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The following updates are being made to the online Client Services Guide located at <http://dese.mo.gov/vr/csg.htm>. For those of you who have a paper copy of the guide, please update it accordingly.

Revisions/Additions are shown in red as follows:

CHAPTER 9 – COUNSELING AND GUIDANCE

900 COUNSELING AND GUIDANCE

900.3 Procedure

- Document informed choice in the VR case folder.
- Select the “appropriate” Counseling and Guidance IPE form (standard, self-employment, or COOP) in MoRIS, and review roles/responsibilities with client.
- **The District Supervisor will review and approve all initial plans prior to service and will approve all plans for services costing \$10,000.00 or more. *Exception: Assistant Supervisor and Counselor IV will be exempt from these plan reviews.***
- If authorizing a secondary service that is based on financial need, collect required financial information/file in the financial section of the case folder.

CHAPTER 10 – SELF-EMPLOYMENT GUIDELINES

1000 SELF-EMPLOYMENT GUIDELINES

1000.3.6 Self-Employment Business Plan

- Approval Process:
 - ~~Senior Counselors with plan approval – may review and approve business plans that do not exceed \$5000 in total VR contribution, but are encouraged to discuss these with the district supervisor.~~
 - **District Supervisors - should approve all business plans that exceed \$5000 in total VR contribution initial plans prior to service and all plans for services costing \$10,000.00 or more. *Exceptions: Assistant Supervisor and Counselor IV will be exempt from these reviews.***

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- Self-Employment Review Team - should review ~~and approve~~ all business plans that exceed \$10,000 in total VR contribution and may be consulted by the district supervisor or counselor on other cases with a total cost of less than \$10,000.

CHAPTER 11 – PHYSICAL AND MENTAL RESTORATION SERVICES

1120 SURGERY, ANESTHESIA AND DRUGS/SUPPLIES

1120.4 Procedure

1120.4.1 Surgery and Treatment

- Counselor receives physician's letter recommending hospitalization/ surgery (Surgical Report).
- Counselor contacts referring physician for usual information needed to authorize hospitalization/surgery, including a diagnosis and estimated length of stay.
- Counselor completes the Central Office Surgery Worksheet stating the reason for the requested procedure and how it will impact client's employability.
- Counselor presents the case to the Medical Consultant/District Supervisor or Assistant District Supervisor for review and approval.
- *The District Supervisor will review and approve all initial plans prior to service and will approve all plans for services costing \$10,000.00 or more. Exception: Assistant Supervisor and Counselor IV will be exempt from these plan reviews.*
- Consult with Client Services Section for approval of a hospital stay that is in excess of **five** days.
- Counselor authorizes hospitalization and surgery.

1130 HOSPITALIZATION, AND CONVALESCENT CARE

1130.4 Procedure

- When providing hospitalization and/or convalescent care associated with an IPE as a primary or secondary rehabilitation service:

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- Search for and apply all comparable services/benefits, including Medicare/Medicaid, or private insurance.
- If the vendor accepts Medicaid, then Medicaid payment must be accepted as payment in full.
- Discuss financial guidelines, collect required financial documentation, and complete VR cost worksheet when appropriate.
- Obtain approval from District Supervisor, Assistant Supervisor, and/or Client Services Section, as appropriate. *The District Supervisor will review and approve all initial plans prior to service and will approve all plans for services costing \$10,000.00 or more. Exception: Assistant Supervisor and Counselor IV will be exempt from these plan reviews.*
- Prepare an authorization, in accordance with fees listed in the VR Medical Fee Schedule.

