

**RSM 2
VR & IL POLICIES AND PROCEDURES MANUAL
SECTION 400**

REFERRAL & APPLICATION

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401 Community Outreach and Referral Source Development

DORS will develop and maintain relationships with organizations, agencies and persons in the community in order to obtain appropriate, timely referral of individuals with disabilities for rehabilitation services. DORS staff shall inform referral sources of:

- a. Services offered by DORS.
- b. The policies and procedures related to the Order of Selection/priority of services.
- c. Application requirements.
- d. The need to provide current medical, social, vocational and other pertinent information for determining eligibility and priority of services.

DOR staff shall also inform referral sources of the DORS website dors.maryland.gov and information available, including online referral. DORS brochures will be provided to referral sources and a DORS staff person will be assigned to serve as a liaison to the referral source as appropriate.

402 Referral Processes/Timeline

DORS will establish and maintain processes which ensure that referrals are accepted, assigned, and registered in AWARE™ promptly and equitably. For instance, an individual who has been referred or referred themselves online shall not be required to complete any additional referral forms.

402.01 Referral Documentation

The referral will be entered in AWARE™ when the referral is received, and the referral date entered in AWARE™ will coincide with the referral record (e.g., the date the office receives the on-line referral, or the date a liaison provides referral documentation, or the date a note is entered when a referral received by phone call or walk-in is entered directly into AWARE™).

402.02 Referral Response

- a. An accessible online referral instrument, located at dors.maryland.gov, will be utilized to facilitate processing of referrals to ensure consistent entry into AWARE™.
 1. Referrals received through the online instrument will be processed by Central Office and assigned to office supervisor/designee as identified by responses provided in referral instrument.
 2. Referrals will be reviewed by office supervisor/designee who then creates primary staff assignment.
 3. Referrals that are received by phone call or walk-in will be entered by DORS staff using the online referral instrument to maintain process integrity. Online referral entry shall not cause delay in scheduling initial interview.
 4. Individuals identified as eligible for Behavioral Health Administration (BHA) funded Supported Employment will follow process as established through DORS and BHA collaborative partnership (see **RSM 2, Section 804.01(a)1**).
- b. Within 10 working days of receipt of a referral, DORS staff will provide to the individual:
 1. The DORS brochure Opening Doors to Employment.
 2. A copy of the appropriate DORS application. Individuals referred for vocational rehabilitation services will receive the **DORS Intake Form (RS-1c)**. Individuals referred for Independent Living Older Blind (ILOB) services will receive the **Application for Independent Living Older Blind Services (RS-1L)**.
 3. Information about application procedures, determination of eligibility, presumption of eligibility for SSI and SSDI recipients, the Order of Selection/priority of service, and the need to provide available information substantiating the disability. (This may be presented verbally if the individual participates in intake activities within 10 working days of referral or may be included in a cover letter accompanying the information in 1, 2 and 3, above.)
- c. **Self-Referrals** – Referrals that are received by phone call or walk-in will be entered by DORS staff using the online referral instrument to maintain referral process integrity. Online referral entry shall not cause delay in scheduling initial interview.

When possible, DORS staff shall schedule an appointment for intake with a self-referred individual or an individual referred by a parent, guardian, or other legal representative, at the time that the referral is made. When this is not possible, DORS staff may attempt to contact the individual by telephone or email to arrange the appointment but must, regardless of the individual's responsiveness to that attempt, send an "Appointment for Intake" letter or email containing the required information and consistent with the timeline indicated in "a" above.

