

RSM 2
VR & IL POLICIES AND PROCEDURES MANUAL
SECTION 700

REHABILITATION SERVICES

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701 Requirements for Rehabilitation Service Provision

Rehabilitation services will be provided as follows:

- a. Services will be provided, as appropriate:
 1. To determine eligibility and rehabilitation needs
 2. In accordance with a **Trial Work Experiences Plan**
 3. In accordance with an approved **Individualized Plan for Employment (IPE)**
 4. In accordance with an **Independent Living Plan (ILP)**
- b. Medical and allied medical services will be provided based on the recommendation and written prescription, as appropriate, of a licensed physician or other authorized health care professional. The record of services of the individual shall contain copies of recommendations for treatment, prescriptions, and reports of progress or outcome of treatment.
- c. Services will be purchased only from professionals licensed or certified according to state law and approved by DORS (see **RSM 3, Section 1007**).
- d. Services will be provided in accordance with DORS financial need policy and purchasing procedures (see **RSM 3, Section 1000** and **Section 1100**, respectively).
- e. Services on the **IPE/ILP** which have been initiated will continue to be provided to an individual who has requested an appeal hearing unless the individual, or the individual's representative, as appropriate, requests that they be discontinued or the services have been obtained through fraud, collusion, or criminal conduct on the part of the individual.

Requests for 1) initiation of specific services on the **IPE/ILP** which have not yet been started, and/or 2) additional services not on the **IPE/ILP** which support the rehabilitation goal and are unrelated to the subject of the appeal shall be referred to the regional director or designee for consultation and direction (see **RSM 1, Section 304**).

702 Excluded Services

Rehabilitation services will be provided in keeping with **Section 701**. Services which shall not be provided include the following:

- a. **Long-term medical services** – Medical rehabilitation services, including treatment for acute conditions, health maintenance needs and routine replacement and repair of appliances, will not be provided. When such services are needed, the DORS counselor shall initiate the development of a plan for community-based provision of health services which may be needed by the individual after the record of services has been closed.
- b. **Facilitated communication** – including purchase of technology and related training.
- c. **Surgical procedures** – Certain surgical procedures will not be authorized by DORS. These exclusions include but are not limited to the following:
 1. Sterilization
 2. Abortions
 3. Operative or other medically prescribed procedures for sex change
 4. Organ transplant
- d. **Purchase of land and buildings** – see **RSM 2, Section 1603**.
- e. **Purchase of vehicles which require a license to operate, and certain vehicle modification services** – see **RSM 2, Section 1604**.

703 Scope of Vocational Rehabilitation Services

Vocational rehabilitation (VR) services are any services described in an approved **IPE** or necessary to assist an individual with a disability in preparing for, securing, retaining or regaining an employment outcome consistent with the strengths, resources, priorities, concerns, abilities, capabilities, interests and informed choice of the individual, including:

- a. **Assessment for determining eligibility and priority for services** – by qualified personnel including, if appropriate, an assessment by personnel skilled in rehabilitation technology.
- b. **Assessment for determining vocational rehabilitation needs**.
- c. **Vocational counseling and guidance** – including information and support services to assist an individual in exercising informed choice.
- d. **Referral and other services** necessary to help applicants and eligible individuals secure needed services from other agencies and to advise those individuals about the Client Assistance Program (CAP).
- e. **Diagnosis and treatment of physical and mental impairments**, including:
 1. Corrective surgery or therapeutic treatment that is likely, within a reasonable period of time, to correct or modify substantially a stable or slowly progressive physical or mental impairment that constitutes a substantial impediment to employment.
 2. Diagnosis and treatment of mental and emotional disorders by a physician or licensed psychologist in accordance with State licensure laws; and treatment of mental and emotional disorders by a licensed, clinical social worker or licensed clinical professional counselor.

3. Necessary hospitalization (either inpatient or outpatient care) in connection with surgery or treatment and clinic services.
4. Prosthetic, orthotic or other assistive devices, including hearing aids.
5. Eyeglasses and visual services, including visual training, and the examination and services necessary for the prescription and provision of eyeglasses, contact lenses, microscopic lenses, telescopic lenses, and other special visual aids prescribed by a physician skilled in the diseases of the eye or by an optometrist, whichever the individual may select.
6. Special services for the treatment of individuals with end-stage renal disease, including transplantation, dialysis, artificial kidneys, and supplies.

See **Section 705** for additional information about provision of medical rehabilitation services.

- f. **Vocational and other training services** – including personal and vocational adjustment services, books, tools, and other training materials, except that no training or training services in an institution of higher education (universities, colleges, community or junior colleges, vocational proprietary schools, technical institutes, or hospital schools of nursing) may be paid for with DORS funds unless maximum efforts have been made by the individual to secure grant assistance in whole or in part from other sources to pay for that training.
- g. **Interpreter services** for individuals who are deaf and tactile interpreting services for individuals who are deaf-blind.
- h. **Reader services, rehabilitation teaching services, and orientation and mobility services** for individuals who are blind.
- i. **Job-related services** – including job search and placement assistance, job retention services, follow-up services and follow-along services.
- j. **Self-employment services** – including technical assistance and consultation services related to self-employment, telecommuting and small business ownership.
- k. **Supported employment services.**
- l. **Post-employment services** necessary to assist individuals to maintain, regain or advance in employment.
- m. **Occupational licenses, tools, equipment, initial stocks and supplies.**
- n. **Rehabilitation technology services (RTS)** – including architectural and vehicle modifications, telecommunications, sensory and other technological aids and devices.
- o. **Transition services** for students with disabilities.
- p. **Other goods and services determined necessary** for the individual with a disability to achieve an employment outcome.
- q. **Support services** – The following services may only be provided while an individual is receiving other VR services as specified in an **IEP**:
 1. Maintenance for additional costs, over and above normal living expenses, incurred while participating in VR services.
 2. Transportation, including training in the use of public transportation vehicles and systems.

3. VR services to family members of an applicant or eligible individual if necessary to enable the applicant or eligible individual to achieve an employment outcome.
4. On-the-job or other personal assistance services.

704 Scope of Independent Living Services

Independent living (IL) services are any goods or services necessary to assist an individual in becoming more independent. Independent living core services are primarily provided through Centers for Independent Living, which are community based private non-profit agencies designed and operated within the local community by and for individuals with significant disabilities.

IL services are provided by DORS through the Independent Living Older Blind (ILOB) program, where the primary objective of services is to improve the ability of the individual to function, continue functioning or move toward functioning independently in the family or community (see **RSM 2, Section 505.01** for ILOB eligibility requirements).

