

2400 INTAKE AND CASE MANAGEMENT

2401 Community Outreach and Referral Source Development. The Division will develop and maintain relationships with organizations, agencies and persons in the community to obtain appropriate, timely referral of such individuals for rehabilitation services. Division staff members shall inform referral sources of services offered by the Division; policies and procedures related to the order of selection; application requirements; and, the need to provide current medical, social, vocational, and other pertinent information for determining eligibility and priority of services. Division brochures will be provided to referral sources, and a Division staff person will be assigned to serve as a liaison to the referral source as appropriate.

2402 Referral Procedure. The Division will establish and maintain processes which ensure that referrals are accepted, assigned, and registered promptly and equitably. Contact will be initiated to all referred individuals, including SSI or SSDI allowed referrals, within ten working days of receipt of the referral. The following types of referrals are not to be considered for application:

A. A person already on the rolls of the Division in statuses 02 through 07, 10 through 24, or 32; or,

B. A person who is incarcerated with no firm release date or firm date of parole unless the individual is in a work release program. For an incarcerated individual with a firm release date or firm date of parole, the application is to be initiated no sooner than 180 days but no less than 90 days prior to the scheduled release. Exceptions may be granted at the discretion of the District Manager.

2403 Scheduling Initial Interviews. As soon as possible after referral, an initial interview will be scheduled with the individual and, as appropriate, the individual's representative. The individual will be advised to bring all relevant medical, educational, and employment information to the initial interview in order to expedite eligibility determination and assignment to an order of selection category. Special needs, particularly those that would affect the exchange of information, i.e., need for translator, interpreter, or alternate format, shall be addressed.

2404 Required Content of Initial Interview. At the time of intake, the individual and/or the individual's representative will be advised of the following:

2404.1 Available Services. A knowledgeable staff member shall explain the rehabilitation process and services available through the Division. If not previously provided, relevant brochures will be offered to the individual.

2404.2 Emphasis on Employment. When the individual applies for vocational rehabilitation (VR) services, a staff member shall emphasize at the initial meeting and in subsequent contacts that the primary objective is achievement of competitive employment.

2404.3 Non-Discrimination. A Division staff member shall notify the individual orally or in writing that the Division complies with the Civil Rights Act and the Americans with Disabilities Act and does not discriminate on the basis of sex, race, religion, color, age, national origin, residence, physical or mental disability, or political affiliation in determining eligibility and in providing services.

2404.4 Rights and Responsibilities. A staff member shall inform individuals in the appropriate mode of communication of:

A. Their rights, including the appeal process, availability of the Client Assistance Program (CAP), and confidentiality;

B. The responsibility of the individual or family for financial participation in the cost of services to be arranged or provided if appropriate; and,

C. The right and responsibility to fully participate in selection of the:

1. Rehabilitation goal;

2. Objectives and services required to meet the goal; and,

3. Providers of services.

2404.5 Required Signatures. A staff member shall explain that if the individual is not yet eighteen years of age or has a legal guardian, all forms requiring signature of the applicant or eligible individual shall be signed by the parent, guardian, or the individual's representative.

2404.6 Order of Selection. For individuals interested in VR services, a staff member shall explain the order of selection policy including the order of selection categories and which categories are currently being served.

2404.7 Financial Participation. A staff member shall explain the Division's policy and procedures related to financial need, participation, and use of comparable benefits. It shall be emphasized that the Division will pay only for those services that have been preauthorized by a signed Division purchase document(s).

2404.8 Need for Information. A staff member shall explain the need for information related to determination of eligibility, assessment of rehabilitation needs, and financial participation. Emphasis will be placed on self-reporting and obtaining existing information. The procedure for obtaining existing information from other sources through use of the *Request for Information* form will be described. Information related to the collection and dissemination of information, as stated on the *WVDRS Statement of Application* shall be discussed.

2404.9 Application for Services. A staff member shall describe the application process and request that the individual or the individual's representative complete and sign the *WVDRS Statement of Application* if interested in receiving rehabilitation services. The individual will be advised that eligibility will be determined within 60 days after the completed and signed application is received by the Division unless there are special circumstances.

2404.10 Centers for Independent Living (CIL) Referral. Verbal and written information about centers for independent living (CILs) will be provided to each individual during the intake process. This information will explain how the individual could benefit from CIL services. If the individual lives within a CIL service area, a formal referral will be made if the individual expresses interest.

2405 Review of Information/Self-Report. The assigned Rehabilitation Counselor will meet with the individual to discuss information related to background, career aspirations, preferences, capabilities, limitations, accommodations, and other matters related to employment and/or independence. They will review the *Rehabilitation Application Packet*, including the *Economic Resources* survey and the *Health Assessment Questionnaire*. The Rehabilitation Counselor will advise the individual about additional community resources which may be of assistance to the individual during the rehabilitation program and will provide guidance in referral to such resources.

2406 Counseling and Guidance. The Rehabilitation Counselor will develop a collaborative relationship with each applicant and eligible individual and will

promote the individual's full involvement and participation in the rehabilitation process. The Rehabilitation Counselor's role in providing information about and guiding the individual in exploration of options is critical to supporting informed choice of the individual. The Rehabilitation Counselor will provide encouragement, support, and assistance with problem solving and clarification of values, as well as information about and referral to community resources and coordination of services. The employment goal will be emphasized in contacts with the individual throughout the rehabilitation process. Regular contacts will occur throughout the individual's rehabilitation program.