- d. **Third-party Referrals for Adults and Out-of-School Youth** – Consistent with the requirements indicated in "a" above, third-party referrals will be directed to online referral instrument located at dors.maryland.gov. Online referral instrument will provide a printable confirmation receipt of submitted referral.
- e. **Referrals for High School Students from School Officials** – Consistent with the requirements indicated in "a" above, referrals from school officials will be directed to online referral instrument located at dors.maryland.gov. Responses provided in online referral instrument will confirm school referral source has obtained parent/legal guardian consent for DORS referral for student with disability, before referral may be completed.
- f. **VR Referrals for Students with Disabilities with Open Pre-ETS Cases** – When a student with a disability has an open Pre-ETS case and expresses interest in applying for VR services, the referral record may coincide with the VR application date.
- g. **Closure of Referrals Prior to Application** – A referral record may be closed prior to DORS receiving an Application only if the individual declines to apply for services, or is unavailable to complete the application – **including failure to keep scheduled appointments** – and staff have made a reasonable number of attempts to contact the individual or individual's representative to arrange an initial interview (see **RSM 2, Section 1001.05**).
 - 1. If all required documentation is not provided or the referred individual, student with disability, or parent/legal guardian does not respond to a minimum of two DORS contacts documented in AWARE™, the referral may be closed.

Contacts will include an initial letter and two additional documented contact attempts including phone, email, or alternative method of communication as available.
 - 2. The referred individual, student with disability, or parent/legal guardian will be notified in writing, supplemented as necessary by appropriate modes of communication, indicating reason referral has been closed and provide information about how to re-apply.

403 Referral to Office for Blindness & Vision Services or Office of Field Services

- a. **Office for Blindness & Vision Services (OBVS):**
 - 1. All individuals who are legally blind are served by the Office for Blindness & Vision Services.
 - 2. Individuals who are deaf-blind who do not rely on American Sign Language are served by OBVS.
 - 3. Individuals whose only disability is a vision impairment but who are not legally blind are also served by OBVS.
 - 4. Individuals who require Independent Living Older Blind (ILOB) services are served by OBVS.
- b. **Office of Field Services (OFS)** – all other consumers are served by the Office of Field Services.

If, during the referral/application process it becomes apparent that the consumer would be more appropriately served by the other Office, the OFS regional director and OBVS supervisor shall facilitate the transfer consistent with **RSM 2, Section 311**.

404 Application Process

The print **DORS Intake Form (RS-1c)** and **Application for Independent Living Older Blind Services (RS-1L)** are available in both regular and large print for individuals who wish to complete a paper application. In such instances, the completed and signed Application form:

- a. Will be the official Application.
- b. Shall be date stamped (see **Section 404.01** below).
- c. Shall be scanned and attached in AWARE™.
- d. The original shall be maintained in the hard copy record of services, located at WTC Eligibility Determination Unit files.

404.01 Receiving a Completed Application Prior to Initial Interview

- a. When a completed and signed Application is received by the office, the date that it was received must be stamped on the hard copy application and recorded as the application date in the AWARE™ case management system. The application date will be the beginning of the 60-day timeframe to determine eligibility.
- b. When a completed and unsigned Application is received by the office, the date that it was received will be stamped on the hard copy and the date the consumer signs the application will be recorded as the application date in AWARE™.
- c. Completed applications received for high school students, minors (under age 18), or individuals with legal guardians must be signed by the individual's representative before the Application is considered complete and the application date entered in AWARE™.
- d. For information about the official application date for consumers referred by Psychiatric Rehabilitation Programs using the Maryland Public Mental Health System's case management system (not including ACT referrals), see **RSM 2, Section 804.01(a)(1)**.

404.02 Scheduling of Initial Interviews

- a. As soon as possible after referral or after receipt of an Application, an initial interview will be scheduled with the individual and, as appropriate, the individual's representative. As indicated above, the individual will be advised to bring all relevant medical, educational and employment information to the initial interview in order to expedite eligibility determination and, for those interested in Vocational Rehabilitation Services, assignment to an Order of Selection (priority) category (see **RSM 2, Section 500**).
- b. The initial interview may be conducted in a group setting or individually. A follow-up meeting will be arranged with the assigned DORS counselor if the initial interview was conducted by other DORS staff or in a group setting.
- c. The individual may bring a support person or persons (e.g., family member, friend, advocate) to the initial interview and subsequent meetings with DORS staff.
- d. Timeline for first meeting with assigned DORS counselor – The assigned counselor will make every effort to meet individually with the individual within 30 days of the date of referral or

receipt of an Application at a location and time mutually agreed to, whether or not such an individual meeting is preceded by group intake/orientation.