704.01 Independent Living Core Services

IL Core Services consist of:

- a. Information and referral services
- b. IL skills training
- c. Peer counseling, including cross-disability peer counseling
- d. Individual and systems advocacy

704.02 Independent Living Services Provided by the Independent Living Older Blind Program

ILOB services include the IL core services and:

- a. Services to help correct blindness, such as:
 - Outreach services
 - Visual screening
 - Treatment to prevent, correct or modify disabling eye conditions
- b. Provision of eyeglasses and other visual aids.
- c. Provision of services and equipment to assist an older individual who is blind to become more mobile and more self-sufficient.
- d. Mobility training, Braille instruction, and other services and equipment to help an older individual who is blind adjust to blindness.
- e. Guide services, reader services, and transportation necessary for assessment or in support of services reflected on **ILP** (see **RSM 2, Section 605**).
- f. Any other appropriate service designed to assist an older individual who is blind in coping with daily living activities, including supportive services and rehabilitation teaching services.
- g. IL skills training, information and referral services, peer counseling, and individual advocacy training.
- h. Other IL services that may be necessary to improve the ability of an individual with a significant disability to function, continue functioning, or move toward functioning independently in the

family or community or to continue in employment and that are not inconsistent with any other provision of the Rehabilitation Act, as amended.

705 Medical Rehabilitation Services – Policy and Procedures

Medical rehabilitation services to be included on an approved **Trial Work Plan, IPE** or **ILP** must be consistent with the following conditions:

705.01 Dental Treatment

Dental treatment/services will be purchased only when there is the existence of serious maxillofacial problems and/or disease of the gums that may cause or aggravate specific health problems.

705.02 Glasses, Optical Aids, Artificial Eyes and Visual Services

Glasses, optical aids and artificial eyes will be purchased only when prescribed by an ophthalmologist or an optometrist, whichever the individual may select. Glasses which correct an individual's vision to 20/20 may be purchased only if required during assessment or in conjunction with other rehabilitation services as specified on the **IPE** or **ILP**.

An item not manufactured to prescription (e.g., closed circuit television, magnifiers, etc.) will be purchased only if recommended by a low vision specialist, clinic or rehabilitation technologist. A copy of the related report will be placed in the record.

705.03 Hearing Aids

Hearing aids may be purchased only if an individual requires the hearing aids to obtain/retain employment or to participate in an approved training program, and the individual has had an audiological evaluation indicating the need for a hearing aid. In cases of ear pathology, an otologic evaluation is also required. A copy of all reports must be placed in the record of services.

Hearing Aid Evaluation reports are to include the following elements and format:

- **Background history, if available** – Brief Narrative
- **Statement of hearing disability** – Brief Narrative
- **Hearing Aid benefit** – Brief Narrative
- **Specific Hearing Aid and ear mold recommendations** – Manufacturer, specific model, style, color, custom modifications, material type where applicable.

DORS counselors are responsible for providing the **Hearing Aid Fact Sheet (RS-6f)** to consumers and for applying any comparable benefits to the cost of services, such as funds from the consumer's health insurance plan (e.g., fully-insured health plans, HMOs, non-profit health service plans, Medicaid, Medicare, Veterans) and assistance from an outside non-profit organization, to defray the cost of audiological services. Providers who accept Medicaid can be found at: [Provider Lookup](#).

- a. **Batteries** – If the hearing aid has a rechargeable internal battery, the purchase of the related charging station is allowable. If the hearing aid has a disposable battery, a one-time purchase of a pack of batteries is allowable. After the initial purchase of batteries or the related charging station, consumers are responsible for purchasing batteries.

At the DORS counselor's discretion, and with supervisory approval, additional batteries may be purchased for consumers who have limited financial resources and who demonstrate/document an inability to purchase batteries on their own. Such purchases by DORS are limited to those consumers who follow through on the services listed on their **IPE**.

- b. **Warranty Payment** – DORS will not purchase service contracts or "extended warranties" for hearing aids.
- c. **Frequency of Hearing Aid Purchases** – With proper care and maintenance, the typical life expectancy of hearing aids is five to seven years. Sometimes, a consumer may need new hearing aids before this time period is up. Some of the acceptable reasons for replacing the consumer's hearing aids prematurely may include:
- Rapidly progressive hearing loss may require a change to more powerful hearing aids or a higher level of hearing aid technology that isn't available within their current hearing aids.
 - Through no fault on the consumer's part, the hearing aids are no longer repairable.
 - A change in the consumer's vocational goal that necessitates a change in hearing aid technology.

DORS staff should also consider purchasing electronic devices and/or other low-technology devices that are designed to extend the life of the hearing aid(s) (e.g., sweat covers, hearing aid dryers, and cases). DORS staff must determine whether DORS should purchase hearing aids, accessories, and other equipment on an individual basis based upon the aforementioned factors and consistent with the needs of each individual consumer.

DORS staff are to request hearing aid care and maintenance documentation, such as receipts, from the consumer when an additional hearing aid purchase is requested.

Purchase of additional hearing aids before six years requires Regional Management approval.

- d. **Hearing Aid Repairs** – Before making the decision to replace the consumer's broken or malfunctioning hearing aid, a dispenser familiar with the particular aid should evaluate the consumer's hearing aid. If the hearing aid is determined by an audiologist or hearing aid fitter to require repair, DORS must first determine if it is still under warranty and use the warranty to pay for any repairs. The repair cost should be documented with either a letter by the audiologist or hearing aid fitter. If the aid cannot be repaired, a complete diagnostic evaluation must be provided as part of the process to replace the hearing aids.

705.04 Hospitalization

Services provided in a hospital will be purchased only in conjunction with surgery, treatment or, in selected cases, as an evaluation procedure. When hospitalization is recommended, the counselor will obtain from the physician an estimate of the number of days hospitalization will be required and the services to be provided. The record will contain an official hospital report (discharge summary or similar reports). (See **RSM 3, Section 1100** regarding preparation of authorizations for hospitalization.)

705.05 Medical Care: Inter-current Illness

Medical care for inter-current illnesses may be provided by DORS only when acute illnesses or injuries occur during the course of an individual's rehabilitation program and which, if not cared for, would complicate or delay the individual's program.

705.06 Nursing Services

Nursing services will be purchased only when required during hospitalization, as specified in **Section 705.04** and recommended by the attending physician.

705.07 Orthotic Devices

Orthotic devices will be purchased only when recommended and prescribed by a physician. A copy of the written prescription will be placed in the record.

705.08 Physical and Occupational Therapy

Physical and occupational therapy may be purchased only on a time-limited basis to achieve specific goals associated with employment and/or independence. Such therapy will be purchased from licensed individuals or facilities and requires a prescription from a physician, a copy of which will be placed in the record.

705.09 Prescription Drugs

Prescription drugs, excluding medical cannabis, may be purchased on a time-limited basis when recommended by a physician and when there is a demonstrated need for prescription drugs in the achievement of the rehabilitation goal. Marijuana remains illegal under federal law and DORS funds cannot be used to purchase medicinal cannabis/marijuana.