1140 PROSTHETIC AND ORTHOTIC APPLIANCES

1140.4 Procedure

- Document informed choice regarding the selection of vendor/provider.
- Search for and apply all comparable services/benefits, including Medicare/Medicaid, or private insurance.
- If the vendor accepts Medicaid, then Medicaid payment must be accepted as payment in full.
- Discuss financial guidelines, collect required financial documentation, and complete VR cost worksheet when appropriate.
- Obtain bids for the prescribed prosthetic or orthotic device/service from at least two vendors, taking into consideration the client's age, preference of vendor, quality, service and warranty.
- Prepare an authorization, in accordance with the most cost-effective bid, less any comparable service amount.
- Meet with the client to review and sign the IPE including responsibility addendums.
- *The District Supervisor will review and approve all initial plans prior to service and will approve all plans for services costing \$10,000.00 or more. Exception:*

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Assistant Supervisor and Counselor IV will be exempt from these plan reviews.

- Complete the “Counselor Comprehensive Assessment” form in MoRIS, if this is an initial IPE.
- Follow current Ticket-To-Work Procedure, when appropriate.
- Verify services are in the process of being provided, move to Status 16.

1150.4 Procedure

- Document informed choice regarding the selection of vendor/provider.
- Search for and apply all comparable services/benefits, including private insurance.
- Discuss financial guidelines, collect required financial documentation, and complete VR cost worksheet when appropriate.
- If dental surgery/anesthesia at a hospital or out-patient clinic is being recommended, obtain approval from District Supervisor/Assistant Supervisor.
- Prepare an authorization, in accordance with dental fees listed in the VR Medical Fee Schedule. If fee numbers are not available, contact Client Services Section.
- Meet with the client to review and sign the IPE including responsibility addendums.
- *The District Supervisor will review and approve all initial plans prior to service and will approve all plans for services costing \$10,000.00 or more. Exception: Assistant Supervisor and Counselor IV will be exempt from these plan reviews.*
- Complete the “Counselor Comprehensive Assessment” form in MoRIS if it is an initial IPE.

1160 EYEGASSES AND VISUAL SERVICES

1160.4 Procedure

- Document informed choice regarding the selection of vendor/provider.

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- Search for and apply all comparable services/benefits, including Medicare/Medicaid, and private insurance.
- Discuss financial guidelines, collect required financial documentation, and complete VR cost worksheet when appropriate.
- Obtain bids for the prescribed eyeglasses from at least two vendors, taking into consideration the client's age, preference of vendor, quality, service and warranty.
- Prepare an authorization in accordance with fees listed in the VR Medical Fee Schedule (Durable Medical Equipment), or the most cost-effective bid, whichever is less.
- If visual services are of a surgical nature, follow guidelines for surgical procedures, and obtain approval from District Supervisor, Assistant Supervisor, and/or Client Services Section.
- Meet with the client to review and sign the IPE including responsibility addendums.
- *The District Supervisor will review and approve all initial plans prior to service and will approve all plans for services costing \$10,000.00 or more. Exception: Assistant Supervisor and Counselor IV will be exempt from these plan reviews.*
- Complete the "Counselor Comprehensive Assessment" form in MoRIS, if provided in association with other services listed on the initial IPE.

1170 REHABILITATION TECHNOLOGY

1170.3.1 Initial Considerations (continued)

- Rehabilitation technology includes the following:
 - **Rehabilitation Engineering Services** include consultation/assessment of specialized engineering needs or individual adaptive devices, and subsequent job-site modification and/or designing and fabricating individual adaptive devices.
 - **Assistive Technology Devices** include any item, piece of equipment, or product system, whether acquired commercially off the shelf, modified, or customized, that is used to increase, maintain, or improve the functional capabilities of individuals with disabilities. Devices may be as simple and common as a modified door handle or as complex

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and unique as a ~~voice-controlled personal computer~~ **an augmentative and alternative communication device (AAC) or other adaptive computer accessibility software or hardware.**

1170.3.2 Title and Ownership

- All assistive technology devices which are specially fitted, modified or *customized* for a particular client's needs will become the client's when the vendor provides the device.
- Those non-customized devices costing less than \$300.00 will become the client's when the vendor provides the device.
- Ownership of all assistive technology devices which are non-customized costing \$300.00 or more will be retained by the agency for a specified amount of time. Each unit costing \$300.00 or more will have an inventory number affixed for future identification. Some examples of this type of "device" include computer systems, printers, ~~typewriters~~ **AAC devices, text or text to speech devices**, TDD's and medical equipment.
- A client shall not sell, mortgage, give away, or in any other manner, dispose of the equipment without VR's consent unless the client has been given title to the assistive device.
- If the assistive device is not being used by the client, it is subject to recovery by VR for reissue or sale, at any time prior to the client's right to permanent title. Items not useable will be so designated and removed from the inventory list.