- e. Special needs, particularly those that would affect the exchange of information (i.e., need for translator, interpreter or alternate format), shall be addressed (see **RSM 1, Section 300**).
- f. All referrals for the vocational rehabilitation program will be given information regarding presumption of eligibility for SSI/SSDI recipients, and will be encouraged to bring verification of benefits to their initial interview. The DORS counselor shall pursue verification of benefits through established procedures, as appropriate (see **Section 406.12**).
- g. See **RSM 2, Section 804.01** for information about referrals who are eligible for Behavioral Health Administration-funded Supported Employment.

404.03 New Cases Resulting From Appealed Case Closure Decisions

In the event that a consumer files a written appeal or otherwise requests to have a case reopened within 60 days of being notified of the case closure decision and DORS agrees to reopen the case, the Agency will use the most expeditious method possible to resume services:

- a. If the case closure data has not yet been reported to RSA, the consumer's closed case will be reopened.
- b. If the case closure data has already been reported to RSA, the DORS counselor will immediately:
 - 1. Create a referral and new case for the consumer
 - 2. Enter the date the Agency agreed to reopen the consumer's case as the application date for the new case without requiring the consumer to complete and sign new application packet materials.
 - 3. Use the application materials, assessment information, and, if applicable, Individualized Plan for Employment, in the previous case to move the consumer's new case into the status from which the previous case was closed without requiring the consumer to sign this documentation again.

405 Application Packet

Information shall be provided to each applicant at the time of application including at a minimum the following:

- **DORS Intake Form (RS-1c) or Application for Independent Living Older Blind Services (RS-1L)**
- Brochures:
 - **Client Assistance Program (CAP)**
 - **Informed Choice**
 - **Opening Doors to Employment**
- Disclosures:
 - **Professional Disclosure Statement (RS-1m)**
 - **Notification Regarding Protection of Personal Information (RS-2d)**

Other forms, brochures, fact sheets and information may be added as needed.

406 Initial Interview: Establishment of a Counseling Relationship

DORS counselors shall develop a collaborative relationship with each applicant and eligible individual and will promote the individual's full involvement and participation in the rehabilitation process. The counselor, in consultation with the consumer, shall determine what supports are needed for the consumer to fully participate in the counseling relationship and rehabilitation program, and assure provision of the identified supports.

Establishment of a working alliance with the consumer will be facilitated by listening to the consumer's views of their interests, hopes, plans, concerns and priorities, and by review of the information reported on the Application. The DORS counselor's role in providing information about and guiding the individual in exploration of options is critical to supporting informed choice of the individual.

The DORS counselor will provide encouragement, support and assistance with problem solving and clarification of values, as well as information about referral to community resources, and coordination of services. The goal, either employment or independence, will be emphasized in contacts with the individual throughout the rehabilitation process.

- **Initial Interview Documentation** – The initial interview discussion with the DORS counselor shall be documented by completing the required **Initial Interview/Intake Checklist (RS-1r)**. The **Initial Interview/Intake Checklist (RS-1r)** shall demonstrate establishment of the counseling relationship by including, at a minimum, a description of the individual's disability and functional limitations, the discussion regarding the individual's work history and job interest, and next steps for the DORS counselor and the applicant.
- **Professional Disclosure Statement** – As part of establishing a collaborative relationship with the consumer, during the initial interview the DORS counselor shall provide the consumer a **Professional Disclosure Statement (RS-1m)** and review its contents.
- **Notification Regarding Protection of Personal Information** – The DORS counselor shall review the **Notification Regarding Protection of Personal Information (RS-2d)** with the consumer, emphasizing the importance of encrypting emails containing confidential information (see **Section 308, Communication with Consumers**).
- **Career Counseling** – For individuals in the VR program, the focus of the counselor-consumer alliance shall be career counseling. The DORS counselor shall make every effort to engage the applicant/eligible individual early in the process through mutually agreed on activities, e.g., use of interest inventories, visits to employment sites, use of resources to access online employment information to explore and confirm employment options.

