travel to participate in any VR service;
- b) Relocation expenses incurred by the job candidate in connection with a job placement that is a significant distance from the individual's current residence;
- c) The purchase and repair of vehicles, including vans. This specifically excludes the modification of vehicles, which is to be reported in rehabilitation technology;
- d) Training in the use of public transportation vehicles and systems.

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 job candidate, and that are necessitated by the individual's participation in an assessment for determining eligibility and VR needs or while receiving services under an IPE. Examples of maintenance expenses include, but are not limited to:

- a) cost of uniforms or other suitable clothing required for a job candidate's job placement or job seeking activities;
- b) cost of short-term expenses, such as food and shelter, that is required in order for a job candidate to participate in assessment or vocational training at a site that is not within commuting distance of an their home;

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- c) initial one-time costs, such as security deposits or charges for the initiation of utilities, that are required in order for a job candidate to relocate for a job placement; and
- d) cost of a job candidate's participation in enrichment activities related to their training program.
- e) cost of short-term day care expenses required for a job candidate's job placement until the individual receives their first paycheck.

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. See also 34 CFR 361.5(b)(45). The term includes the following:

- a) Rehabilitation Engineering Services are the systematic application of engineering sciences to design, develop, test, evaluate, apply, and distribute technological solutions to problems confronted by job candidates in functional areas such as mobility, communications, hearing, vision, and cognition, and in activities associated with employment, independent living, education, and integration into the community.
- b) Assistive Technology Devices are any items, piece of equipment, or product system, whether acquired commercially off the shelf, modified or customized, that is used to increase, maintain, or improve the functional capabilities of a job candidate.
- c) Assistive Technology Services are any services that directly assist a job candidate with a disability in the selection, acquisition, or use of an assistive technology device. Services may include:
 - 1. the evaluation of the needs of a job candidate, including a functional evaluation of the individual in his/her customary environment;
 - 2. purchasing, leasing, or otherwise providing for the acquisition by a job candidate of an assistive technology device;
 - 3. selecting, designing, fitting, customizing, adapting, applying, maintaining, repairing, or replacing assistive technology devices;

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4. coordinating and using other therapies, interventions, or services with assistive technology devices, such as those associated with existing education and rehabilitation plans and programs;
5. training or providing technical assistance for a job candidate or, if appropriate, their family members, guardians, advocates, or authorized representatives; and
6. training or providing technical assistance for professionals (including individuals providing education and rehabilitation services), employers, or others who provide services to, employ, or are otherwise substantially involved in the major life functions of a job candidate to the extent that training or technical assistance is necessary for the individual to achieve an employment outcome.

PERSONAL ASSISTANCE SERVICES

Personal Assistance Services are a range of services provided by one or more persons designed to assist a job candidate to perform daily living activities on or off the job that would typically be performed without assistance if he or she did not have a disability. The services must be designed to increase the job candidate'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 job candidate is receiving other VR services. The services may include training in managing, supervising, and directing personal assistance services.

Three distinct services that are considered personal assistance services are reader services, interpreter services, and personal attendant services. Further information on recording each of these services follows. Record only whether and which of these services were provided to the job candidate (e.g., if the same person provided both reader service and personal attendant service to the job candidate, indicate both services).

Reader Services

Reader services are for job candidates 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 job candidate requests such transcription. Reader services are generally for individuals who are blind or deaf-blind, but may also include job candidates unable to read because of serious neurological disorders, specific learning disabilities, or other physical or mental impairments.

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Interpreter Services

Interpreter services are sign language or oral interpretation services for job candidates who are deaf or hard of hearing and tactile interpretation services for individuals who are deaf-blind. Specially trained individuals perform sign language or oral interpretation. Also include here 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

Personal attendant services are those personal services that an attendant performs for a job candidate 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.

Self-Employment Services

Technical assistance and other consultation services provided to conduct market analyses, to develop business plans, and to provide financial assistance to job candidates in the pursuit of self-employment, telecommuting and small business operation outcomes.

Information and Referral Services

Information and referral services are provided to job candidates who need services from other agencies (e.g., cooperative agreements) not available through the VR program.

Benefits Counseling

Assistance provided to a job candidate 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 job candidate's current benefits, such as SSDI and SSI, the individual's financial situation, and the effect different income levels from work will have on their future financial situation. This assistance is intended to provide the job candidate an opportunity to make an informed choice regarding the pursuit of employment. Ongoing assistance may also be provided as the job candidate decides on employment goals, searches for jobs, and becomes employed.