The DORS counselor shall thoroughly explore and document availability of comparable benefits for prescription drugs, including Medicaid, pharmacy assistance, and programs sponsored by pharmaceutical manufacturers to provide medication to persons unable to afford it. In instances when DORS is paying for prescription drugs, the record of services will contain a fax or other copy of the prescription and documentation of verification (see **RSM 3, Section 1004(a)**). Generic drugs must be purchased unless the physician indicates otherwise.

705.10 Prosthetic Devices

Prosthetic devices will be purchased to assist an individual to function independently. The following procedures apply:

- a. Before authorization of a prosthetic device, the individual will be examined by an orthopedist, a physiatrist or a physician specializing in internal medicine.
- b. Individuals with amputations resulting from Diabetes, Buerger's Disease, or other circulation disorders will be examined by a physician specializing in internal medicine before a prosthesis is authorized.
- c. Individuals will be referred to approved prosthetic clinics after the medical examination is complete.
- d. A prescription with specifications and cost of the prosthesis will be obtained from the clinic prior to the provision of the prosthesis. A copy of the prescription will be placed in the individual's record of services.

705.11 Psychotherapy

Psychotherapy will be purchased for an individual by DORS on a time-limited basis and only when the following conditions are met and documented in the record:

- a. A written recommendation from a psychiatrist or licensed psychologist is obtained.
- b. It is neither possible nor feasible for the individual to receive mental health services from community programs.
- c. The psychotherapy is provided by a psychiatrist; licensed psychologist; licensed, clinical social worker; or licensed, clinical professional counselor.
- d. The condition is stable or slowly progressive and correction or modification may reasonably be expected to eliminate or reduce the impediment to employment or independence.

705.12 Speech and Hearing Therapy

Medically directed speech and hearing therapy will be purchased from a licensed specialist to improve or eliminate the individual's disabling condition. A copy of the specialist's report shall be placed in the record of services.

705.13 Surgical and Medical Treatment

- a. Surgical and medical treatment shall require a written report, including recommended procedures and CPT codes, by a licensed physician. (See surgery exclusions, **Section 702.**)
- b. It is the responsibility of the physician to discuss with the individual the recommended procedures, implications, risks and expected results.

705.14 Surgical Appliances

Surgical appliances will be purchased only when prescribed by a physician. A copy of the written prescription will be placed in the record.

705.15 Wheelchairs

Wheelchairs will be purchased only when prescribed by a physiatrist or other physician, or by a licensed physical or occupational therapist. A copy of the written specifications for the wheelchair signed by an authorized prescriber will be placed in the record of services.

706 Services Related Primarily to Sensory and Cognitive Disabilities – Policy and Procedures

The following services may be provided consistent with an approved **Trial Work Plan, IPE, or ILP.**

706.01 Assistive Aids and Devices

Telecommunications, sensory and other assistive technological aids and devices which are commonly obtained on the basis of a prescription will be purchased by DORS only with individualized prescriptions and fittings and only from licensed, approved professionals. Technical assistance will be obtained from DORS Rehabilitation Technology Services (RTS) staff whenever experimental aids or devices are being considered for purchase.

706.02 Auxiliary Aids

The Division will provide required auxiliary aids, including but not limited to interpreter services, tactile interpreting services, reader services and note taking services, to individuals when needed as reasonable accommodations to derive full benefit from DORS programs (see **Section 706.03**). Interpreter services for applicants and eligible individuals who are deaf and tactile interpreting for applicants and eligible individuals who are deaf-blind will be provided through approved community agencies/providers.

706.03 Auxiliary Aids/Reasonable Accommodations in Institutions of Higher Education

Institutions of post-secondary education are required by Section 302 of the Americans with Disabilities Act (ADA) to provide auxiliary aids and services ("reasonable accommodations") to ensure that no individual with a disability is excluded from or denied the services provided by the institution. Consistent with the ADA, institutions of post-secondary education are responsible to identify, provide and fund educationally related, in-class reasonable accommodations/access to course content for students with disabilities, based on documented need and policies of the institution.

DORS will, as appropriate, provide or arrange reasonable accommodations for out-of-class use in support of the educational program, such as reader services needed to complete homework assignments in a dormitory or at home.

DORS will consider providing funding for educationally-related, in-class auxiliary aids/reasonable accommodations only:

- a. If the institution makes it a matter of public record that provision of reasonable accommodations would be an “undue administrative or financial burden,” and
- b. With the approval of the regional director or designee (see **RSM 2, Section 1500** and **RSM 3, Section 1005**).

Every effort shall be made to assure timely provision of required reasonable accommodations so as to avoid a delay in the eligible individual's training program.

706.04 Orientation and Mobility

Orientation and Mobility (O&M) training necessary for individuals with visual impairments to travel outside the home will be provided by an approved and certified O&M Specialist in accordance with the Vendor Fee Schedule.

O&M assessments and/or training can only be provided by certified O&M Specialists. This means the individual shall have at a bachelor's degree from an accredited college or university and have completed one of these two nationally recognized O&M Certifications:

- a. Hold a certificate as a Certified Orientation and Mobility Specialist (COMS) from the Academy for Certification of Vision Rehabilitation and Education Professionals (ACVREP).
- b. Hold a National Orientation and Mobility Certification (NOMC) from the National Blindness Professional Certification Board (NBPCB).

706.05 Rehabilitation Teaching Services

DORS rehabilitation specialists (teachers of the blind) will be responsible for providing rehabilitation teaching services. Services may also be purchased from approved community providers. If a rehabilitation teaching assessment and/or services are purchased from a certified teacher, the fee is higher.

A certified teacher means the individual holds a certificate as a Certified Vision Rehabilitation Therapist (CVRT) from the Academy of Certification of Vision Rehabilitation and Education Professionals (ACVREP). There is a different fee for teachers who do not hold a national certification.

706.06 Supplies for Individuals who are Blind

Basic supplies such as canes and Braille books will be provided to individuals who are blind at no cost when used for assessment and/or rehabilitation teaching services. When such supplies are for vocational training, they will be provided in accordance with the DORS financial need policy and procedure.

706.07 Visual Training

Visual training will be purchased only when recommended by an ophthalmologist or optometrist to correct orthoptics or pleoptics, and for treatment of amblyopia, and only when the condition can be corrected or modified in a reasonable amount of time. Visual training may also be purchased for the use of optical aids or for increased visual efficiency such as in orientation and mobility training. A copy of the report will be placed in the record of services.