During initial contacts, the applicant and/or applicant's representative will also be advised of the following:

406.01 Available Services

DORS staff shall explain the rehabilitation process, including eligibility criteria and presumption of eligibility for SSI/SSDI beneficiaries and individuals who are eligible for BHA- or DDA-funded supported employment, and services available through DORS. Relevant brochures will be provided to the individual if not previously provided, and the counselor shall refer the individual to the [DORS website](#).

406.02 Emphasis on Employment/Independence

If the individual is applying for VR services, DORS staff shall emphasize at the initial meeting and in subsequent contacts that the primary objective is the achievement of competitive integrated employment. If the individual is applying for ILOB services, staff shall emphasize that the primary objective is improvement in the ability to function independently.

406.03 Non-discrimination

DORS staff shall notify the individual verbally and in writing (through provision of DORS brochures) that the Maryland State Department of Education, Division of Rehabilitation Services does not discriminate on the basis of age, ancestry/national origin, color, disability, gender identity/expression, marital status, race, religion, sex, or sexual orientation in matters affecting employment or in providing access to programs and activities.

406.04 Informed Choice

DORS staff shall provide individuals a copy of **Informed Choice**, review its contents, and emphasize that applicants and eligible individuals may make choices throughout the rehabilitation process from among available, realistic options. This includes assessment activities, the employment goal, services and providers.

DORS staff shall provide information and support services to applicants and eligible individuals, particularly individuals with cognitive disabilities, using appropriate modes of communication, to enable and enhance informed choice.

- a. The exercise of informed choice by an applicant or eligible individual, particularly an individual with a cognitive disability, requires close collaboration and effective communication between the counselor and the individual, or the individual's representative, as appropriate.
- b. Effective communication is necessary in terms of information sharing and the identification of options and the parameters associated with each option, which serve as the basis for appropriate decision-making on the part of the individual.
- c. The DORS counselor shall be aware of and responsive to the learning style of the individual, particularly an individual with an intellectual or cognitive disability, mental illness, acquired brain injury or specific learning disabilities.
- d. In general, an individual with a cognitive disability can comprehend information and make appropriate decisions if provided suitable supports and assistance either directly by the counselor or through a knowledgeable and qualified third party.

It should be noted, however, that a statement of the individual's preferences does not require that DORS either approve or fund them if they are inconsistent with policy.

406.05 Rights and Responsibilities

Staff shall inform individuals in the appropriate mode of communication of:

- a. Their rights, including the Appeal Process, availability of the Client Assistance Program and Confidentiality. (This information will be provided verbally and through the provision of **Client Assistance Program (CAP)** and **Opening Doors to Employment** brochures.)
- b. Any responsibility of the individual or family for financial participation in the cost of services to be arranged or provided.
- c. The right and responsibility to fully participate in the selection of the:
 1. Employment or independent living goal.
 2. Services required to meet the goal.
 3. Providers of services.

406.06 Required Signatures

DORS staff shall explain that if the individual is in high school, a minor (i.e., not yet 18 years of age), or has a legal guardian, all forms requiring signature of the applicant or eligible individual, including but not limited to the following shall be signed by the individual's representative.

