

IRSS Required Fields**Status 02-0 Applicant**

Application Form:

- First Name
- Last Name
- Office Assignment

(NOTE: Check the computer record by both applicant's name and Social Security Number to determine if there is a previously closed file.

- If there is a closed file, create an application to open a new case.**
- If there is a file closed within the past four fiscal years, it will be sent from closed files.)**

Status 06-0 Trial Work Experience/Extended Evaluation

Application Form:

- Living Arrangements
- Referral Source
- Student with Disability in Secondary Education
- Employment Status at Application; Employment Hours & Wages if status is an employed status (If the hours are less than one or wages less than \$3 per hour, additional fields will display for the job's SOC Code Category, SOC Code and Job Title.)

Case Services Page:

Authorizations, Direct Services and Comparable Benefits are added as they occur in this status.

Authorizations: (if IVRS is funding the service):

- Add a New Service Line
 - Pre-IPE Case Status
 - Pre-IPE Service Category
 - Service Line Item
 - Vendor Name (select client reimbursement, if applicable)
 - Start Date
 - End Date
 - Service Description
 - Quantity
 - Unit Cost

Save, authorize and bill the authorization, once provided.

August, 2014



Direct Services: (Services provided by IVRS staff)

- Add Direct Services for Job Tryout or Extended Evaluation
 - Area Office
 - Service Provider
 - Pre-IPE Case Status
 - Pre-IPE Service Category
 - Service Line Item
 - Service Start Date
 - Service End Date
 - Service Description (optional)

Comparable Benefits: (Services provided or funded by another agency)

- Add Comparable Benefit
 - Select Service Category (only assessment services are entered for RSA reporting before a plan is developed)
 - First, Second and Third Provider Types, as needed
 - First, Second and Third Service Descriptions, as needed.

Case Tools:

Status Change to Status 06-0; Approve the status change on Case Approvals page.

Status 08-0 from 02-0 Closed Before Acceptance**Application Form:**

- Date of Birth
- City
- Zip Code
- County
- Gender
- Marital Status
- Living Arrangements
- Race Fields
- Ethnicity Field
- Involvement With Other Agencies

Closure Form:

- Reason for Closure
- Education Completed Category
- Student with a Disability in Secondary Education at Closure
- Benefit Amounts, if known
- Primary Source of Support, if known
- Health Insurance Fields, if known

Status 08-0 from 06

Application Form (in addition to fields required for status 02-0 and 06-0):

- Date of Birth
- City

August, 2014



- Zip Code
- County
- Gender
- Marital Status
- Race Fields
- Ethnicity Field
- Involvement With Other Agencies
- Identification as an Individual with a Disabling Condition
- Benefit Amounts and Dates, if applicable
- Primary Source of Support
- Health Insurance Fields
- Education Completed Status
- Veteran/Military Status

Closure Form:

- Reason for Closure
- Education Completed Category
- Student with a Disability in Secondary Education at Closure
- Benefit Amounts, if known
- Primary source of Support, if known
- Health Insurance Fields, if known

NOTE: Two Trial Work Experience/job-tryouts must be entered either as direct services before a case can close in this status.

Status will automatically change when the closure form is saved and approved.

Status 10_ Accepted for Services

Status 04-0 Accepted for Services, Does Not Meet Severity Category Being Served

Application Form (in addition to fields required for status 02-0):

- Date of Birth
- City
- Zip Code
- County
- Gender
- Marital Status
- Living Arrangements
- Race Fields
- Ethnicity Field
- Referral Source
- Involvement With Other Agencies
- Identification as an Individual with a Disabling Condition
- Benefit Amounts and Dates, if applicable
- Primary Source of Support
- Health Insurance Fields

August, 2014



- Education Completed Status
- Student with Disability in Secondary Education
- Veteran/Military Status
- Employment Status at Application; Employment Hours & Wages if status is an employed status (If hours are less than one or wages less than \$3 per hour, additional fields will display for the job's SOC Code Category, SOC Code and Job Title.)

Eligibility Form:

- Primary Disability
- Primary Cause
- Secondary Disability
- Secondary Cause
- Waiting List Category

Select the highest category for which the individual qualifies. If the individual has only one disability, select No Impairment for the Secondary Disability and Secondary Cause.

Status will automatically change when the eligibility form is saved and approved.

Case Services Page:

Authorizations, Direct Services and Comparable Benefits are added as they occur in this status.