1170.4 Procedure (continued)

- **\$1,000.00 or more - less than \$5,000.00** – Title to all non-customized items costing \$1,000.00 or more but less \$5,000.00 each will be given to the client following continued use for a period of two years. Each year the client will be contacted to determine if the assistive technology device is still being utilized.
 - **\$5,000.00 or more** – Title to all non-customized items costing \$5,000.00 or more will be given to the client following continued use for a period of three years. Each year client will be contacted to determine if the assistive device is being utilized.
- Search for and apply all comparable services/benefits, including Medicare/Medicaid, or private insurance.

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- If rehabilitation technology services are not being provided as a diagnostic service, meet with the client to review and sign the IPE including responsibility addendum for rehabilitation technology services.
- *The District Supervisor will review and approve all initial plans prior to service and will approve all plans for services costing \$10,000.00 or more. Exception: Assistant Supervisor and Counselor IV will be exempt from these plan reviews.*
- Prepare an authorization in accordance with rehabilitation technology fees listed in the VR Fee Schedule, and/or in accordance with the most cost-effective bid for a non-inventory or inventory item, less any comparable service amount.

1170.5 Authorization and Billing (continued)

- Fee #430502 – Assistive Technology Assessment/Consultation: A specialized assessment of assistive technology needs. May include needs for computer access, augmentative communication, powered wheelchair mobility and/or other assistive technology needs with written report. PLEASE USE CPT #97755.
- The following fee numbers should be used when preparing an authorization for Rehabilitation Engineering or Assistive Technology Services:
 - Fee #430501– Rehabilitation Engineering Services: Job site modification and/or designing and fabricating individual adaptive devices. May include consultation with client and/or other rehabilitation professionals (i.e., OT, PT, **Speech Language Pathologist –SLP, Physician - DR.,** etc.), fitting, training of client, and follow-up, each 15 minutes.
 - Fee #430503 – Assistive Technology Services: Specialized one-on-one training or the provision of assistive technology aids to accomplish specified goals. May include consultation with rehabilitation engineer and/or other rehabilitation professionals (i.e. OT, **SLP** and PT). PLEASE USE CPT #97537.
- When preparing an authorization for an **assistive technology device(s)**, the authorization should be issued to the appropriate vendor who has provided the most cost-effective bid, using fee number 99999999. This number will allow the district office to enter a description for the service, the unit of measure code, service code and amount authorized.

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- The appropriate service codes to be used when preparing an authorization for assistive technology devices using a 99999999 fee number are listed below:
 - 36 Assistive technology device [Non-Inventory]
 - 38 Assistive technology device [Inventory]

1180.4 Procedure

- Document informed choice regarding the selection of provider.
- Search for and apply all comparable services/benefits, including Medicare/Medicaid, and private insurance.
- Discuss financial guidelines, collect required financial documentation, and complete VR cost worksheet when appropriate.
- Meet with the client to review and sign the IPE including responsibility addendums.
- *The District Supervisor will review and approve all initial plans prior to service and will approve all plans for services costing \$10,000.00 or more. Exception: Assistant Supervisor and Counselor IV will be exempt from these plan reviews.*
- Verify services have been provided.

1190.4 Procedure

- Document informed choice regarding the selection of vendor.
- Search for and apply all comparable services/benefits, including Medicare/Medicaid, and private insurance.
- Discuss financial guidelines, collect required financial information, and complete VR cost worksheet when appropriate.
- Obtain two competitive bids for the prescribed hearing aids from at least two vendors, in accordance with best case practice listed in this section, taking into consideration the client's age, preference of vendor, quality, service and warranty.
- Prepare an authorization in accordance with fees listed in the VR Medical Fee Schedule, with the most cost-effective bid, less any comparable service amount.