706.08 Vocational Rehabilitation Support Services for the Deaf-Blind

Support Services Provider (SSP) services provide access to community and vocational rehabilitation services that a Deaf-Blind individual may not normally be able to obtain. SSPs are specially trained professionals who enable people who have combined vision and hearing losses (Deaf-Blind) to access their environments and make informed decisions.

a. Purchase of VR Support Services

1. DORS counselors may purchase VR Support Services, which are SSP services directly related to vocational rehabilitation or employment services (e.g., for a deaf-blind consumer to attend DORS-sponsored and/or approved medical appointments, DORS-approved meetings, peer support groups, meetings with job coaches/CRPs, on-the-job trainings, O&M, workshops, career training and career assessments).
2. The OBVS Deaf-Blind Services Staff Specialist coordinates all requests for VRSS services, based on a description of the need and a request from the DORS counselor documented in a case note in AWARE™ and an email request to the Staff Specialist.
3. VRSS are purchased from approved community providers consistent with **RSM 5, Section 206.04**.

b. **Duties of the SSP** – Duties include providing visual/auditory environmental information to the consumer, providing guiding in the community, and facilitating communication in settings where an interpreter is typically not present.

c. **Duties the SSP may not perform** – The duties of the VRSS/SSP are described in (b) above. Duties the VRSS/SSP **may not** be engaged to provide for a DORS consumer include the following:

1. Provide transportation only.
2. Act as a rehabilitation counselor, job coach, O&M instructor, rehabilitation teacher, assistive technology or Braille instructor.
3. Perform chores such as housekeeping, maintenance, repairs, gardening, or moving furniture.
4. Provide personal care services such as bathing, cooking, banking, nursing, laundering, etc.
5. Interpret extensively or provide communication access in settings that would normally require the use of a professional interpreter such as in medical or legal settings.
6. Make decisions for the consumer based on the opinions of the SSP.
7. Handle money in any way.
8. Execute personal, marital or relationship counseling.
9. Discipline or take care of the consumer's children or other family members.

706.09 Rehabilitation Communication Specialist Services for the Deaf or Hard of Hearing

Rehabilitation Communication Specialists (RCSs) are vendors who have an American Sign Language Proficiency Interview (ASLPI) credential or have obtained a minimum 3+ or higher proficiency rating as assessed by Gallaudet University, have completed the Association of Community Rehabilitation Educations (ACRE) "Basic Employment Services Certificate of Achievement," and have demonstrated

experience communicating with employers and advocating for consumers. Additionally, RCS vendors will be required to participate in at least four hours of professional training a year related to Job Placement services in order to maintain "approved vendor" status with DORS.

At the direction of the DORS counselor (RCD) and consistent with a signed agreement with DORS, these vendors provide job placement and employment follow-up support for individuals who are deaf or hard of hearing singly or in combination WTC Employment Services, Business Services Representatives, and CRPs, as below.

a. **Purchase of RCS services:**

1. DORS counselors may purchase RCS job development services singly or in combination with services provided by WTC employment services or Business Service Representatives.
2. DORS counselors may purchase RCS onsite follow-up services or RCS onsite communication support for a Pre-ETS WBLE singly or in combination with CRP short-term or intensive job coaching services.
3. DORS counselors may purchase RCS services singly or in combination with Vocational Interpretation Services (**Section 706.10**), as requested by the consumer or RCS.
4. DORS Deaf & Hard of Hearing Services Staff Specialist reviews/approves vendor applications, ensures the vendor has completed a Cooperative Agreement, and provides technical assistance to RCDs and RCSs, as needed.
5. RCS services are purchased from approved vendors consistent with **RSM 5, Section 208.01**.

b. RCS services include the following activities, consistent with the DORS counselor's referral and authorization:

1. **Intake and Planning** (not to exceed two hours) – Meet with the consumer and referring DORS counselor to determine the consumer's employment and communication needs and to develop consumer's objectives, consistent with the IPE.
2. **Job Development Preparation** (not to exceed eight hours) – As required, resume and cover letter preparation and interview preparation.
3. **Job Development** – May include preparation and practice of interviewing skills, role play, job placement, and communication support throughout the interview and placement process, and assistance with On-the-Job Training (OJT) coordination in partnership with the DORS regional business services representative.
4. **Onsite Follow-Up** (onboarding, training, and on-the-job mentoring, support and problem resolution) – May be provided when a consumer initially achieves employment for the purpose of stabilizing the employment. Hours initially authorized should be based on the Job Coaching Fading Schedule (**RSM 2, Attachment 800-3**) available prior to transition to natural supports. Administrative Approval required to exceed this number.
5. **Job Retention Evaluation** (work environment and culture, communication styles and information sharing, reasonable accommodations employee relationships, organizational support, employee growth potential, employee/consumer production) – May be provided after employment stability has been achieved and the employment stable date has been entered in AWARE™ to address a specific concern related to performance and/or job retention.

6. **Job Retention Onsite Follow-Up** – This service may be provided as an additional support to regain employment stability when the job retention evaluation results in an Action Plan requiring onsite follow-up. Prior to authorization, the consumer's employment record must not include a Stable Date.
 7. **Onsite Communication Support During WBLE** – May be provided for students with disabilities during a work-based learning experience. Hours authorized should be based on the Short-Term Job Coaching Fading Schedule (**RSM 2, Attachment 800-3**). Administrative approval required to exceed this number.
- c. **Duties the RCS may not perform** – The duties of the RCS are described in (b) above. Duties the RCS **may not** be engaged to provide for a DORS consumer include the following:
1. Provide transportation only.
 2. Act on behalf of the DORS counselor.
 3. Interpret extensively or provide communication access in settings that would normally require the use of a professional interpreter such as in medical or legal settings.
- d. **Reporting requirements** – Progress reports must be submitted with monthly invoices, noting when RCS services are provided in collaboration with CRPs, BSRs, or Vocational Interpretation Services providers (**Section 706.10**).
- e. **Employment Stability** – Other than Job Retention Evaluation, no other RCS service may be provided once the consumer agrees that employment stability has been achieved and the employment stability date has been entered in AWARE™. If an Action Plan developed during the job retention evaluation requires onsite follow-up, the employment will be considered stable only after the consumer verifies that the Action Plan has been fulfilled.
- f. **Incentives** – RCS vendors are eligible for Placement Incentives (**RSM 2, Section 915**).

706.10 Vocational Interpreter Services for the Deaf or Hard of Hearing

Vocational Interpreters (VI) are credentialed by either the Registry of Interpreters for the Deaf (RID), National Association of the Deaf (NAD), or the Interpreter Training Program (ITP). At the direction of the DORS counselor (RCD) and consistent with a signed agreement with DORS, these vendors provide interpretation, as needed, during training, job development and employment follow-up support for individuals who are deaf.

- a. **Purchase of VI services:**
1. DORS Deaf & Hard of Hearing Services Staff Specialist reviews/approves vendor applications, ensures the vendor has completed a Cooperative Agreement, and provides technical assistance to RCDs and vocational interpreters, as needed.
 2. VI services are purchased from approved providers consistent with **RSM 5, Section 208.02**.
- b. VI services include the following activities, consistent with the DORS counselor's referral and authorization:
1. **Job Development Preparation (e.g., mock interviewing)** – in combination with services provided by either WTC employment services, Business Service Representatives, RCS, or CRPs.
 2. **Onsite Job Interview Assistance** – in combination with services provided by either WTC employment services, Business Service Representatives, RCSs, or CRPs.