Customized Employment Services (Job Carving)

Services that involve a blend of flexible strategies that result in the provision of individually negotiated and designed services, supports, and job opportunities for a job candidate and that lead to an employment outcome of customized employment, including self-employment. A key factor in deciding if a service is a customized employment service is the presence of employer negotiation, including customizing a job description based on current unidentified and unmet needs of the employer and the needs of the employee; developing a set of job duties or tasks; developing a

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work schedule (including determining hours worked); determining a job location; developing a job arrangement (such as job carving, job sharing, or a split schedule); or determining specifics of supervision.

Other Services

Use this category for all other VR services that cannot be recorded elsewhere. Included here are occupational licenses, tools and equipment, initial stocks and supplies.

When all services have been added to the IPE-2 Services Needed grid, save and approve the IPE-2 form. For the approval date of this form, assume that the IPE is effective on the date on which both the agency and job candidate reach agreement. If the two signatures bear two different dates, the later date should govern. The case will automatically move to status 12-0 upon approval of the form.

If it is determined that a plan for employment cannot be developed within the 120-day time frame, an extension of plan development must be signed by the job candidate to allow more time. To enter the extension in IRSS, navigate to the Case Tools page. Under Add Case Events, from the drop-down menu choose Extension of Plan Development Timeframe – 30 days and select the OK button. Navigate to the Case Approvals page to approve the extension.

STATUS CHANGES

Most status changes are entered on the Case Tools page, but some are automatically assigned by certain actions in IRSS.

The status code is a three digit number which represents certain situations. The three digit codes are:

- 02-0 Applicant
- 04-0 Eligible, but does not meet the criteria for the level of severity being served
- 06-0 Trial Work Experiences/Extended Evaluation
- 08-0 Closed Before Acceptance (from status 02-0)
- 10-0 Accepted for Service/Program Development (adults)
- 10-1 Accepted for Service/Program Development (transition students)
- 12-0 Plan Developed/Awaiting Start of Services
- 14-0 Counseling and Guidance, only (generally long-term, culminating in the job candidate being placed in Ready for Employment, Status 20-0, and a job search started)
- 16-0 Physical or Mental Restoration

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- 18-1 Training, Workshop/Facility (other than supported employment)
- 18-2 Training, On-the-Job
- 18-3 Training, Vocational-Technical
- 18-4 Training, Academic
- 18-5 Training, Correspondence
- 18-6 Training, Supported Employment
- 18-7 Training, Other (including non-supported employment job coaching)
- 20-0 Ready for Employment
- 22-0 In Employment
- 24-0 Services Interrupted
- 26-0 Closed Rehabilitated (from Status 22-0)
- 28-0 Closed After Program Initiated (from Status 14-0 or above)
- 30-0 Closed Before Program Initiated (from Status 10-0 or 12-0)
- 32-0 Post-Employment Services (from Status 26-0 only)
- 33-1 Closed After Post-Employment Services-Previous Employment Maintained (from Status 32-0)
- 33-2 Closed After Post-Employment Services-Casefile Reopened (from Status 32-0)
- 33-3 Closed After Post-Employment Services-Other Outcome (from Status 32-0)
- 38-0 Closed from the Waiting List (from Status 04-0)

Statuses 14-0 through 22-0 are manually assigned using from the Case Tools page. Choose the appropriate status from the drop-down menu and select OK. Navigate to the Case Approvals page to approve the status change.

Statuses 02-0 through 12-0, with the exception of status 06-0, and all closure statuses are automatically assigned through certain actions in IRSS.

TICKET TO WORK

Job Candidates between the ages of 18 and 64 who receive Supplemental Security Insurance (SSI) or Social Security Disability Benefits (SSDI) may have an assignable ticket under the Social Security Administration Ticket to Work program. Those job candidates with assignable tickets, by signing the IPE-2, give IVRS permission to put their ticket "in use." These ticket assignments are made through an electronic data exchange with the Social Security Administration. In order to exchange a job candidate's personal information, it is necessary that the job candidate's social security number and an affirmative answer to the **Job candidate gave permission on the Rights and Responsibilities to exchange information with SSA** field are entered on the application form in IRSS. If the job candidate did not provide this information and give approval on the IPE-1 at intake, every effort should be taken to collect these required elements when the IPE-2 is signed.

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Ticket assignment information is entered in IRSS through a batch process handled by Financial staff. IVRS field staff can view this information on the Ticket to Work page in IRSS. Ticket assignment information is also contained on the counselor's 510 Case Management report.

INDIVIDUAL PLAN FOR EMPLOYMENT REVIEW

A plan review is completed at minimum annually with the job candidate, but any time a change in the plan is necessary (eg: new employment goal, extending the goal date, adding service(s) or status change) an IPE-2 review form is needed. From the Case Forms page, select Add A New IPE-2 Plan Review Form.