- **DORS Intake Form (RS-1c) or Application for Independent Living Older Blind Services (RS-1L)**
- **Consent for Disclosure of Information (RS-2b)**

A minor with a documented history of substance abuse will be advised to obtain the required signatures in order to be considered an applicant for DORS services. DORS staff shall not disclose the minor's substance abuse to any person, including the minor's parents, guardian, or representative, without the written consent of the minor, in accordance with federal alcohol and drug abuse confidentiality regulations (see **RSM 2, Section 202.02**). See **Section 406.09** and **RSM 2, Section 501.01(d)** for additional information about substance abuse and eligibility for rehabilitation services.

406.07 Order of Selection/Priority of Services

For individuals interested in Vocational Rehabilitation services, DORS staff shall explain the Order of Selection policy and the priority categories (see **RSM 2, Section 500**).

406.08 Financial Participation

Staff shall explain DORS policy and procedures related to financial need and participation, use of comparable benefits, and litigation (see **RSM 3, Section 1400** and **Section 1300**; **RSM 1, Section 800**, respectively). It shall be emphasized that DORS will pay for only those services that have been pre-approved and authorized in writing by a DORS official. (See **Section 601.01, Financial Participation**.)

406.09 Substance Abuse Issues

While substance abuse in and of itself is not an impairment for purposes of eligibility for public rehabilitation services, individuals eligible for services based on an impairment or combination of impairments (see **Attachment 400-1**) may have co-existing substance use issues.

When an applicant indicates they have a diagnosis or medical history of substance-related addiction, including alcohol, or that they use medical cannabis/marijuana or there is documentation in the case record supporting such a diagnosis or history, the DORS counselor shall review with the applicant the **Substance Use Information Sheet (RS-1d)**, have the applicant sign and date the sheet and provide a copy to the individual. The DORS counselor shall discuss with the individual the history of substance/alcohol use, obtain available documentation, and discuss current treatment and activities that support abstinence and recovery.

It is important for the DORS counselor to emphasize the need for the individual to remain abstinent from substance abuse while receiving DORS services and in recovery, and to follow-up with the applicant about substance use issues while undertaking assessment to determine eligibility and rehabilitation needs. The **Meeting Follow-up letter** in AWARE™ shall be used as appropriate to confirm understandings and results of meetings with the individual. Follow-up shall be documented on Case Notes.

Medicinal Cannabis – A patient's use of medicinal cannabis/marijuana is equivalent to when patients use any other drug prescribed by a physician, including narcotic or psychotropic drug which would otherwise be illegal without a doctor's prescription. Patients qualified to use cannabis for medical purposes will have been issued a Patient Identification Card (ID card) by the Maryland Medical Cannabis Commission (MMCC). These individuals cannot be subject to arrest, prosecution, or any civil or administrative penalty, and cannot be denied any right or privilege, due to the medical use of cannabis per MD Code, Health - General, § 13-3313, and shall not be required to demonstrate to

DORS that they are abstinent from or in recovery from marijuana or be required to participate in treatment.

While it is likely that individuals issued a MMCC Patient ID card will carry it, it is not required that they carry the card with them at all times. Therefore, a DORS counselor shall accept an individual's self-report that he/she has been issued a MMCC Patient ID card, and shall not ask to see it. However, DORS counselors shall advise these individuals that they should be prepared to provide verification (e.g., show a MMCC Patient ID Card to DORS/WTC staff or a doctor's note), if requested, when citing "medicinal cannabis" as the reason for positive drug screenings.

406.10 Need for Information

Staff shall explain the need for information related to determination of eligibility and assessment of rehabilitation needs, and financial participation; and the emphasis on self-reporting and obtaining existing information. The procedure for obtaining existing information from other sources through use of the **Request for Confidential Information (RS-2a)** form will be described.

The **Request for Information – Workers' Compensation Commission (RS-4I)** will be completed for applicants who are Workers' Compensation Commission claimants in order to expedite the sharing of relevant existing information.

The Information Gathering statement related to the collection and dissemination of information, as stated on the **DORS Intake Form (RS-1c)** and **Application for Independent Living Older Blind Services (RS-1L)**, shall be discussed.