3. **Onsite Vocational Interpretation (e.g., during informational interviews with employers, job fairs, short-term training or supervisory meeting)** – singly or in combination with services provided by either WTC employment services, Business Service Representatives, RCS, or CRPs.
 4. **Onsite Vocational Interpretation during Pre-ETS Work-Based Learning Experience** – singly or in combination with services provided by either WTC employment services, Business Service Representatives, RCS, or CRPs. Hours authorized should initially be based on the Short-Term Job Coaching Fading Schedule (**RSM 2, Attachment 800-3**). Administrative Approval required to exceed this number.
- c. **Reporting Requirements – Vocational Interpreter Logs (RS-7u)** must be submitted with the invoice on a monthly basis. The VI shall provide a signed **Vocational Interpreter Log (RS-7u)**, including date, business name and address, start and end time, individuals present, and any relevant comments. The log must be signed by the consumer.
 - d. **Employment Stability** – VI services shall not be provided after a consumer agrees that employment stability has been achieved and the Employment Stable Date has been entered in AWARE™.

707 Home Modifications – Policy and Procedures

See **RSM 2, Section 1603**.

708 Desktop and Portable Computers – Policy and Procedures

Desktop and portable computers and associated hardware the software may be provided for the following purposes, considering availability of a loan or a purchase under certain conditions.

708.01 Purpose

Desktop and portable computers and associated hardware and software may be provided as:

- a. Adaptive equipment (see **RSM 2, Section 1602, Assistive Technology**); or
- b. Off-the-shelf (non-adaptive) equipment:
 1. To support a consumer attending an institution of post-secondary education consistent with an approved **IPE** (see **RSM 2, Section 1508.01**); or
 2. To be used as business equipment consistent with the requirements of an approved business plan (not adaptive) (see **RSM 2, Section 1400, Self-Employment**); or
 3. To be used as equipment for home-based employment, upon documentation of the skills of the individual and commitment of the employer, including projected hours and earnings.

708.02 Loan/Rental/Donation Programs

The counselor will explore whether required microcomputers and associated hardware and software are available to the individual through a loan, rental or donation program and will assist the individual in securing a loaner, rental or donation when feasible. This is particularly applicable to consumers who are in a provisional semester in post-secondary education because there are questions about their ability complete the post-secondary program.

708.03 Purchase

Regional fiscal associates and other assigned staff shall coordinate with DORS RTS staff for the purchase of non-adapted computers and software. RTS will work with OFS and OBVS field staff in developing:

- a. Specifications, consistent with individual needs and requirements of the school.
- b. Ordering information for non-adapted computers, via Service Authorization (AWARE™ WTC Category/subcategory: RTS Assessment/AT Assessment).

RTS consultation shall be requested as soon as possible prior to the beginning of the semester (up to four months prior is preferred).

709 Vehicle Modification Services - Policy and Procedures

See **RSM 2, Section 1604**.

710 Vehicle Repair

There may be instances when repairs are needed to the vehicle of an individual who is receiving services and the counselor has determined that:

- a. The service will substantially and directly support the individual's rehabilitation goal;
- b. The cost of repairs does not exceed the value of the vehicle; and
- c. No other source exists to finance the needed repairs.

In such instances, the record of services, with a justification summary, will be forwarded via supervisory channels to the OFS/OBVS Director or designee, who may authorize the specific repair services when they explicitly support the individual's rehabilitation goal.

711 Job Placement Services

See **RSM 2, Section 900, Employment Services**.

712 Self-Employment Services and Home-Based Employment Services

- a. **Self-Employment Services** – DORS, through the RISE Program, works with individuals interested in self-employment or entrepreneurship, whether to be located at the individual's home or another site. Inclusion of self-employment services on the **IPE** requires approval of the Regional/Program Director (see **RSM 2, Section 1400**).
- b. **Home-Based Employment Services** – DORS provides services to individuals interested in home-based employment and telecommuting, that is, working for another person or entity from one's home. Such services are provided in the same manner as those provided to consumers who are planning to work at an employer's site. DORS counselors shall seek technical assistance from Employment Specialists to assure that there has been sufficient analysis of the long-term feasibility of and any need for assistive technology for home-based employment under consideration. An **IPE** including a goal of home-based employment requires approval of the Regional/Program Director.

713 Supported Employment Services

See **RSM 2, Section 800.**

714 Vocational Counseling and Guidance

The counselor will provide discrete, substantial counseling services that are vocational in nature and are specifically designed to assist the individual in reaching an employment outcome. Vocational counseling will involve multiple sessions, be included in the **IPE**, and address issues such as vocational exploration, career decision making, establishment of a career path including short- and long-term goals, self-advocacy in the work place, development of problem-solving skills, and use of community resources related to employment. Such counseling will be provided within an “informed choice” model.

715 Vocational Training Services/Required Documentation

The following vocational and other training-related services may be provided to individuals determined eligible for such services. Except for training at colleges or universities, the record will contain documentation including the **Training Agreement (RS-7a)**. The individual’s progress in the training program will be documented using the **Training Progress Report (RS-7c)** or other similar written documentation.

715.01 Vocational Adjustment

Adjustment services (Work Adjustment Training (WAT) or Employee Development Services (EDS)) may be provided when required to assist the individual to meet the requirements of daily living, develop work habits and modify behaviors which interfere with adjustment in employment.

715.02 Books, Uniforms and Supplies for Vocational Training

Books, uniforms and other supplies required by the institution for the completion of the individual’s program may be provided as determined on an individual basis.

715.03 Occupational Tools for Training

Required tools may be provided when there is documentation of the need from the training facility.

715.04 General Education Diploma (GED®)

GED® training/preparation and GED® testing may be provided as appropriate.

- a. **GED® Preparation** – GED® training is provided by WTC and adult education providers. WTC also provides the Official GED® Practice Tests that are computer based.
- b. **GED® Testing** – Testing is provided through GED® Testing Services, a joint venture of the American Council on Education and Pearson VUE. Testing is computer based and administered by Pearson VUE at approved test centers around the state. Application for the GED® is available online at www.ged.com. The application includes instructions for requesting accommodations through the Maryland Department of Labor GED® office for review by GED® Testing Service. Payment is by credit card. DORS counselors may assist consumers, as appropriate, in applying to take the test and may assist in payment via DORS credit card, as appropriate. Cost of the full battery is \$45; single modules are \$11.25. (See **RSM 5, Section 206.**)

- c. **Maryland High School Diploma** – Individuals who pass all four modules of the GED® test will be awarded a Maryland High School Diploma, issued jointly by the State Board of Education and the Maryland Department of Labor.