The SOC Code and Code Description of the current employment goal along with the current Goal Date appear at the top of the page.

Employment Goal Category

If changed on the IPE, from the drop-down list, select the two-digit number representing the Standard Occupational Classification (SOC) major occupation group that matches the job candidate's employment goal.

Employment Goal

If changed on the IPE, from the drop-down list, select the SOC code that best represents the job candidate's employment goal.

Revised Goal Date:

If changed on the IPE, enter the eight-digit date or use the calendar option to select the new date by which the goal called for on the IPE is expected to be completed, including placement on a job and the ninety days of employment.

Based on the results of this review, your plan is:

From the drop-down list, make the appropriate selection:

- Continuing
- Changed
- Interrupted

Approval of an IPE review in the last 30 days is required to enter a status change to statuses 20-0, 22-0 and 24-0. If a new service is added while the case is in status 22-0 (employed), approval of a "Changed" IPE review form will reset the 90-day clock so long as the 90 days has not expired. If the 90-day clock has expired, the 90-day clock can be tracked outside of IRSS.

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Next Review Date:

Enter the eight-digit date or use the calendar option to select the date from the current IPE of the job candidate's next expected review of progress.

Save the IPE 3-Review/Amend page.

If additional services are needed or if service dates need to be extended, navigate to the Services Needed page by selecting the Services Needed button at the top of the page.

To amend the End Date for current services or the Provided or Arranged By information, select the Edit Service icon to the left of the service. Edit the information as directed by the IPE then select the Update List button.

If new services are needed, select the Add New Service button.

Services:

From the drop-down menu, select the service category.

To Begin:

Enter the eight-digit date or use the calendar option to select the date the service will begin.

To End:

Enter the eight-digit date or use the calendar option to select the date the service will end.

Provided or Arranged by:

Use the check boxes to select IVRS, Job candidate or Other. If Other is selected, in the text box provided enter the name of the individual and/or business that will provide or arrange for the service.

Select the Add to List button to add the service to the Services Needed grid. Repeat this process to add all new services included on the IPE review form.

Save and approve the form.

SERVICE AUTHORIZATIONS - PURCHASED SERVICES

Once services are entered on an IPE form, they are available to authorize for purchases necessary for the rehabilitation process. To create an authorization, navigate to the Case Services page and select the Add New Service Line Item button.

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Services Authorized Before Plan Development

Pre-IPE Case Status:

From the drop-down menu, select the status the job candidate is in at the time the service will be or was delivered. This list is restrictive to only the statuses included in the job candidate's case history.

Pre-IPE Service Category:

From the drop-down menu, select the Service Category that best describes the category of the service being authorized. This list is restrictive to only service categories that can be provided before plan development as outlined in regulations and policy.

Services Authorized After Plan Development

IPE Service Category:

From the drop-down menu, select the Service Category that best describes the category of the service being authorized. This list is restrictive to only service categories that are included on an IPE and can be provided after plan development as outlined in regulations and policy.

Service Line Item:

From the drop-down menu, select the service line item that best describes the service being authorized. This list is restrictive to only the services that can be provided under the Service Category selected. If the service line selected is an academic service, then additional fields for Grade Status and Term Name will display and will require data entry.

Vendor Name:

Select the magnifying glass icon to open the Vendor lookup window. Perform a search for the vendor, select the vendor in the Select Vendor list and click the Select Vendor button. If the vendor cannot be found in the vendor search, first check I-3 to see if the vendor is set up. If the vendor is in I-3, contact Financial to have the vendor added to IRSS. If the vendor is not in I-3, get a W-9 signed by the vendor then fax the W-9 to Financial to get them added to I-3 and IRSS. If authorizing to reimburse the job candidate, select Client Reimbursement as the vendor.

Start Date:

Enter the eight-digit date or use the calendar option to select the date the service will begin.

End Date:

Enter the eight-digit date or use the calendar option to select the date the service will end.

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Service Description:

Enter a description of the service being authorized or if the Service Line Item description is sufficient, select the Insert Service Line Description button.

Quantity:

Enter the quantity being authorized.

Unit Cost:

Enter the unit cost being authorized. If the Unit Cost field is grayed out, select the Recalculate button to display the pre-defined unit cost or to activate the field for data entry.

After all the fields are entered, save the Service Line form. When the Service Line Item Summary page displays, approve, authorize and, if needed, print the authorization.