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- The District Supervisor will review and approve all initial plans prior to service and will approve all plans for services costing \$10,000.00 or more.
Exception: Assistant Supervisor and Counselor IV will be exempt from these plan reviews.
- Meet with the client to review and sign the IPE including responsibility addendums.

CHAPTER 12 – CRP-SESP TRAINING

1200 EMPLOYMENT OUTCOME SERVICES

1200.5 Procedure

- Document informed choice.
- EOS is not based upon financial need.
- Secondary services are based on financial need, and appropriate documentation should be in the financial section of the case file.
- Meet with client to review/sign the IPE, including responsibility addendums, and prepare authorization in accordance with the CRP Fee Schedule.
- The District Supervisor will review and approve all initial plans prior to service and will approve all plans for services costing \$10,000.00 or more.
Exception: Assistant Supervisor and Counselor IV will be exempt from these plan reviews.

1210 SUPPORTED EMPLOYMENT JOB COACHING

1210.5 Procedure (continued)

- The District Supervisor will review and approve all initial plans prior to service and will approve all plans for services costing \$10,000.00 or more.
Exception: Assistant Supervisor and Counselor IV will be exempt from these plan reviews.
- Extended services (follow along) for persons in supported employment training programs must be discussed/planned as follows, **prior to** the approval of an IPE:
 - In individual job coach models, extended services/follow along should be identified prior to the development of an IPE, and utilized when job

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coaching has exceeded nine months or the client requires **25% or less** job coaching, whichever comes first.

1220 COMMUNITY EMPLOYMENT SERVICES (CES) Job Coaching

1220.5 Procedure

- Documentation of informed choice regarding the client's selection of provider for community employment services is required in the VR case folder.
- CES job coaching services are not based on financial need.
- Secondary services provided to clients who are receiving CES job coaching will be based on financial need, and financial information should be appropriately documented in the financial section of the case folder.
- Schedule a meeting with client and provider to confirm the client's place of employment, start date, client and provider roles/responsibilities, client satisfaction with the job, and overall employment related expectations during CES job coaching, and review and sign IPE.
- *The District Supervisor will review and approve all initial plans prior to service and will approve all plans for services costing \$10,000.00 or more. Exception: Assistant Supervisor and Counselor IV will be exempt from these plan reviews.*

1230 COMPREHENSIVE REHABILITATION TRAINING (CRT) for Special Programs

1230.5 Procedure (continued)

- *The District Supervisor will review and approve all initial plans prior to service and will approve all plans for services costing \$10,000.00 or more. Exception: Assistant Supervisor and Counselor IV will be exempt from these plan reviews.*
- Follow current Ticket-To-Work Procedure, when appropriate.

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1240 SKILLS TRAINING AT COMMUNITY REHABILITATION PROGRAMS

1240.5 Procedure

- Documentation of informed choice regarding the client's selection of the CRP and the specific skills training is required in the VR case folder.
- Completion of Training Program Comparison Form (if appropriate) is required in the VR case folder, as well as documentation of any comparable services and benefits.
- Financial information should be appropriately documented in the financial section of the case folder. Complete cost worksheet as appropriate.
- Prepare an authorization in accordance with the appropriate CRP Fee Schedule which will show the total cost of training and cost per instructional period. Placement services are included in the training fee.
- *The District Supervisor will review and approve all initial plans prior to service and will approve all plans for services costing \$10,000.00 or more. Exception: Assistant Supervisor and Counselor IV will be exempt from these plan reviews.*
- Ensure appropriate referral information has been sent to the provider prior to the start date.