715.05 Tutorial Services

Tutoring explicitly related to the employment goal on the **IPE** may be provided:

- a. Prior to a specific course of study in order to meet entry requirements,
- b. As an adjunct to a specific course in which the individual is enrolled and at risk of receiving a grade of D or lower, or
- c. In support of preparation for the GED® examination.

Tutoring may not be authorized as a general support so that an individual may maintain above average grades.

Tutors must be approved providers (see **RSM 3, Section 1007**). Tutors who do not hold teaching credentials may present alternate qualifications along with the **Provider Application (RS-9g)**. To document alternate qualifications, tutors requesting approval shall include a written recommendation from the course instructor and a resume. Tutors shall be paid in accordance with the fee schedule, whether the tutor is an approved provider based on teaching credentials or alternate qualifications.

715.06 On-the-Job Training

On-the-job training (OJT) offers the opportunity for individuals to learn a job directly at the job site, with the business owner or an assigned co-worker providing training specific to that position. OJT (up to four months) may be offered in lieu of formal training in an employment area where formal training is limited or does not exist, or in lieu of formal training for a consumer who may learn better on the actual job site rather than learning in a classroom setting and then transferring that knowledge to a workplace. Short-term OJT (up to one month) may be provided to supplement formal skills training or as a stand-alone service to assure the individual understands the specific job duties at the work site. OJT shall be provided in accordance with the following procedures:

- a. An agreement will be established between the employer/trainer and the DORS counselor.
- b. The agreement will include the specific job title for which training is to be provided, the objectives of the training, the length of time training is to be provided, evaluation procedures, financial arrangements, and any other pertinent information.
- c. The employer/trainer will agree to pay the trainee at least the minimum wage as established by federal law, and provide all appropriate benefits under state and federal laws pertaining to Workers' Compensation, Unemployment Insurance, and Social Security.
- d. An **On-the-Job Training Agreement (RS-7b)** will be completed and signed by the employer/trainer, the trainee/recipient of DORS services, and the counselor with a copy to the employer/trainer, trainee and DORS record of services. The **Short-Term On-the-Job Training Agreement (RS-7k)** shall be completed for individuals as appropriate, with copies provided to the employer/trainer, trainee and DORS record of services.
- e. DORS financial participation for OJT will be determined as follows:
 - 1. Divide the total training period (up to four months) into four equal periods.
 - 2. Maximum DORS financial participation will be as follows:

- 100% of salary for employment for the first quarter of OJT.
 - 75% of salary for second quarter of OJT.
 - 50% of salary for third quarter of OJT.
 - 25% of salary for fourth quarter of OJT.
3. DORS financial participation for Short-Term OJT will be determined as follows:
- Determine the appropriate training period, up to a maximum of four weeks.
 - DORS maximum financial participation will be 100% of salary for the specified period of time.
4. **Reporting requirements** – As specified on the Agreements, monthly reporting of process is required. (Only one progress report is required for Short-Term OJT).

715.07 Job Coaching Services

Short-term job coaching and intensive, supported employment job coaching may be provided, as appropriate, including community-based services such as job skills training, monitoring, follow-along and case management to assist an individual in maintaining employment, from job coaching programs that have been approved by DORS.

- a. Job coaching services will be purchased only from **DORS-approved programs**.
- b. Job coaching services shall be purchased in accordance with the Division's fee schedule and the policies and procedures set forth in **RSM 3, Section 1000, Section 1100 and Section 1400**.
- c. Job coaching services involve at least twice a month contact with the consumer at their job site (or off site if agreed upon) to assure the individual has the appropriate level of support to maintain their position. The amount of support required is based on a collaborative discussion between the provider, the consumer, and the DORS counselor.
- d. Service providers providing job coaching services shall submit an **Employment Services Progress Report (RS-7d)** on a monthly basis with an invoice. The counselor shall not process an invoice if the required information is not complete. (See **RSM 2, Attachment 800-1 through Attachment 800-4** for additional guidance in using the **Employment Services Progress Report (RS-7d)**).
- e. When providing job development, providers shall use the **Employment Services Progress Report (RS-7d)** monthly, whether or not they are submitting an invoice. Providers will be required to provide an explanation for provision of fewer than six hours of job development services for the consumer during any month. If fewer than six hours of job development are reported, the DORS counselor shall contact the consumer to discuss the situation. Depending on the information provided by the consumer and the explanation of the provider and justification provided on the report form, the DORS counselor may continue the service or may request consultation with DORS management and/or request a staffing. For additional information on job development see **Section 900**.
- f. When job coaching is provided after employment is obtained, job coaching may be authorized in increments determined on an individual basis, according to the appropriate **Job Coaching Fading Schedule (RSM 2, Attachment 800-3)**, depending on whether the individual is receiving short-term job coaching, or intensive job coaching prior to long-term funding, or intensive funding prior to natural supports.
- g. Short-term job coaching may be provided for individuals not funded for long-term supports who require intensive, time-limited services to maximize likelihood of obtaining and maintaining employment. Such job coaching may be provided at the job site or off-site. If the total hours for short-term job coaching are anticipated to exceed 100 hours, the provider must provide written

justification and the approval of the DORS regional director is required, with a staffing scheduled as determined by the DORS regional director. For additional information on short-term job coaching see **Section 900**.

- h. Supported Employment Job Coaching – see **Section 800**.

715.08 Training in Institutions of Post-Secondary Education

See **RSM 2, Section 1500**.

716 Occupational Tools for Employment

Provision of tools beyond the basic kit needed for employment shall require written documentation from the employer. Such documentation will be included in the record of services.

717 Support Services

The following services will be provided only in support of other rehabilitation services and with the qualifications noted. DORS staff shall determine the need for and the amount of financial assistance for support services on an individual basis and shall include justification and documentation of the need and amount in the record of services.

717.01 Personal Assistance Services

Personal Assistance Services (PAS), also referred to as attendant care, refers to a range of services, provided by one or more persons, designed to assist an individual with a disability to perform daily living activities on or off the job that the individual would typically perform without assistance if the individual did not have a disability. Activities of daily living include, but are not limited to:

- Eating
- Bathing
- Grooming
- Dressing
- Toileting
- Walking
- Transferring to bed or chair
- Traveling beyond walking distance
- Decision making
- Transporting and set-up of assistive devices

Such services shall be designed to increase the individual's control in life and ability to perform everyday activities on or off the job. The services be must necessary to the achievement of an employment outcome and may be provided only while the individual is receiving other VR services.

DORS may assist with costs associated with personal assistance/attendant care as required for the individual to achieve the employment outcome on an approved **IPE**. The following procedures apply:

- a. The DORS counselor shall provide information and referral assistance to individuals to help identify existing comparable benefits as soon as the potential need for PAS is identified.
- b. PAS may be approved only after the individual has applied for funding through the State's Personal Assistance/Attendant Care programs as possible comparable benefits.