406.11 Application for Services

DORS staff shall describe the application process. If the completed and signed Application was not previously received by the office, staff will request that the individual or the individual's representative complete the application process in AWARE™ and sign and submit a print copy of the Application or assist the DORS counselor in completing Application information via AWARE™ and signing the AWARE™-generated print copy, if interested in receiving rehabilitation services. (In the unusual event that completion of the application form would be burdensome or delay provision of services, the individual may provide the equivalent information instead of the form itself.) DORS staff shall emphasize that completion of an Application including a request for vocational rehabilitation services confirms the individual's intention to achieve a competitive integrated employment outcome.

The print **DORS Intake Form (RS-1c)** and the **Application for Independent Living Older Blind Services (RS-1L)** are available for individuals who wish to complete a paper form, in both regular and large print. In such instances, the completed and signed Application form will be the official Application, with a copy maintained in the hard copy record of services. DORS staff shall take information from submitted print applications and enter it into AWARE™.

The DORS counselor will provide the applicant with a copy of the signed Application and retain the original in the hard copy record of services.

The individual will be advised that, unless eligibility is presumed (SSI/DI recipients; individuals eligible for BHA-funded supported employment), eligibility will be determined within 60 days beginning when the completed and signed Application was received by DORS.

(In extenuating circumstances beyond the control of DORS it may take longer than 60 days to obtain needed information to support eligibility; the DORS counselor may request that the applicant agree to a specific extension of the timeframe to determine eligibility. However, it is not appropriate to discuss this possible eventuality at the time of application since the counselor has not yet had an opportunity to demonstrate a sustained, good-faith effort to obtain the information. If the DORS counselor is not able to obtain the information after documented efforts to do so for approximately 45 days, it would then be appropriate to discuss an extension with the applicant. See **RSM 2, Section 502.**)

406.12 SSI/DI Verification for Presumption of Eligibility and Order of Selection

During the initial interview, the DORS counselor shall advise the applicants for the vocational rehabilitation program that SSI and SSDI recipients are generally presumed eligible. The counselor shall be proactive in pursuing verification of the applicant's benefit status, as follows:

- a. If an individual reporting receipt of SSI and/or SSDI provides verification (i.e., copy of award letter, check or Ticket to Work), the DORS counselor shall determine eligibility and move the individual's case to eligible status in AWARE™ as soon as possible and no later than 60 days from the application date, unless a trial work experience plan has been implemented.
- b. If an individual reporting receipt of SSI and/or SSDI has not provided verification, i.e., copy of award letter or check or Ticket to Work, the Social Security Programs Unit shall:
 1. Ensure that the case is processed through the automated SVES benefits verification and AWARE™ is updated with benefit type and amount, within approximately 10 days of the case's entry into AWARE™.
 2. Ensure that if an error is identified in the SVES automated batch processing, the Social Security Programs Unit will coordinate with the DORS counselor to inform of the error and assist in its correction (for example, correcting name, DOB, SSN, etc.).
- c. SSI and SSDI recipients automatically meet requirements for assignment to Category 2, Significant Disability. However, rather than assigning the individual to Order of Selection Category 2 and, consequently, to the DORS waiting list, strictly on the basis of this automatic presumption, the DORS counselor shall use up to but no more than 60 days from the date of the application, if necessary, to obtain additional documentation and assess whether a determination of Most Significant Disability is warranted (see **RSM 2, Section 503**).
- d. Additional information gathered while an individual is in delayed status may justify reassignment from Category 2 to Category 1, consistent with established procedures (see **RSM 2, Section 503.02**).
- e. While the Rehabilitation Act allows for the possibility that an individual who receives SSI and/or SSDI may be "incapable of benefiting in terms of an employment outcome from vocational rehabilitation services due to the severity of the disability," counselors are encouraged to convey and act in accordance with an optimistic belief that individuals even with the most significant disabilities can work if provided needed supports. Use of trial work to develop clear and convincing evidence of inability to benefit due to severity of the disability should be considered only on a very exceptional basis (see **RSM 2, Section 501.01**).