CHAPTER 13 – ON-THE-JOB TRAINING

1300 ON-THE-JOB TRAINING (OJT)

1300.3 Procedure

- Document informed choice and why OJT is required.
- OJT is not based upon financial need.
- Secondary services are based on financial need, and appropriate documentation should be in the financial section of the case file.
- Meet with client to review/sign the "Paid OJT IPE", including responsibility addendums, and prepare authorization.
- *The District Supervisor will review and approve all initial plans prior to service and will approve all plans for services costing \$10,000.00 or more.*

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Exception: Assistant Supervisor and counselor IV will be exempt from these plan reviews.

CHAPTER 14 – TRAINING

1400 COLLEGE TRAINING

1400.3 Procedure

- Document informed choice regarding the client’s vocational goal selection and choice of college.
- Collect required financial documentation (to include financial application, if appropriate), complete Training Program Comparison Form (if appropriate); and place in financial section of the case folder.
- Obtain documentation of grants/gift aid and/or other comparable services (SAR, Financial Aid Award Letter, etc.), and determine educational related costs.
- Apply comparable services, as appropriate.
- Complete the Cost Worksheet, if appropriate.
- Follow current Ticket-To-Work Procedure.
- Review IPE for college training and associated addendums with client, and prepare appropriate authorizations.
- The District Supervisor will review and approve all initial plans prior to service and will approve all plans for services costing \$10,000.00 or more. *Exception: Assistant Supervisor and Counselor IV will be exempt from these plan reviews.*

CHAPTER 15 – TRAINING

1500 PROPRIETARY, BUSINESS, TRADE, AND TECHNICAL TRAINING

1500.3 Procedure (continued)

- Collect required financial documentation, complete Training Program Comparison Form (if appropriate); and place in the financial section of the case folder.

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- Before authorizing books/training materials/tools, contact the school and/or review the Placement Equipment “Available View” in MoRIS to determine if training materials are available for transfer.
- Obtain documentation of comparable services (SAR, Financial Aid Award Letter, etc.), and determine educational related costs.
- Apply comparable services, as appropriate.
- Complete the Cost Worksheet, if services are based on financial need or if there are comparable services.
- Follow current Ticket-To-Work Procedure.
- Review IPE for training and associated addendums with client, and prepare appropriate authorizations.
- *The District Supervisor will review and approve all initial plans prior to service and will approve all plans for services costing \$10,000.00 or more. Exception: Assistant Supervisor and Counselor IV will be exempt from these plan reviews.*
- Complete the “Counselor Comprehensive Assessment” form in MoRIS, if this is an initial IPE.

CHAPTER 16 – TRAINING

1600 ON-LINE, CORRESPONDENCE, DISTANCE LEARNING TRAINING

1600.3 Procedure (continued)

- Will satisfactory completion of the class/course result in college credit?
- Is the time frame projected for completion reasonable?
- Are comparable benefits available and, if yes, how will they be applied?
- Collect required financial documentation, complete Training Program Comparison Form (if appropriate); and place in the financial section of the case folder.
- Obtain documentation of comparable services (SAR, Financial Aid Award Letter, etc.), and determine educational related costs.

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- Complete the Cost Worksheet, if services are based on financial need or if comparable services are available.
- Follow current Ticket-To-Work Procedure, if appropriate.
- Review IPE for training and associated addendums with client, and prepare appropriate authorizations.
- *The District Supervisor will review and approve all initial plans prior to service and will approve all plans for services costing \$10,000.00 or more. Exception: Assistant Supervisor and Counselor IV will be exempt from these plan reviews.*

CHAPTER 17 – TRANSITION SERVICES

1700 TRANSITION

1700.6 Procedure (continued)

- Follow appropriate financial guidelines and collect required financial documentation when providing transition services that are based on need.
- Meet with client to review/sign the Transition Planning Summary Form if an IPE is not going to be developed prior to graduation for a student who is receiving special education services.
- Meet with the client to review/sign an IPE (if appropriate), including responsibility addendums, and prepare appropriate associated authorizations.
- *The District Supervisor will review and approve all initial plans prior to service and will approve all plans for services costing \$10,000.00 or more. Exception: Assistant Supervisor and Counselor IV will be exempt from these plan reviews.*