Once a service line has been authorized, it will display on the Case Authorizations page. Amendments and cancellations of authorized services are performed from the Case Authorizations page using the Amend and Cancel buttons. Approval of authorization amendments are performed on the Case Services page. Once a service has been authorized under a service category, the category cannot be deleted from subsequent IPE forms.

BILLS/INVOICES

When an invoice or signed authorization is returned from the vendor, the billing is entered in IRSS. Navigate to the Bill/Invoices tab. Using Search or Find criteria, locate the appropriate authorization. The best data to use in locating the proper authorization is the authorization number. The authorization number can be found on the Case Authorizations page of the Case Dashboard or on the printed authorization form.

Select the Invoice icon on the left with a small green plus (+) sign in the lower right-hand corner to display the invoice entry screen. The authorization number, vendor name and job candidate's name will display at the top of the page.

Invoice Number:

Enter the invoice number from the invoice received from the vendor. If there is no invoice number or the vendor signed the billing portion of the authorization form, enter any information that will help the vendor connect the payment to the charges billed. Information entered in this field will print on the remittance notice that is sent to the vendor with the payment.

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Invoice Date:

Enter the eight-digit date or use the calendar option to select the date of the invoice received from the vendor. If the vendor signed the billing portion of the authorization form, enter the vendor's signature date.

Service Received Date:

Enter the eight-digit date or use the calendar option to select the date of service from the invoice or the signed authorization form. If the service was provided over a range of dates, enter the last date the service was provided. If the service was for medical records or a medical evaluation, the date the records or evaluation was received should be entered. If the dates of service cross the end of the state or federal fiscal years, the billings will need to be separated by fiscal years.

Invoice Received Date:

Enter the eight-digit date or use the calendar option to select the date the invoice was received. Typically the invoice will be date stamped when it is received in the IVRS office. If the invoice was not date stamped, enter the date the IVRS staff representative signs the invoice.

Select the icon under the Edit column to enter payment information. Payments in IRSS are based on the quantity and unit costs used to set up the service. Enter the Quantity that is being billed and the Total Amount will be calculate and populate in the total amount column. Select the green checkmark under the Edit column to update the Total Amount to the field above. Save and close the Invoice form. The original invoice and billing should be sent to Financial to complete the payment process. Copies of the documents are placed in the case file.

SERVICE AUTHORIZATIONS – DIRECT SERVICES

Direct services include services necessary to the job candidate's rehabilitation process that are provided by agency staff.

Navigate to the Case Service page and select the Add Direct Service button.

Area Office:

From the drop-down menu, select the appropriate area office of the agency staff member who performed the direct service.

Service Provider:

From the drop-down menu, select the name of the agency staff member who provided the direct service.

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Direct Services Before Plan Development**Pre-IPE Case Status:**

From the drop-down menu, select the status the job candidate was in at the time the service was delivered. This list is restrictive to only the statuses included in the job candidate's case history.

Pre-IPE Service Category:

From the drop-down menu, select the Service Category that best describes the category of the service being authorized. This list is restrictive to only service categories that can be provided before plan development as outlined in regulations and policy and required by RSA for reporting.

Direct Services After Plan Development**IPE Service Category:**

From the drop-down menu, select the Service Category that best describes the category of the service delivered. This list is restrictive to only service categories that are included on an IPE and can be provided after plan development as outlined in regulations and policy.

Service Line Item:

From the drop-down menu, select the service line item that best describes the service delivered. This list is restrictive to only the services that can be provided under the Service Category selected.

Service Received Date:

Enter the eight-digit date or use the calendar option to select the date the service was delivered.

If the service is Job-Tryout or Extended Evaluation Assessments, users will be required to enter a start date and end date for the service.

Start Date:

Enter the eight-digit date or use the calendar option to select the date the service began.

End Date:

Enter the eight-digit date or use the calendar option to select the date the service ended.

Service Description:

Enter a description of the service being authorized.

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COMPARABLE SERVICES AND BENEFITS

Enter up to three service providers who provided the job candidate with a comparable service or benefit. Three providers can be identified for each of the service categories listed on the job candidate's IPE or under the Assessment category as a pre-IPE service.

Navigate to the Case Services page and select the Add Comparable Benefits button.

Select Services Category:

From the drop-down menu, select the appropriate service category that best matches the service provided. The list is limited to service categories contained in the job candidate's plan for employment (IPE).