2407 Registration of Applicant. Based on information provided on the *Social Profile*, a Division staff member shall collect the information required for federal reporting purposes and register the applicant.

2408 Case Statuses. Case statuses indicate the movement of a case from application to closure. This movement will occur in a timely manner and according to the needs of the individual and capabilities/resources of the Division.

2409 Staffings. Staffings will be conducted as determined necessary by the Rehabilitation Counselor or supervisor, at the request of the applicant or eligible individual or, as appropriate, the individual's representative.

2410 Record of Services. The record of services will contain documentation related to eligibility determination and the provision of services to the individual. Information provided by Division staff will be factual, legible, and objective. The appropriate section for *Actions/Details* will be used to document contacts and relevant information. The individual's current status will be evident from the information in the record. Information will be placed in the file chronologically, beginning with the most recent.

2411 Transfer of Record of Services. If a case transfer is requested or otherwise necessary, a record of services will be transferred based upon the residence of the individual, the nature of the individual's disability, and the individual's best interests. The transfer will be accomplished as follows:

A. *Transfer Based Upon Residence*

1. The Rehabilitation Counselor shall discuss the transfer with the individual and the receiving Rehabilitation Counselor, except for referrals where contact with the individual has not yet been made.

2. The Rehabilitation Counselor shall complete an up to date summary including reason for transfer, in *Actions / Details*.

B. *Transfer to Specialty Territories.* Individuals who are determined to be appropriate for a special caseload should be transferred promptly to the proper specialty Rehabilitation Counselor. The referral will include, if available; name, address, phone number, Social Security number, date of birth, directions to home address, and a brief summary of the stated disability.

1. *Rehabilitation Counselor for the Blind and Visually Impaired.* This Counselor will review all ophthalmological and optometric evaluations obtained in the district and assign appropriate disability codes prior to determining the individual's eligibility. The Rehabilitation Counselor for the Blind and Visually Impaired will provide consultative services to other Rehabilitation Counselors within the district.

a. Each case with an impairment Code 01 (Blindness) or an impairment Code 02 (Visual Impairment) in which the client meets the other eligibility criteria for vision impairment, at or subsequent to referral will be transferred to the Rehabilitation Counselor for the Blind and Visually Impaired.

b. At discretion of the District Manager, the Rehabilitation Counselor for the Blind and Visually Impaired may recommend that selected cases with special visual accommodation needs be transferred to the specialty territory.

c. Cases referred from the West Virginia School for the Blind usually will be served by the Rehabilitation Counselor for the Blind and Visually Impaired.

2. *Role of Counselor for the Deaf and Coding*

a. RCD. Each District has a Rehabilitation Counselor for the Deaf, Hard of Hearing, and Deaf Blind (RCD) who is specially trained in the areas of deafness, hearing loss, and deaf blindness. The RCD reviews all audiological and otological evaluations obtained in the district and assigns appropriate disability codes prior to determination of the applicant's eligibility.

b. *RCD as Counselor of Record.* The RCD will consult with the District Manager to review any case recommended for transfer to a general field counselor. The RCD will serve as the Counselor of Record (COR) when any of the following criteria are met:

(1) Any client with a hearing loss of 55 dB or greater in the better ear should be served by the RCD; or

(2) Any case in which a Cochlear Implant (CI) and/or a BAHA implant is recommended as treatment should be served by the RCD; or

(3) Any case in which the client uses ASL as their primary form of communication or any case in which the hearing loss is progressive; or

(4) Any case in which the client may require accommodations in the classroom and/or workplace such as a FM system, interpreter, computer-aided transcription services such as Communication Access Realtime Translation (CART); or

(5) Any case in which the client is a first time wearer of hearing aids; or

(6) The deafblind individual is either legally blind or has a condition of progressive visual loss which has been verified by a physician skilled in disease of the eye and as such blindness may result. Also, the individual has a hearing impairment of 55db (ANSI) or more, unaided for either speech reception threshold (SRT) or pure tone average (PTA) in the better ear; or impairment between 30-54 db (ANSI), unaided, for either SRT or PTA in the better ear and either speech discrimination less than 50 percent or a statement by a physician skilled in disease of the ear indicating progressive loss.

(7) Cases referred from the West Virginia School for the Deaf usually will be served by the Rehabilitation Counselor for the Deaf.

3. *Specialty Rehabilitation Counselors for the School System.* The Rehabilitation Counselor for the Transition Program will provide consultation services to other Rehabilitation Counselors in the district regarding educational concerns within the secondary school system and may, upon request, serve any case involving a secondary school student. Students with severe sensory

impairments will be referred to the Rehabilitation Counselor for the Deaf and Hard of Hearing and/or the Rehabilitation Counselor for the Blind and Visually Impaired for consultation and determination of placement. In the instance of severe sensory impairments, collaboration between the two specialty Rehabilitation Counselors will be necessary. Transfer of cases to the specialty transition territory ordinarily should result from consultation and agreement between the Transition Program Rehabilitation Counselor and the general or other specialty Rehabilitation Counselor. At the discretion of the District Manager, the Rehabilitation Counselor for the Transition Program may recommend that selected applicants or transition students be transferred to the transition territory.