406.13 Voter Registration

DORS staff are required by law to facilitate the voter registration process for applicants for DORS services.

The **DORS Intake Form (RS-1c)** form includes a question to indicate if the individual would like to "apply to register to vote today."

The **Voter Registration Form (RS-1xx)** is available on InDORS and also as a form in the AWARE™ letters catalog for use should a consumer wish to update their voter status at any time.

- a. DORS supervisors shall assure that **Voter Registration Application** forms are available on display in the waiting area of all DORS offices. An accessible **Voter Registration Application** form has been posted to InDORS.

- b. If the individual indicates an interest in registering to vote, the DORS counselor shall provide the **Voter Registration Application** form to the individual and shall offer assistance in completing and/or mailing the form.
- c. Completed Voter Registration Application forms left for DORS staff to mail shall be mailed promptly. Each mailing of Voter Registration Application forms will include an **Agency-Based Registration Voter Registration Transmittal Form**, available on InDORS.
- d. It is the responsibility of the State Board of Elections to process **Voter Registration Applications** and forward voter registration cards to the applicant. If an individual advises DORS staff that they have not received the voter registration card, they shall be referred to the State Board of Elections, 1-800-222-VOTE or elections.maryland.gov.

406.14 Assistive Technology

Applicants will be asked if they currently use assistive technology. Advantages of assistive technology will be described and discussed.

406.15 SSI/SSDI Beneficiaries

- a. **Benefits Planning** – Benefits Planning services are an important part of career decision making for consumers who already receive SSI and/or SSDI. Benefits planning services are not designed for individuals who wish to apply for SSI/SSDI. (Individuals who wish to apply for SSI and/or SSDI should be referred to their local Social Security Administration office or 800-772-1213.) See **RSM 2, Section 719** for additional information about benefits counseling services.

Work incentives offer an effective means for individuals who receive Social Security disability benefits to plan for a time when they can discontinue benefits and still have health coverage and earn far more than they would receive if they continue on SSA cash benefits alone. It is important for DORS consumers who are SSI and/or SSDI beneficiaries to begin receiving benefits planning services from experts in the field early in the rehabilitation process and maintain these supports throughout the process, so that they have the opportunity to make informed choices about future employment and their benefits. Individuals with this knowledge are more likely to become fully engaged in their rehabilitation plans from the outset and to work up to their full potential rather than just enough to stay on benefits.

Through benefits planning services, individuals have the supports necessary to address benefits-related concerns as they arise, rather than having their career progress derailed by unforeseen events, and so will likely achieve greater levels of self-sufficiency and independence. See the "Menu of Individualized Services" in the **Benefits Planning Desk Reference (RS-1n)** for a complete description of these services.

Eligible individuals who are SSI/SSDI beneficiaries and are on the DORS waiting list may request benefits counseling services at no charge through the [Maryland Work Incentives Network](http://MarylandWorkIncentivesNetwork.org) (MD-WIN Contact Information: 240-638-0071; 1-888-838-1776 toll free; innow.org/md-win) or through fee-for-service "General Benefits Consultation" (see **RSM 2, Section 719.01**).

For DORS consumers not currently affected by the waiting list, see **RSM 2, Section 719.04**.

- b. **Ticket to Work** – For applicants who indicate that they receive Supplemental Security Income (SSI) or Social Security Disability Insurance (SSDI) benefits or have a Ticket to Work, the DORS counselor shall:
 - 1. Confirm whether they are familiar with Ticket to Work, whether they have a Ticket, and if they have a Ticket, whether it has been assigned and to whom (through coordination with DORS Social Security Programs Unit).