Authorizations: (if IVRS is funding the service):

- Add a New Service Line
 - Pre-IPE Case Status
 - Pre-IPE Service Category
 - Service Line Item
 - Vendor Name (select client reimbursement, if applicable)
 - Start Date
 - End Date
 - Service Description
 - Quantity
 - Unit Cost

Save, authorize and bill the authorization, once provided.

Direct Services: (Services provided by IVRS staff)

- Add Direct Services for Job Tryout or Extended Evaluation
 - Area Office
 - Service Provider
 - Pre-IPE Case Status
 - Pre-IPE Service Category
 - Service Line Item
 - Service Start Date

August, 2014



- Service End Date
- Service Description (optional)

Comparable Benefits: (Services provided or funded by another agency)

- Add Comparable Benefit
 - Select Service Category (only assessment services are entered for RSA reporting before a plan is developed)
 - First, Second and Third Provider Types, as needed
 - First, Second and Third Service Descriptions, as needed.

Status 12-0 Planning Completed

Application Form (in addition to services needed for previous statuses):

- Permission to Share Data with SSA

IPE-2 Form:

- Employment Goal Category
- Employment Goal
- Weekly Hours Work Goal
- Expected Completion Date
- Next Review Date
- Services Needed (repeat as needed to include all services)
 - Service Category
 - To Begin
 - To End
 - Provided or Arranged by
 - Services delivered by/Notes, if applicable
 -

Status will automatically change when the IPE-2 form is saved and approved.

NOTE: If a new program must be written, the case remains in its present status or moves to Status 24-0 until the new program is written.

Status 14-0 Counseling and Guidance

IPE Form:

Guidance and Counseling must be entered as a service needed on an IPE form.

Case Tools Page:

Status Change to Status 14-0; Approve the status change on Case Approvals page.

Case Services Page:

Authorizations, Direct Services and Comparable Benefits are added as they occur in this status.

August, 2014



Authorizations: (if IVRS is funding the service):

- Add a New Service Line
 - IPE Service Category
 - Service Line Item
 - Vendor Name (select client reimbursement, if applicable)
 - Start Date
 - End Date
 - Service Description
 - Quantity
 - Unit Cost

Save, authorize and bill the authorization, once provided.

Direct Services: (Services provided by IVRS staff)

- Add Direct Services for Job Tryout or Extended Evaluation
 - Area Office
 - Service Provider
 - IPE Service Category
 - Service Line Item
 - Service Start Date
 - Service End Date
 - Service Description (optional)

Comparable Benefits: (Services provided or funded by another agency)

- Add Comparable Benefit
 - Select Service Category (only assessment services are entered for RSA reporting before a plan is developed)
 - First, Second and Third Provider Types, as needed

First, Second and Third Service Descriptions, as needed.

NOTE: Enter Counseling and Guidance as Direct Service once the job candidate has received extensive guidance and counseling and the level of service exceeds that provided to all IVRS job candidates. Additional services may be provided in other service categories that support the employment goal included in the plan for employment. If a new program must be written, the case remains in its present status or moves to Status 24-0 until the new program is written.

Status 16-0 Physical Restoration

IPE Form:

Physical/Mental Treatment must be entered as a service needed on an IPE form.

Case Tools Page:

Status Change to Status 16-0; Approve the status change on Case Approvals page.

August, 2014



Case Services Page:

Authorizations, Direct Services and Comparable Benefits are added as they occur in this status.

Authorizations: (if IVRS is funding the service):

- Add a New Service Line
 - IPE Service Category
 - Service Line Item
 - Vendor Name (select client reimbursement, if applicable)
 - Start Date
 - End Date
 - Service Description
 - Quantity
 - Unit Cost

Save, authorize and bill the authorization, once provided.

Direct Services: (Services provided by IVRS staff)

- Add Direct Services for Job Tryout or Extended Evaluation
 - Area Office
 - Service Provider
 - IPE Service Category
 - Service Line Item
 - Service Start Date
 - Service End Date
 - Service Description (optional)

Comparable Benefits: (Services provided or funded by another agency)

- Add Comparable Benefit
 - Select Service Category (only assessment services are entered for RSA reporting before a plan is developed)
 - First, Second and Third Provider Types, as needed

First, Second and Third Service Descriptions, as needed.

NOTE: Additional services may be provided in other service categories that support a Physical Restoration plan. If a new program must be written, the case remains in its present status or moves to Status 24-0 until the new program is written.

Status 18- Training

IPE Form:

The training category appropriate for the training status must be entered as a service needed on an IPE form.

Case Tools Page:

Status Change to Status 18-X; Approve the status change on Case Approvals page.