CHAPTER 19 – EQUIPMENT AND MODIFICATIONS

1900 VEHICLE MODIFICATION

1900.2.2 Requirements

- *The agency may provide needed modifications to a vehicle titled in the name of the client and/or an immediate family member. Radios, tape or compact disc players, or clocks shall not be included in the modifications. MDVR shall not authorize the purchase or installation of standard or optional equipment traditionally available through a car dealer at purchase, such as automatic transmission, power steering*

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and brakes, cruise control, antilock brake system, air bags, or air conditioning unless a physician certifies that such equipment is medically necessary or, because of the disability, is required for safe use of the vehicle.

- Automobile modifications, rather than van modifications, should be considered unless there are documented medical contraindications.
- Clients provided vehicle modifications by the Division must obtain, at their own cost, insurance on those modifications. The insurance policy must include an endorsement to cover the modifications. The division will not repair or replace vehicle modifications lost through theft, damaged in an accident, or otherwise rendered inoperable, since these costs will be paid through the client's deductible and the insurance company. The agreement to purchase insurance on the modifications must be reflected in the IPE and in any amendments to the IPE.
- The client must agree to care for and maintain the equipment after the warranty has expired. This agreement must be reflected in the IPE and in any amendments to the IPE. Client's plans for future replacement of the equipment must be addressed.
- Upon completion of installed technology, a final equipment check with client and evaluator will be conducted prior to approval of final payment.

1900.2.3 Initial Considerations

- The counselor must explore the availability of other means of meeting the transportation needs of the client. The counselor must always evaluate local transportation systems to determine if there is suitable transportation in existence that would meet the needs of the client to participate in the rehabilitation program and to achieve the employment outcome. Other means of meeting the needs of the client may also include, but are not limited to, the client's current mode of transportation, reasonableness of using other modes of transportation, or solutions such as taxi cabs, carpools, paid coworkers, volunteer attendants, public transportation for individuals with disabilities, other community services or relocation of the client to a location where the specialized needs may be met, if such a move is cost effective. The agency shall not authorize modifications to a vehicle when the participant can effectively utilize other modes of transportation.
- Obtain written price quotations from at least two (2) **National Mobility Equipment Dealers Association (NMEDA) certified** vendors, and prepare to authorize services based upon the lesser price quote, unless one of the following occurs:
 - Only one price quotation is required if the equipment and/or modification can be obtained from only one firm. In this case attach a full explanation to the one price quotation available.
 - The client chooses to purchase equipment from the higher priced vendor, and agrees to pay the difference between the two price quotes.

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- Review/advise the client of the following responsibilities and document in the case file:
 - Client must have a valid drivers' license.
 - Client must show ownership of the vehicle or that it is owned by a parent or guardian.
 - Client is responsible for payment of the vehicle (including loan payments) and insurance premiums, and must show proof that the vehicle is insured.
 - Client must show proof that the vehicle is in good mechanical condition (passes state **and NMEDA vendor** inspection), and payment of all required city and state licenses.
 - Client is responsible for all costs associated with continued maintenance of the vehicle and adaptive equipment.
- Age and mileage of vehicle must meet NMEDA installers specifications.
- ~~Counselors with plan approval may approve vehicle modifications costing less than \$40,000.~~
- ~~The District Supervisor must approve all modifications for counselors who do not have plan approval AND all vehicle modifications costing more than \$40,000.~~
- **Age and mileage of vehicle must meet NMEDA installers specifications.**
- **The District Supervisor will review and approve all initial plans prior to service and will approve all plans for services costing \$10,000.00 or more. *Exception: Assistant Supervisor and Counselor IV will be exempt from these plan reviews.***
- Counselors should maintain at least monthly contact with the client and vendor when developing and implementing a plan for services involving vehicle modification to ensure client choice and satisfaction, as well as appropriate service provision.