- c. When considering PAS funding, and comparable benefits are available to meet some of the PAS needs, the counselor will analyze how the comparable benefits apply to the full IL needs of the individual, and then consider if additional DORS funding is required to participate in specific VR services.
- d. PAS maybe be provided by DORS as a support services to participate in assessments, as necessary.
- e. PAS may be provided as a component of an **IPE** only if it is a support service to a major VR service identified on the **IPE**.
- f. PAS are provided at no cost to the individual, and consistent with rates listed in **RSM 5, Section 206.06** (up to two times the minimum wage).
- g. DORS funding of PAS may include training in managing, supervising, and directing personal assistance services.
- h. DORS funding for PAS may be arranged through the vendor authorization system (see **RSM 3, Section 1103**) or the M&T system (see **RSM 3, Section 1105**). When the individual receives M&T for this purposes, the individual is responsible for the hiring and payment of the PAS worker. The individual must maintain a log of hours and payments, along with proof of payment (e.g., cancelled checks) to be turned in to the DORS counselor on a monthly basis. This information will be maintained in the individual's record of services. See **Personal Assistance Services Monthly Log (RS-6s)**.

717.02 Maintenance

Maintenance payments will be provided to eligible individuals in accordance with the following:

- a. Maintenance payments will be provided only when it is documented that the individual is faced with additional costs over and above normal needs for food, clothing and shelter, and another source is not available for payment of such expenses.
- b. Maintenance payments will not exceed the estimated additional cost of an individual's subsistence.
- c. Maintenance payments will not be provided to an individual who is employed when such payments are intended as an income supplement.

717.03 Services to Family Members

Services to members of an eligible individual's family may be authorized when necessary for the vocational rehabilitation of the individual and identified on the **IPE**.

Assistance with child care may be approved after a thorough exploration of comparable benefits through county child care resource centers, Departments of Social Services, and other resources and after consideration of natural supports.

717.04 Transportation

Transportation, including necessary travel and related expenses during travel, will be provided to individuals and their attendants or escorts if necessary for the purpose of supporting and deriving the full benefit of other VR services being provided.

- a. The amount and type of funding for transportation will be determined with the individual with consideration given to actual expense anticipated using the most cost-effective means of transportation consistent with the individual's needs and level of independence.

- b. Transportation assistance may include provision of gas money/mileage allowance through the M&T authority, not to exceed the current State reimbursement rate per mile.
- c. Transportation assistance may also include issuance of vouchers, passes, tokens, coins, or fare cards.
- d. **Out-of-state travel** – Purchase of airfare, AMTRAK tickets and interstate bus tickets requires administrative approval. Once administrative approval is obtained, the request shall be forwarded to DORS Administration & Financial Services (AFS) Director, whose office will provide technical assistance regarding applicable MSDE out-of-state travel policies and procedures.

Note: Travel involving MARC tickets, ticket to local bus and paratransit systems, and the Baltimore or Washington DC subway systems does not require coordination of the AFS Director.

- e. The record of services shall include justification for provision of transportation assistance and documentation of receipt by the individual of transportation funds in any form other than through M&T (e.g., vouchers, passes, tokens, coins, or fare cards). Established regional or office procedures for issuance shall be followed. The record of services shall include the **Administrative Approval (RS-9h)** form and approval Case Note if the consumer is provided assistance with out-of-state travel as described in (d) above.

Transportation expenses related to permanent relocation will be provided only when the individual's vocational adjustment and job security warrant such assistance and the need is adequately justified and documented.

718 Internships

Research has shown that internships are an effective tool in assisting individuals with disabilities to achieve employment. Consumers in internships have the opportunity to develop employment skills, "soft" skills, experience for a resume and a network of contacts/colleagues. Internships may be unpaid or paid. Procedures and considerations follow.

718.01 Unpaid Internships

Unpaid internships may be provided by non-profit or for-profit organizations.

- a. **Internship Requirements** – An unpaid work-based learning experience or internship with a company (i.e., for-profit businesses or nonprofit, charitable or religious organizations that provide an unpaid work-based learning experience to a DORS consumer) is a learning experience for the DORS consumer and is an extension of the consumer's VR program. Unpaid internships are provided in Service status. An internship must meet the following six criteria:
 1. The internship, even though it includes actual operation of the facilities of the employer, is similar to training which would be given in an educational environment.
 2. The internship experience is for the benefit of the intern.
 3. The intern does not displace regular employees, but works under close supervision of existing staff.
 4. The employer that provides the training derives no immediate advantage from the activities of the intern; and on occasion its operations may actually be impeded.
 5. The intern is not necessarily entitled to a job at the conclusion of the internship.

6. The employer and the intern understand that the intern is not entitled to wages for the time spent in the internship.

An internship/unpaid work-based learning experience with a company that does not meet these six criteria may be considered employment under the Fair Labor Standards Act (FLSA). An employee would be entitled to minimum wage and overtime compensation for hours worked over 40 in a workweek.

- b. **DORS Staff Fact Sheet: Unpaid Work-Based Learning Experiences/Internships (RS-7n)** outlines procedures in setting up an unpaid internship for a consumer.
- c. **Employer Fact Sheet: Internships/Unpaid Work-based Learning Experiences (RS-7p)** may be provided to employers who may be interested in offering unpaid work-based learning experience to DORS consumers.
- d. **Internship Agreement: Unpaid Work-Based Learning Experiences (RS-7m)** must be used to document the agreement between the consumer/intern, the business offering the internship, and DORS staff.
- e. **Workers' Compensation Coverage** –Maryland regulation stipulates that the business offering the internship cover interns with disabilities through their Workers' Compensation coverage during the course of an internship, and includes that DORS can reimburse the employer **the lesser** of the cost of the premium for the intern's Workers' Compensation coverage or \$250 per consumer. The internship must be coordinated by a DORS counselor and a signed **Internship Agreement: Unpaid Work-Based Learning Experiences (RS-7m)** is required. Information about Workers' Compensation coverage is included in the **Employer Fact Sheet: Internships/Unpaid Work-based Learning Experiences (RS-7p)**.
- f. **Maintenance & Transportation Assistance** – DORS may offer financial assistance to consumers participating in unpaid internships/work-based learning experiences, through the M&T authority (**Section 717.02** and **Section 717.04**), to help defray additional costs of participating in the internship. Such costs may include transportation (e.g., bus pass, mileage), clothing, meal allowance and parking. The amount of M&T to be provided shall be determined on an individual basis based on needs and circumstances and shall be justified and documented in the record of services.
- g. **Internship Progress** – The **Internship Assessment (RS-7r)** is to be provided to the business hosting the internship in order to document the progress made by the DORS consumer/intern in achieving the learning objectives outlined in the **Internship Agreement (RS-7m)**. DORS staff shall include the learning objectives from the **Internship Agreement** on the **Internship Assessment** form and then provide it to the business hosting the intern. The **Internship Assessment** is to be completed at least monthly.
- h. **Internship Attendance** –**DORS Intern Attendance Log (RS-7s)** is to be completed by the DORS consumer/intern, signed by the intern and the internship supervisor, and provided to the DORS counselor at least monthly.