First Service Provider Type:

From the drop-down menu, select the provider type that best describes the service provider. Choices include:

- American Indian VR Services Program
- Centers for Independent Living
- Child Protective Services (Social Service Agency doing child protection work.)
- Community Rehabilitation Programs
- Educational Institutions (elementary/secondary)
- Educational Institutions (post-secondary)
- Employers
- Employment Networks (not otherwise listed)
- Federal Student Aid (such as, Pell grants, SEOG (Supplemental Educational Opportunity Grant), work study, etc.
- Intellectual and Developmental Disabilities Agencies
- Medical Health Provider (Public or Private)
- Mental Health Provider (Public or Private)
- One-stop Employment/Training Centers
- Public Housing Authority (Sec. 8 Housing/Low Rent or Rent Control Programs)
- Social Security Administration (Disability Determination Service or District office)
- State Department of Correction/Juvenile Justice
- State Employment Service Agency
- Veteran's Administration
- Welfare Agency (State or local government)
- Worker's Compensation
- Other VR State Agencies
- Other State Agencies
- Other Sources

If no comparable benefits or services were provided for the selected service category, choose the "No comparable services or benefits were provided" option.

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First Service Description:

Use this text box to further describe the vendor providing the comparable service or benefit and the service provided. If more than one vendor provided services to the job candidate for the service category listed, you may list them in the service description textbox; however, only one vendor is required for each provider type selected.

Second and Third Provider Types and Descriptions:

Repeat the steps above for the second and third providers. Once a service category or service provider type has been selected, it cannot be duplicated. These fields may be left unanswered if there were no more vendors providing comparable services and benefits to the job candidate.

Save the comparable benefit page to save the information entered to the Comparable benefits grid. Comparable benefits information may be updated or deleted using the Edit and Delete buttons. Once comparable benefits are added for a service category, the category cannot be deleted from subsequent IPE forms.

CLOSURE FORM (IPE-3)

To enter a closure form in IRSS, navigate to the Case Forms page of the job candidate's case record and select Add an IPE-3 Form.

Reason for Closure:

Achieved employment outcome (applicable only to 26-0 closures)

Unable to locate or contact

Use this code when the job candidate has relocated or left the State without a forwarding address.

Disability too significant to benefit from VR services - ineligible

Use this code to identify an applicant whose mental or physical disability is so significant that the individual cannot benefit from VR services in terms of employment.

No longer interested in receiving services or further services

Use this code for job candidates who choose not to participate or continue in their VR program at this time. Also use this code to indicate when an individual's actions (or non-actions) make it impossible to begin or continue a VR program. Examples would include repeated failures to keep appointments for assessment, counseling, or other services.

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Transferred to another agency

Use this code when a job candidate needs services that are more appropriately obtained elsewhere. Transfer to the other agency indicates that appropriate referral information is forwarded to the other agency so that agency may provide services more effectively. Include individuals transferred to other State VR agencies.

No disabling condition - ineligible

Use this code only for applicants who are not eligible for VR services because no physical or mental impairment exists, such as when the reported disability is an acute condition with no residual impairment, e.g., a broken bone that heals.

No impediment to employment - ineligible

Use this code for applicants who are not eligible for VR services because their physical or mental impairment does not constitute a substantial impediment to employment.

Transportation not feasible or available

Use this code to indicate that the job candidate was unable to accept or maintain employment because suitable transportation was either not feasible or not available.

Does not require VR services - ineligible

Use this code for applicants who do not require VR services to prepare for, enter into, engage in, or retain gainful employment consistent with their strengths, resources, priorities, concerns, abilities, capabilities, and informed choice.

Extended services not available

Use this code for job candidates who would have benefited from the provision of supported employment services but for whom no source of extended services was available.

All other reasons

This code is used for all reasons not covered above.

Extended employment

Use this code for job candidates who received services and were placed in a non-integrated setting for a public or non-profit organization. This closure reason cannot be used in Status 26-0.

Individual in institution other than a prison or jail

Use this code when a job candidate has entered an institution other than a prison or jail, and will be unavailable to participate in a VR program for an indefinite or considerable period of time. This category of institution includes hospitals, nursing homes, treatment centers, etc.

Individual is incarcerated in a prison or jail

Use this code when a job candidate will be unavailable to participate in a VR program for a considerable period of time because they are incarcerated in a prison, jail, or other criminal correction facility.

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The list of closure reasons that displays in IRSS is restricted to reasons that are viable options when considering the job candidate's current status. For example, ineligible codes will not display after presumptive eligibility or an eligibility form has been entered and approved.

Education Completed Category:

From the drop-down menu, select the level of education the job candidate had achieved by case closure. The level of education at closure must be the same as or above the level identified at application; therefore, only levels of education at or above the level entered on the application form will display.

