

Eligibility and Closure Documentation

(Updated December 2011)
(Reviewed May 2014)

Purpose

To provide information about what documentation is required at eligibility and closure.

Rationale

To issue standard guidelines from which local teams can determine how to manage workload issues to complete the proper documentation during a case.

Eligibility & Rehabilitated Case Closures Documentation:

When documenting eligibility and successful case closure information in the case file, our federal regulations require that we include in the record:

- Documentation that a VRC determined that the applicant required services, as part of the eligibility decision.
- Documentation that the VRC and consumer agreed that the employment outcome was satisfactory and that the consumer was performing well on the job, as part of the closure decision.

The regulations say nothing about **who** needs to enter the above information into the case record.

Because our regulations are silent on this issue, any staff can enter the information in the case record **as long as there is documentation in the record that the VRC made the eligibility and closure determinations** as outlined above. It is not necessary for a VRC to enter an additional case note.

Case Closures:

Prior to closing a case in any status, the consumer needs to be provided the opportunity for full consultation.

- Multiple attempts / multiple methods of contact need to be made including the consumers ***preferred mode of contact*** and documented in IRIS.
- This mean contacting the consumer in his/her preferred mode of contact and at least one additional attempt using another method.

A CCC can close the case as long as there is documentation in the record that the VRC made the closure determination. It is not necessary for a VRC to enter an additional case note.

Local teams should determine how to implement this policy. When determining the process that will be used, consideration should be given to staffing levels and the comfort levels of staff performing these duties.