1900.3 Procedure

- Document informed choice regarding the client's vocational goal selection and choice vehicle modifications.
- Collect required financial documentation, obtain price quotes/written appraisals (if appropriate); and place documentation in the financial section of the case folder.
- Complete the Cost Worksheet, and document any client contribution, if appropriate.
- Follow current Ticket-To-Work Procedure, if appropriate.

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- Review IPE and associated addendums/responsibilities with client.
- Clients must agree to and sign Client Responsibilities, "Tools and Equipment" "**Vehicle Modification Responsibilities**" prior to the authorization of services.

1910 HOME MODIFICATION

1910.2.2 Initial Considerations (continued)

- Obtain written price quotations from at least two (2) vendors, and prepare to authorize services based upon the lesser price quote, unless one of the following occurs:
 - The modification can be obtained from only one company. Attach explanation to the one price quotation available.
 - The client chooses to purchase the modification(s) from the higher priced vendor, and agrees to pay the difference between the two price quotes. Document client agreement.
 - When there is client participation, the vendor(s) should be advised that it is their responsibility to obtain client's contribution. Document communication with vendor.
- The provision of home modifications should be thoroughly evaluated by the counselor and District Supervisor. The evaluation should include an on-site visit and any other activity to justify the provision of this type of service.
- **Counselors should make client aware of the Residential Dwelling Accessibility (DAT) Tax Credit.**
- ~~Senior counselors with plan approval may approve home modifications costing less than \$7500.~~
- ~~The District Supervisor must approve all modifications for all counselors who do not have plan approval. The district supervisor must approve all home modifications costing more than \$7500.~~
- **The District Supervisor will review and approve all initial plans prior to service and will approve all plans for services costing \$10,000.00 or more. Exception: Assistant Supervisor and Counselor IV will be exempt from these plan reviews.**
- Counselors should maintain at least monthly contact with the client and vendor(s) when developing and implementing a plan for services involving home modification and/or remodeling to ensure informed choice and satisfaction, as well as appropriate service provision.

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1910.3 Procedure

- Document informed choice regarding the client’s vocational goal selection and choice of home modification and/or remodeling.
- Collect required financial documentation, obtain price quotes/written appraisals (if appropriate); and place documentation in the financial section of the case folder.
- Complete the Cost Worksheet, and document any client contribution, if appropriate.
- Follow current Ticket-To-Work Procedure, if appropriate.
- Review IPE and associated addendums/responsibilities with client.
- Clients must agree to and sign Client Responsibilities, ~~“Tools and Equipment”~~ **“Home Modifications Responsibilities”** prior to the authorization of services.
- Send a copy of the IPE/responsibilities addendum to the client, and a copy of the authorizations to the client and vendor(s).

1920 COMPUTER MODIFICATIONS OR EQUIPMENT

1920.2.3 Approval

- The provision of a computer and/or computer related adaptive equipment/modifications should be evaluated by the counselor and the district supervisor.
- Prior to authorizing, determine if the equipment will be authorized as assistive technology devices-[CSG 1170](#) or tools/equipment (see Section 1930), and:
 - search “placement equipment available list” in MoRIS and/or
 - contact the “agency legacy” to determine availability of surplus computers
- ~~• Senior counselors with plan approval may approve the purchase of computer equipment costing less than \$1500.~~
- ~~• The district supervisor must approve the purchase of computer equipment for all counselors who do not have plan approval, and/or items costing more than \$1500.~~
- **The District Supervisor will review and approve all initial plans prior to service and will approve all plans for services costing \$10,000.00 or more. Exception: Assistant Supervisor and Counselor IV will be exempt from these plan reviews.**

1920.2.4 Price Quotations

- Obtain written price quotations from at least two (2) vendors, and prepare to authorize services based upon the lesser price quote, unless the client chooses to

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purchase equipment from the higher priced vendor, and agrees to pay the difference between the two price quotes. *If there are individual circumstances that prevent obtaining a second bid or there is not a vendor available to obtain a second bid in the area where the client resides, this needs to be documented in the file.*