- No formal schooling
- Elementary education (grades 1-8)
- Secondary education, no high school diploma (grades 9-12)
Use this category for job candidates who are attending high school but do not receive special education services under an IEP or 504 Plan.
- Special education certificate of completion/diploma or in attendance
This category is intended to capture individuals whose highest level of education is special education (answered "yes" to either the IEP or 504 questions). Use this category:
 - 1) *if the individual is currently a special education student,*
 - 2) *if the individual received special education and earned a certificate of completion or high school diploma, or*
 - 3) *if the individual received special education but did not receive a certificate/diploma.*
- High school graduate or equivalency certificate (GED)
Use this category for applicants who did not receive special education services and have earned a high school diploma or completed a GED or other high school equivalency program.
- Post-secondary education, no degree or certificate
- Post-secondary academic degree, Associate degree
- Vocational/Technical Certificate/Degree or License
- Bachelor's degree
- Occupational credential beyond undergraduate degree work
- Master's degree

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- Any degree above a Master's - e.g. Ph.D., Ed.D., J.D.
- Occupational credential beyond graduate degree work

Student with Disability in Secondary Education at Closure:

From the drop-down list, select the code that captures the status of an individual with a disability in secondary education at the time of closure.

- This individual is not a student with a disability in secondary education at the time of application.
- This individual is a student with a 504 accommodation plan.
- This individual is a student and is receiving services under an IEP at the time of application.
- This individual 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.

RSA Employment Status at Closure:

For a job candidate who achieved an employment outcome and the case record will close in status 26-0, select the code from the drop-down list that describes the employment outcome of the job candidate. If classifying the individual into two different employment statuses is possible, select a code designating the principal status.

Employment without Supports in Integrated Setting is full-time or part-time employment in an integrated setting without ongoing support services. For purposes of this report, this is work performed for wages, salary, commissions, tips, or piece-rates, below, at, or above the minimum wage. Do not include self-employed individuals.

Self-employment (except BEP) refers to 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.

State Agency-managed Business Enterprise Program (BEP) (USED WITH IDB/ISE CASES ONLY) refers to Randolph-Sheppard vending facilities and other small businesses operated by individuals with significant disabilities under the management and supervision of a State VR agency. Include home industry where the work is done under the management and supervision of a State VR agency in the individual's own home or residence for wages, salary, or on a piece-rate. Individuals capable of activity outside the home, as well as homebound individuals, may engage in such employment.

Homemaker refers to men and women whose activity is keeping house with no earnings for persons in their households or for themselves if they live alone.

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Unpaid Family Worker refers to persons who work without pay on a family farm or in a family business.

Employment with Supports in Integrated Setting is full-time or part-time employment in an integrated setting with ongoing support services for individuals with significant disabilities (supported employment). For purposes of this report, compensation for such employment may be below, at, or above the minimum wage.

Primary SOC Code Category:

For a job candidate who achieved an employment outcome, from the drop-down list select the two-digit number representing the Standard Occupational Classification (SOC) major occupation group that matches their primary employment.

Primary SOC Code:

From the drop-down list, select the SOC code that best represents the job candidate's primary employment.

For the employment situations unique to the VR program, use the special codes indicated below.

599999 Homemaker (own home) refers to men and women whose activity is keeping house for their families, or themselves if they live alone.

799999 Unpaid family worker (own family), not elsewhere classified use only if the type of unpaid family work cannot be classified according to any of the occupations.

899999 Randolph-Sheppard vending facility clerk use this category for persons employed as clerks, sales persons, or helpers in a vending facility operated under the Randolph-Sheppard Vending Facility Program. Use this special code even though these occupations are classifiable. Do not include vending facility operators (999999), or individuals employed in vending facilities outside the Vending Facility Program (use their occupation code). **This code is used for IDB/ISE cases only.**

999999 Randolph-Sheppard vending facility operator use this category for individuals employed as operators or managers of vending facilities operated under the Vending Facility Program. Use this special code even though these occupations are classifiable. Do not include vending facility clerks (899999), or individuals employed as vending facility operators outside the Randolph-Sheppard Vending Facility Program (use their occupation code). Randolph-Sheppard vending facility operator. **This code is used for IDB/ISE cases only.**

Save the Closure page then navigate to the Employment page to continue closing the case.

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Employment

Employment information is entered only for closures when the job candidate achieved an employment outcome and the case is closing in status 26-0.

Number of Jobs at Closure:

From the drop-down menu, select the number of separate jobs consistent with the employment goal on the job candidate's IPE and primary employment goal SOC code that the individual held at the time of closure. Wages and hours for jobs that are not consistent with the employment goal on the job candidate's IPE cannot be considered at closure.