August, 2014



Case Services Page:

Authorizations, Direct Services and Comparable Benefits are added as they occur in this status.

Authorizations: (if IVRS is funding the service):

- Add a New Service Line
 - IPE Service Category
 - Service Line Item
 - Vendor Name (select client reimbursement, if applicable)
 - Start Date
 - End Date
 - Service Description
 - Quantity
 - Unit Cost

Save, authorize and bill the authorization, once provided.

Direct Services: (Services provided by IVRS staff)

- Add Direct Services for Job Tryout or Extended Evaluation
 - Area Office
 - Service Provider
 - IPE Service Category
 - Service Line Item
 - Service Start Date
 - Service End Date
 - Service Description (optional)

Comparable Benefits: (Services provided or funded by another agency)

- Add Comparable Benefit
 - Select Service Category (only assessment services are entered for RSA reporting before a plan is developed)
 - First, Second and Third Provider Types, as needed

First, Second and Third Service Descriptions, as needed.

NOTE: Additional services may be provided in other service categories that support a Training plan. If a new program must be written, the case remains in its present status or moves to Status 24-0 until the new program is written.

Status 20-0 Ready for Employment

IPE Form:

An IPE-2 Review Form is required in the past 30 days to move a case to Status 20-0. Under 'Based on the review the plan is:' continuing must be selected.

Case Tools Page:

Status Change to Status 20-0; Approve the status change on Case Approvals page.

August, 2014



Case Services:

Authorizations, Direct Services and Comparable Benefits are added as they occur in this status.

Authorizations: (if IVRS is funding the service):

- Add a New Service Line
 - IPE Service Category
 - Service Line Item
 - Vendor Name (select client reimbursement, if applicable)
 - Start Date
 - End Date
 - Service Description
 - Quantity
 - Unit Cost

Save, authorize and bill the authorization, once provided.

Direct Services: (Services provided by IVRS staff)

- Add Direct Services for Job Tryout or Extended Evaluation
 - Area Office
 - Service Provider
 - IPE Service Category
 - Service Line Item
 - Service Start Date
 - Service End Date
 - Service Description (optional)

Comparable Benefits: (Services provided or funded by another agency)

- Add Comparable Benefit
 - Select Service Category (only assessment services are entered for RSA reporting before a plan is developed)
 - First, Second and Third Provider Types, as needed

First, Second and Third Service Descriptions, as needed.

NOTE: If a new program must be written, the case remains in its present status or moves to Status 24-0 until the new program is initiated.

Status 22-0 Employed

IPE Form:

An IPE-3 – Unless there is a change to the services needed then an IPE-2 would be required. Review Form is required in the past 30 days to move a case to Status 22-0. Under ‘Based on the review the plan is:’ continuing must be selected.

Case Tools Page:

Status Change to Status 22-0; Approve the status change on Case Approvals page.

August, 2014



Case Services Page:

Authorizations, Direct Services and Comparable Benefits are added as they occur in this status.

Authorizations: (if IVRS is funding the service):

- Add a New Service Line
 - IPE Service Category
 - Service Line Item
 - Vendor Name (select client reimbursement, if applicable)
 - Start Date
 - End Date
 - Service Description
 - Quantity
 - Unit Cost

Save, authorize and bill the authorization, once provided.

Direct Services: (Services provided by IVRS staff)

- Add Direct Services for Job Tryout or Extended Evaluation
 - Area Office
 - Service Provider
 - IPE Service Category
 - Service Line Item
 - Service Start Date
 - Service End Date
 - Service Description (optional)

Comparable Benefits: (Services provided or funded by another agency)

- Add Comparable Benefit
 - Select Service Category (only assessment services are entered for RSA reporting before a plan is developed)
 - First, Second and Third Provider Types, as needed

First, Second and Third Service Descriptions, as needed.

NOTE: In the event the job candidate loses employment, the case should be returned to Status 20-0 or 14-0 depending on past services received. If a new program must be written, the case should be moved to Status 24-0 until the new program is initiated. If additional services are needed, enter a new IPE-2 form and under 'Based on the review the plan is:' changed must be selected to reset the 90-day clock. If the 90 days have exceeded, the 90 days may be tracked outside of IRSS.

Status 24-0 Services Interrupted

IPE Form:

An IPE-2 Review Form is required in the past 30 days to move a case to Status 24-0. Under 'Based on the review the plan is:' continuing must be selected.

August, 2014



Case Tools Page:

Status Change to Status 24-0; Approve the status change on Case Approvals page.