1930 TOOLS, EQUIPMENT, INITIAL STOCKS

1930.3.2 Initial Considerations

- VR may provide occupational tools, equipment and initial stocks for a client to achieve their employment objective, providing the following conditions have been met and documented in the file:
 - **Managerial ability** - the client has the proper skill and managerial ability to succeed in the trade or occupation for which the services are provided.
 - **Resources** - the client has adequate resources available for the proper maintenance and upkeep of tools/equipment/stocks
 - **Financial eligibility** - the client meets VR financial need requirements.
 - **Self-employment** – [CSG 1000](#)
- The provision of placement tools/equipment, and initial stocks should be thoroughly evaluated by the counselor and the district supervisor. The evaluation should include on-site visits and any other activity which may be required to justify the provision of this type of service.
- Prior to authorizing, search available equipment list in MoRIS.
- ~~Senior counselors with plan approval may approve the purchase of tools/equipment or initial stocks costing less than \$5000.~~
- ~~The district supervisor must approve the purchase of tools/equipment or initial stocks for all counselors who do not have plan approval, and/or items costing more than \$5000.~~
- *The District Supervisor will review and approve all initial plans prior to service and will approve all plans for services costing \$10,000.00 or more. Exception: Assistant Supervisor and Counselor IV will be exempt from these plan reviews.*

CHAPTER 20 - OTHER SERVICES

2000 INTERPRETER AND NOTE-TAKING SERVICES

2000.5 Procedure (continued)

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- The District Supervisor will review and approve all initial plans prior to service and will approve all plans for services costing \$10,000.00 or more. *Exception: Assistant Supervisor and Counselor IV will be exempt from these plan reviews.*
- Verify services have been provided and complete appropriate status move.
- Contact client by phone or in person immediately after receipt of services, and follow up to ensure client satisfaction with services provided.
- Move to Status 22 when client has satisfactorily maintained/obtained employment.
- There must be documentation reflecting substantial services leading to a positive employment outcome before the case is closed successfully.
- When the client has been successfully employed for 90 days and has been contacted to verify job satisfaction, the case may be closed Status 26.

2010 Personal Attendant Care Services

2010.5 Procedure

- Document informed choice regarding the selection of attendant(s).
- Search for and apply all comparable services/benefits.
- Prepare an authorization in accordance with fees listed in the VR Fee Schedule (Estimated and Miscellaneous Fees), or the actual cost of services, whichever is less.
- Meet with the client to review and discuss client responsibilities regarding a personal care attendant, provide copies of the attendant care time sheets, sign the IPE, if it is an IPE-related service, complete CCA and/or TTW, as appropriate.
- The District Supervisor will review and approve all initial plans prior to service and will approve all plans for services costing \$10,000.00 or more. *Exception: Assistant Supervisor and Counselor IV will be exempt from these plan reviews.*
- Verify services have been provided and complete appropriate status move.
- Contact client by phone or in person immediately after receipt of services, and follow up to ensure client satisfaction with services provided.

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2020 SERVICES TO FAMILY MEMBERS

2020.4 Procedure (continued)

- Prepare an authorization, in association with either an IPE or as a non-IPE diagnostic service if the case is in Status 10 or 24. Please note if case is in Status 18, and training is interrupted, childcare services will not be provided.
- *The District Supervisor will review and approve all initial plans prior to service and will approve all plans for services costing \$10,000.00 or more. Exception: Assistant Supervisor and Counselor IV will be exempt from these plan reviews.*
- Contact client by phone or in person to verify services have been provided, and follow up to ensure client satisfaction.
- Move to Status 22 when client has satisfactorily maintained/obtained employment, and verify when services to family members will cease.
- There must be documentation reflecting substantial services leading to a positive employment outcome before the case is closed successfully.
- When the client has been successfully employed for 90 days and has been contacted to verify job satisfaction, the case may be closed Status 26.