718.02 Paid Internships

In the event a consumer will be participating in a paid internship, the business/employer is responsible for paying the consumer/intern a fair wage (at least State minimum) and providing Workers' Compensation. It is likely that organizations offering paid internships will have procedures in place to document the internship.

719 Benefits Planning Services

As described in **RSM 2, Section 406.15(a)**, benefits planning services are an important part of career decision making for consumers who receive Supplemental Security Income (SSI) and/or Social Security Disability Insurance (SSDI) benefits. Benefits planners are skilled in helping a consumer determine the effect of working on benefits and are knowledgeable about many work incentives available to beneficiaries, and, between employment and DORS case closure, can provide valuable referral and coordination to natural and long-term supports such as those afforded by Employment Networks.

719.01 Available Sources of Benefits Planning Services

The Benefits Planning Resources section of InDORS includes a listing of **DORS-approved Benefits Planning Providers** who are paid on a fee-for-service basis.

719.02 Reasonable Accommodations for Benefits Planning

DORS covers the cost of reasonable accommodations for benefits planning for DORS-approved providers of benefits planning services.

It is recommended that if benefits planning is required and the consumer requires a foreign language interpreter, initial effort to identify a provider that offers services in that language be utilized. If there is not a provider available, then an authorization for interpreter services can also be drafted. This ensures that vital information regarding the financial decision making of a Social Security beneficiary is provided to all DORS consumers, regardless of primary language.

719.03 Documentation of Benefits Planning Services

Benefits planners will provide feedback and specific documentation regarding services provided to DORS on a fee-for-service basis. These reports must accompany the invoices for each service.

719.04 Benefits Planning During the Rehabilitation Process

- a. **Application/Initial Interview** – See **Section 406.15(b)**, SSI/SSDI Beneficiaries.
- b. **Delayed Status** – The DORS Waiting List letter for eligible individuals assigned to Order of Selection Category 2 provides information regarding services that Social Security beneficiaries may access while on the DORS waiting list, including:
 1. The [Maryland Work Incentives Network \(MD-WIN\)](#) providing benefits planning services (Contact: 240-638-0071, toll free 888-838-1776; www.innow.org/md-win).
 2. Partnership Plus Employment Networks providing employment-related services.
 3. The [Employed Individuals with Disabilities \(EID\) program](#) providing health care benefits through Medicaid coverage to Marylanders with disabilities who are working and getting paid.
- c. **General Benefits Consultation** – This service is only available to VR consumers prior to implementation of their **IPE**. This may be particularly useful for those consumers who are ambivalent about working or are unsure of an earnings goal. After verifying that a beneficiary has been appropriately assigned to disability priority Category 2, DORS counselors may refer these consumers for a fee-for-service General Benefits Consultation while they are on the DORS waiting list.
- d. **Eligible Status** – On a monthly basis, DORS HQ staff will distribute the **Benefits Planning Fact Sheet (RS-1k)** to Social Security beneficiaries determined eligible in Order of Selection Category 1 during that month. On those occasions when a Social Security beneficiary is moved

from Delayed to Eligible status due to a disability priority increase, the DORS counselor will ensure the consumer receives the fact sheet.

- e. **Plan Development** – DORS counselors should plan to refer all applicable SSI/SSDI beneficiaries for DORS-funded benefits planning services as appropriate. (While certain EBPSE providers include limited benefits planning consultation to joint consumers, this service is not a replacement for DORS fee-for-service benefits planning.)

1. Include as services on the IPE:

i. All three Benefits Planning Phases, described in the **Benefits Planning Desk Reference (RS-1n)**.

ii. A potential Ticket to Work handoff at DORS closure.

- For an **IPE** involving supported employment, this handoff may be included in the service description for the Transition to Long-Term or to Natural Supports.
- For all other **IPEs**, include this handoff at DORS closure as a follow-up service (e.g., vocational guidance and counseling).

2. Ensure the **Beginning the Job Search: Consent for Disclosure (RS-8f)** is completed appropriately for Social Security beneficiaries, meaning the consumer must be asked to grant consent by signing for both:

i. DORS Job Search Assistance (required for all individuals prior to job search assistance).

ii. DORS Ticket to Work Employment Network Assistance (required specifically for Social Security beneficiaries). If consent is granted, select the “OK to Refer to EN” checkbox on the AWARE™ “Special Programs” page.

f. **Service Delivery**

1. When the **IPE** is first initiated, the DORS counselor will discuss available benefits planning providers with the consumer and complete the **Referral for Benefits Planning Services (RS-1h)** for either:

i. A **Benefits Check-In** for a returning consumer who previously received benefits planning services and wants to return to the previous provider, or

ii. **Phase 1: Pre-Employment Benefits Planning.**

2. When used, the **Benefits Check-In** may result in a recommendation for a full **Phase 1** authorization or for additional hours to address special circumstances. **Phase 1** services will continue to be provided until the individual becomes employed.

3. When the individual becomes employed, the DORS counselor will issue an authorization for **Phase 2: Job placement and employment/maintenance**. These services will be provided until employment stability is achieved.

4. When the individual achieves employment stability and moves into employed status, the DORS counselor will issue an authorization for **Phase 3: Developing supports for DORS case closure**. During the subsequent months leading up to case closure, the benefits planner will check-in at least monthly with the consumer and the DORS counselor will provide information and referral assistance to facilitate a potential assignment of the individual’s Ticket to Work with an Employment Network partner.

Note: If the consumer will immediately begin job placement services when the **IPE** is initiated, the DORS counselor may choose to issue one authorization for all three phases.

- g. **Special Circumstances** – In particularly complex benefits situations, additional benefits planning services may be authorized at an hourly rate. A comprehensive list of such circumstances is available in the **Benefits Planning Desk Reference (RS-1n)**.
- h. **Post-Closure** – Benefits Planning Services and other natural supports services may be provided or facilitated for Ticket Holders connected to DORS Partnership Plus Employment Networks.

719.05 Benefits Planning as a Pre-Employment Transition Service

- a. Benefits planning is available as a **Pre-ETS Workplace Readiness Training** service for potentially eligible students receiving Pre-ETS services prior to applying for VR services and for students with disabilities who have **IPEs**. When using Pre-ETS funds, benefits planning services are limited to:
 - 1. General Benefits Consultation
 - 2. Phase 1: Pre-employment Benefits Planning (only when prior to the student's participation in paid work-based learning experiences)
- b. If an individual received a **Pre-ETS General Benefits Consultation** and later initiates an **IPE**, include all three phases of benefits planning on the **IPE**. If **Phase 1** was previously provided, a **Benefits Check-In** is recommended to determine whether new **Phase 1** services are required due, for instance, to significant changes in the individual's benefits.