2. If the Ticket is assigned to an EN or other state VR agency, contact the DORS Social Security Programs Unit for guidance.
3. If the applicant brings in their Ticket, make a copy for the record and return the original to the applicant.
4. Provide a **DORS Ticket to Work Fact Sheet (RS-1f)** describing the program, and review with the individual.
5. Review **Partner Employment Networks (EN)** on the DORS public website, and inform the applicant that, once employed, DORS may assist Ticket holders by referring them to Partner ENs for services which may then continue beyond successful DORS case closure.

407 Review of Information/Self Report

The assigned DORS counselor will meet with the individual to discuss information related to background, career aspirations, preferences, capabilities, limitations, accommodations, assistive technology needs and other matters related to employment and/or independence. They will jointly review the **DORS Intake Form (RS-1c)** and any supporting documentation..

If there are indications in the review of information and during the interview that the individual may have problems with substance abuse and this has not been disclosed to the DORS counselor, these concerns will be discussed and a standardized screening instrument will be used as appropriate. Consideration will be given to referral for a substance abuse assessment. The **Substance Abuse Assessment (RS-4j)** form may be forwarded to the provider to document results of the assessment.

408 Information and Referral Services

Consistent with DORS' commitment to informed consumer choice, DORS staff will provide accurate information and guidance, using appropriate modes of communication, to applicants and eligible individuals regarding vocational rehabilitation. DORS staff will refer applicants and eligible individuals to other appropriate Federal and State programs, including other components of the Statewide Workforce Investment System, best suited to meet their specific employment needs.

408.01 Referral Requirements

Referrals must include a written notice to the individual including:

- a. Identification of a specific point of contact within the agency to which the individual is being referred.
- b. Information and advice regarding the most suitable services to assist the individual to prepare for, secure, retain or regain employment.

408.02 Information and Referral—Delayed Status (Waiting List)

Information and referral services must be provided to individuals found eligible for services but who do not meet Order of Selection/priority of services criteria (see **RSM 2, Section 500**). The "Delayed Status" letters in AWARE™ include information about referrals to other entities that might assist the individual in achieving employment.

408.03 Information and Referral – Extended Employment

DORS staff must refer to local extended employment providers (community rehabilitation programs) individuals with disabilities who make an informed choice to pursue extended employment (non-

integrated employment) as their employment goal. (This referral requirement applies to individuals with disabilities who appear to have the capability to pursue supported or competitive employment but decide instead to work in a non-integrated setting.) Before making the referral, DORS staff shall:

- a. Explain to the individual that the purpose of the vocational rehabilitation program is to assist individuals to achieve competitive employment in an integrated setting.
- b. Provide the individual with information concerning the availability of employment options, and of vocational rehabilitation services, in integrated settings, as appropriate.
- c. Inform the individual that services under the vocational rehabilitation program can be provided to eligible individuals in an extended employment (non-integrated) setting as part of assessment or other interim step in preparing for employment in an integrated setting.
- d. Inform the individual that if they initially decide to work in extended employment, they can seek services from DORS in the future if they decide to pursue competitive integrated employment.
- e. Refer the individual, as appropriate, to Benefits Planning Services in order to obtain information concerning the ability of individuals with disabilities to work while receiving benefits from the Social Security Administration.

409 Continuation of Counseling and Guidance throughout the Rehabilitation Process

As indicated in **Section 406**, DORS counselors will develop a collaborative relationship with each applicant and eligible individual and will promote the individual's full involvement and participation in the rehabilitation process. The DORS counselor shall continue to provide support and guidance, and ongoing career counseling for those in the VR program, throughout the rehabilitation process to assess progress, address issues, and make modifications in plans as needed.

The DORS counselor will monitor the individual's progress in IPE or ILP services and document progress in Case Notes. In addition, the counselor will discuss significant delays in service initiation or progress and discuss alternatives as appropriate. The record will reflect that the individual was advised of any delays and options presented, as appropriate, via Case Note or FYI and Response letter in AWARE™.