Status 26-0 Closed Rehabilitated

Closure Form:

- Reason for Closure (must be 00-Achieved Employment Outcome)
- Education Completed Category
- Student with a Disability in Secondary Education at Closure
- RSA Employment Status at Closure (must be an employed status)
- Primary SOC Code Category
- Primary SOC Code
- Number of Jobs/Occupations at Closure
- Job Title
- Employer Name
- Employer Address
- State
- City
- Zip Code
- Hours Per Week
- Wages/Per
- Start Date of Employment in Primary Occupation
- Service provided under your employment plan contributed to your employment outcome checkbox, if applicable
- Your employment is consistent with your abilities and capabilities, and is your choice checkbox, if applicable
- Your employment is satisfactory and you are performing satisfactorily, if applicable
- Employment pays at least minimum wage, if applicable
- Setting is integrated, if applicable
- Supported Employment Goal, if applicable
- Extended Service Provider, if applicable
- Other Extended Service Provider Description, if applicable
- Appropriate Post Employment Services
 - Not Applicable
 - Not Anticipated, contact us if needed
 - Planned for (enter date)
- Benefit Amounts, if applicable
- Primary Source of Support
- Health Insurance Fields

Status will automatically change when the closure form is saved and approved.

August, 2014



Status 28-0 Closed After Plan Initiated

Closure Form:

- Reason for Closure
- Education Completed Category
- Student with a Disability in Secondary Education at Closure
- RSA Employment Status at Closure
- Supported Employment Goal, if applicable
- Extended Service Provider, if applicable
- Other Extended Service Provider Description, if applicable
- Benefit Amounts, if known
- Primary source of Support, if known
- Health Insurance Fields, if known

Status will automatically change when the closure form is saved and approved.

Status 30-0 Closed Before Plan Initiated

Application Form (in addition to fields required for status 02-0):

- Date of Birth
- City
- Zip Code
- County
- Gender
- Marital Status
- Living Arrangements
- Race Fields
- Ethnicity Field
- Referral Source
- Involvement With Other Agencies
- Identification as an Individual with a Disabling Condition
- Benefit Amounts and Dates, if applicable
- Primary Source of Support
- Health Insurance Fields
- Education Completed Status
- Student with Disability in Secondary Education
- Veteran/Military Status
- Employment Status at Application
- Employment Hours & Wages if status is an employed status (If hours are less than one or wages less than \$3 per hour, additional fields will display for the job's SOC Code Category, SOC Code and Job Title.)

Eligibility Form:

- Primary Disability
- Primary Cause
- Secondary Disability
- Secondary Cause
- Waiting List Category

August, 3014



Closure Form:

- Reason for Closure
- Education Completed Category
- Student with a Disability in Secondary Education at Closure
- Benefit Amounts, if known
- Primary Source of Support, if known
- Health Insurance Fields, if known

Status will automatically change when the closure form is saved and approved.

Status 32 Post Employment Services

IPE Form:

An IPE-2 Review Form is required in the past 30 days to move a case to Status 22-0. Under 'Based on the review the plan is:' continuing must be selected.

Status will automatically change when the IPE-2 form is saved and approved.

Status 33 Closed From Post-Employment Services

Closure Form:

- Reason for Closure
- Education Completed Category
- Student with a Disability in Secondary Education at Closure
- Benefit Amounts, if known
- Primary Source of Support, if known
- Health Insurance Fields, if known

Status 38-0 Closed from Status 04-0

Application Form (in addition to fields required for status 02-0):

- Date of Birth
- City
- Zip Code
- County
- Gender
- Marital Status
- Living Arrangements
- Race Fields
- Ethnicity Field
- Referral Source
- Involvement With Other Agencies
- Identification as an Individual with a Disabling Condition

August, 2014



- Benefit Amounts and Dates, if applicable
- Primary Source of Support
- Health Insurance Fields
- Education Completed Status
- Student with Disability in Secondary Education
- Veteran/Military Status
- Employment Status at Application
- Employment Hours & Wages if status is an employed status (If hours are less than one or wages less than \$3 per hour, additional fields will display for the job's SOC Code Category, SOC Code and Job Title.)

Eligibility Form:

- Primary Disability
- Primary Cause
- Secondary Disability
- Secondary Cause
- Waiting List Category

Closure Form:

- Reason for Closure
- Education Completed Category
- Student with a Disability in Secondary Education at Closure
- Benefit amounts, if known
- Primary Source of Support, if known
- Health Insurance Fields, if known

Status will automatically change when the closure form is saved and approved.

August, 2014