Job Title:

Enter the job candidate's job title.

Employer Name:

Enter the name of the business or individual providing the employment opportunity. If the job candidate is working in more than one job/occupation matching their employment goal at the time of closure, enter the name of the business or individual that encompasses the majority of the job candidate's earnings per week.

Employer Address:

Enter the street address of the employer listed above.

State:

Enter the state in which the employer is located.

City:

Enter the city in which the employer is located.

Zip Code:

Enter the employer's zip code.

Hours per Week:

Enter the number of hours worked on all employment consistent with the employment goal on the job candidate's IPE. Enter the number of hours the job candidate worked for earnings in a typical week when the service record was closed. Earnings may have been in the form of wages, salaries, tips, commissions, profits from self-employment, adjusted gross income for salespersons, etc.

Wages:

Enter the amount of money (to the nearest dollar) the job candidate earned in a typical week after achieving an employment outcome consistent with the employment goal on their IPE, at the time the service record was closed and includes 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 individuals, and July 2014



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, etc.), to obtain a meaningful figure for a typical 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.

Under Per, enter whether the wages are earned Hourly, Weekly, Bi-Weekly, Twice a Month, Monthly or Annually. Select the Recalculate button and IRSS will automatically calculate the monthly wage.

Start Date of Employment in Primary Occupation:

Enter the eight-digit date or use the calendar option to select the date when the job candidate began employment. If the job candidate is working in more than one job matching their employment goal at the time of closure, enter the date he/she began employment in the job that encompasses the majority of the his/her earnings per week. For individuals who were employed at application, this date will be prior to the date of application. For each of the jobs that are consistent with the occupational goal on the job candidate's IPE and that will be used to calculate the weekly earnings and hours worked at closure, the VR Counselor must assure that the job candidate has been in stabilized employment for at least 90 days.

For each of the next five statements, select the checkbox next to the statement if it is true and consistent with the employment outcome:

- Services provided under your employment plan contributed to your employment goal.
- Your employment is consistent with your abilities and capabilities, and is your choice.
- Your employment is satisfactory and you are performing satisfactorily.

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- Employment pays at least minimum wage.
- Setting is integrated.

Supported Employment (SE) Closures

Supported Employment Goal:

For job candidates who had an employment goal of supported employment in their IPE at some point during their rehabilitation and received services under the plan intended to lead to the supported employment goal, indicate when the supported employment goal was included in the IPE. Note: The term "supported employment" means competitive work in integrated work settings, or employment in integrated work settings, in which job candidates are working toward competitive employment,

for individuals with the most significant disabilities who require intensive supported employment services in order to perform such work and extended employment supports to maintain such work.

- The individual had no supported employment goal identified in their IPE at any point during their rehabilitation.
- Initial IPE identified supported employment as the employment goal.
- The IPE was amended during the VR process to change the goal to supported employment.
- The IPE was amended during the VR process to change the goal from supported employment to another employment goal.
- The amended or final IPE identified supported employment as the employment goal only at the time the service record was closed.

Extended Service Provider:

If the closure type is Employment with Supports in Integrated Setting, long term supports must be identified. From the drop-down list, select the code that describes the extended service provider. If the closure reason is anything other than Employment with Supports in Integrated Setting, this field should be left unanswered.

Other Extended Service Provider:

If Other is chosen from the drop-down list under Extended Service Provider, in the textbox provided, enter the name of the extended service provider.

Post Employment Services

Select the checkbox next to the appropriate line indicating if or when post employment services are planned.

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- Not Applicable
- Not Anticipated, contact us if needed
- Planned for. If post-employment services are planned for, enter the eight-digit date or use the calendar option to select the date when post-employment services will begin.

Save the Employment page then navigate to the Monthly Support page to continue closing the case.

Monthly Support

Enter the monthly amount (to the nearest dollar) of public support received by the job candidate at closure from each of the following sources. If the job candidate did not receive any monthly public support, enter "0" for each type of public support. These fields may be left blank for closures when the job candidate cannot be located or contacted.

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. Also include any payments that are sent directly to the individual in an institution or to dependents on his/her behalf. Exclude any non-cash support payments such as Medicaid, Medicare, food stamps and rental subsidies. Categories of public support are as follows:

Social Security Disability Insurance (SSDI)

Enter the amount of SSDI received by the job candidate each month. This figure can be verified through the Social Security Administration (SSA) or from a copy of the job candidate's benefit notification letter.

Supplemental Security Income (SSI) for the Aged, Blind or Disabled

Enter the monthly payment to the job candidate 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 the SSA or from a copy of the job candidate'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. If the TANF payment is made to the family unit, use the local disbursing agency's procedure to estimate the job candidate's portion of the payment.

General Assistance (State or local government)

Veterans' Disability Benefits

Veterans' Disability Benefits are payments made by the Department of Veterans Affairs for partial or total disability.

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Workers' CompensationAll Other Public Support

Enter the monthly amount of public support received from all other sources of public support not listed. Other Public Support payments are cash payments to individuals beyond those otherwise listed, and include payments made by Federal, State and local governments for retirement or survivor benefits to the individual as well as unemployment insurance benefits and other temporary payments. If an amount is entered under Other Public Supports, specify the type of support in the the field provided.

Select the Recalculate button. IRSS will automatically total the benefit amounts.

Primary Source of Support:

From the drop-down list, select the code that indicates the job candidate's largest single source of economic support at the time the service record was closed, even if it accounts for less than one-half of the individual's total support.

- Employment Earnings
- Personal Income (interest, dividends, rent, retirement including social security)
- Family and Friends
- Public Support (SSI, SSDI, TANF, etc.)
- All other sources (e.g., private disability insurance and private charities)

Note: If a job candidate is supported by the earnings of a spouse, or by the spouse's unemployment insurance checks, identify Family and Friends as the Primary Source of Support and not Employment Earnings or Personal Income. If a job candidate is primarily supported by a governmental entity with no cash support – for example, incarcerated individuals, – use Public Support as the primary source of support only if the job candidate is the recipient of the support. If the family receives public support, use Family and Friends.

*RSA rescinded the separation of Employment Earnings from Personal Income after deployment of IRSS changes on 10/1/13. Employment Earnings and Personal Income are reported to RSA under one code in the background in IRSS.

Health Insurance:

From the drop-down menus, select Yes or No to indicate whether the job candidate had this type of medical insurance coverage at the time the service record was closed.

MedicaidMedicarePublic Insurance from Other Sources (Workers' Compensation, Children's Health Insurance Program, etc)

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Private Insurance Through Own Employer

Future Eligibility Through Own Employer

This code refers to job candidates who are not yet eligible for private insurance through their current employer, but will be eligible for private insurance after a certain period of employment.

Private Insurance through Other Means

This code refers to job candidates receiving benefits through their parent/family members' insurance plan.

Private Insurance Carrier

If Private Insurance through Other Means is indicated as a health insurance source, enter the Insurance Carrier name or source of the private insurance. If the carrier and source are not known, enter Unknown.

Save and approve the Closure Form. The case will automatically move to the appropriate closure status upon approval of the form.

Billings may be entered after closure for authorizations created before the case was closed. New service lines can be added to a closed case as long as the service is provided under a service category included on an IPE and entered in IRSS. New service lines should only be entered for services delivered while the case was open and inadvertently left unpaid at the time the case closed. If additional services are needed, the case should be reopened for post-employment services.

POST-EMPLOYMENT SERVICES

When it is determined that post-employment services are needed and the hard copy case file is available, a case can be reopened by entering, saving and approving a new IPE-3 form. Upon approval of the IPE, the case will automatically move to Status 32-0.

When a case is reopened for post-employment services:

- The application form is active for data entry; however, data that represents the the status of the case at the time of original application should not be altered or changed. Limit changes to those needed to update demographic and contact information necessary to provide post-employment services.
- Service lines for authorizations and no-cost services provided by IVRS staff can be created for any service categories entered on previous IPE forms or new service categories added at the time the case is reopened for post-employment services.

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- New comparable services and benefits can be entered, but benefit categories entered prior to the case being reopened can only be edited and not deleted.

Once services delivery is complete and the job candidate is stable in employment or it is determined that extensive services are needed beyond those that can be provided under post-employment, the case record can be closed by entering a new closure form.

To enter a new closure form, navigate to the Case Forms page of the job candidate's case record and select Add a Closure Form.

Reason for Closure:

From the drop-down menu, select the reason the case is closing:

- Closed from Post Employment Services, previous employment maintained
- Closed from Post Employment Services, case file reopened
- Closed from Post Employment Services, other outcome

Education Completed Category:

From the drop-down menu, select the level of education the job candidate had achieved when the case closed from post-employment services.

Student with Disability in Secondary Education at Closure:

From the drop-down list, select the code that captures the status of an individual with a disability in secondary education at the time the case closed from post-employment services.

Monthly benefits and health insurance information can be entered, but are not required to close a case from post-employment services.

Once the closure form is saved and approved, the case will automatically move to the appropriate closure status based on the reason for closure selection.

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