

Action Request Transmittal

Select originating program



Howard Fulk, Policy and Training Manager

Authorized signature

Number: VR-AR 20-04

Issue date: 11/19/2020

Topic: Other

Due date: 11/19/2020

Subject: Updated VR Virtual or Phone Meeting Guidance in Response to Executive Order 20-12

Applies to (check all that apply):

- | | |
|--|--|
| <input type="checkbox"/> All DHS employees | <input type="checkbox"/> County Mental Health Directors |
| <input type="checkbox"/> Area Agencies on Aging: {Select type} | <input type="checkbox"/> Health Services |
| <input type="checkbox"/> Aging and People with Disabilities | <input type="checkbox"/> Office of Developmental Disabilities Services (ODDS) |
| <input type="checkbox"/> Self Sufficiency Programs | <input type="checkbox"/> ODDS Children's Intensive In Home Services |
| <input type="checkbox"/> County DD program managers | <input type="checkbox"/> Stabilization and Crisis Unit (SACU) |
| <input type="checkbox"/> Support Service Brokerage Directors | <input checked="" type="checkbox"/> Other (<i>please specify</i>): All Vocational Rehabilitation staff |
| <input type="checkbox"/> ODDS Children's Residential Services | |
| <input type="checkbox"/> Child Welfare Programs | |

ACTION REQUIRED:

This updated Action Request (AR) describes measures Oregon Vocational Rehabilitation (VR) undertakes as we continue to provide services in accordance with [Executive Order 20-12](#), "Stay Home, Save Lives" and replaces previous guidance issued under the same title. Effective immediately, and continuing until this directive is rescinded, field staff will follow this guidance.

Please note that additional guidance surrounding virtual intakes, virtual meetings, and documentation requirements can be found in VR-AR 20-07 and 20-09 dated 11/13/2020.

Any questions surrounding procedures outside of this Action Request should be addressed to your branch manager.

REASON FOR ACTION:

Due to the ongoing COVID-19 crisis, Vocational Rehabilitation has incorporated many changes to how we do business to ensure our continued and ongoing services to Oregonians with Disabilities. These changes are to fulfill federal performance expectations for the program and meet health and safety considerations.

Per Rehabilitation Services Administration (RSA) guidance, State VR programs should:

- Continue to provide service delivery, and
- Meet established timelines for eligibility, plan development and plan revisions.

One method VR can utilize to continue to meet our obligations is using virtual meetings. To the greatest extent possible, all meetings should be conducted either virtually or telephonically.

Safety and caution are paramount. The health and safety of participants, advocates, community partners, vendors and VR Staff are of utmost importance during this crisis. Every effort must be made to protect everyone involved.

PROCEDURES:

Virtual and/or Telephonic Meetings:

All applicant, client, and vendor meetings should be conducted virtually to the greatest extent possible. This includes routine and required check-ins with current VR clients.

We recognize the importance of the counselor and client face-to-face interactions to build rapport. Further, we understand the challenges and consternation that these interim measures may cause. Please recognize that these measures exist solely to continue to provide essential services to Oregonians with Disabilities, while we comply with the [Governor's Executive Order 20-12](#).

Providing Accommodation

Vocational Rehabilitation staff are responsible for, and must ensure that:

- Any needed accommodations are provided to individuals seeking to engage with our program.
- If spoken language interpreting, CART captioning or sign language accommodations are needed, the vocational rehabilitation counselor (VRC) should coordinate with [Sheila Hoover](#) to ensure these services are available in a timely fashion.

Starting the Application Process

If the potential applicant has access to email:

- Forms need not be provided to the applicant prior to the virtual intake.

- The [Application for Services Webform](#) contains all the documents needed.
- When using the Application for Services Webform, application, orientation and intake documents are embedded in the document and are reviewed real-time during the virtual intake itself.
- Go to the next step, “[Completing the Application](#)” below.

OR

If the potential applicant DOES NOT have access to email:

- All forms that may be covered during the meeting should be completed in draft and mailed to the applicant prior to the meeting if possible.
 - Prior to sending any correspondence to an individual:
 - Please verify with the person their ability to receive mail, and,
 - Obtain their permission to send documents to them via the USPS.
 - Case note this information in their case file, and
 - Document any special handling instructions the individual may request.
 - Always supply a self-addressed pre-paid envelope to return of any documentation that may be required.

Completing the Application:

During the virtual meeting, counselors should seek client involvement just as if the meeting were taking place within the VR office setting.

- **Note:** Lack of comment from the client does not always constitute understanding or consent.
- VR staff should seek and obtain the applicant’s confirmation during each step of the process. VRCs should case note this exchange and clearly document the client’s response as necessary.
- Additionally, should changes be required to any documentation, VRCs must also seek confirmation from the client that they agree, and case note this agreement as necessary.

If the potential applicant has access to email:

- All documents for application are embedded in the [Application for Services Webform](#).
- Documents on the [Application for Services Webform](#) are reviewed real time during the intake just as any other intake. The VRC will enter data and information the potential applicant provides.
 - The MSC 3010VR is completed in real-time during the intake. The webform gathers the required signatures. The ROIs are attached to the webform and signed via Adobe Sign.

- After the virtual intake the counselor will generate an email to the client via the webform. (The email will be sent by OR Dept. of Human Services ODHS – echosign@echosign.com) The potential applicant will be able to access and sign the documents using Adobe Sign.
 - No exchange of forms via USPS is required for this process.
- Required documents and optional brochures requested by the potential applicant during the virtual intake will be mailed directly from the Publications and Creative Services warehouse based on selections made within the webform.

NOTE: The only form VR staff may need to mail after a virtual intake is the SEL503 (Voter Registration/Declination Form).

- The SEL503 information is gathered during the virtual intake.
- If the applicant is unable to print the form for the required wet signature and submit to their county elections office, then mail a hard or paper copy of the SEL503 to the individual.
- In this case, include a self-addressed, prepaid envelope to facilitate the timely return of the SEL503.

OR

If the applicant DOES NOT have access to email:

- Following the completion of the meeting:
 - If there are documents that need to be signed, those should be completed, signed and then dated by the counselor, and mailed to the client for their signature.
 - A self-addressed, prepaid envelope should be included to facilitate the timely return of all necessary documentation.
- Please see attached [flowchart](#) for additional guidance.

Email and Security

If the potential applicant has access to email:

The Application for Services webform should significantly reduce the need to email information to potential applicant for the initial intake.

If emailing the documentation is an accommodation or more convenient for the applicant, documentation may be shared through one of the following methods and the printed and signed document returned to VR via a self-addressed, prepaid envelope provided to the individual.

- **Note:** Always send these files securely by using the **#secure#** tag in the email subject line.

- Documents may be scanned and emailed from the VRC's office: Note, this does not include Authorizations for Purchase (AFP's). These will be addressed in future guidance.
- Documents may be scanned using the Microsoft Lens Application on your State iPhone and emailed from the members state email account.
 - Texting the document as an attachment is not permitted
 - Use of a personal email account by the VRC is not permitted

Return completed documents using Adobe Sign

If the potential applicant has access to email:

- The Application for Services webform documentation containing signatures returned with the potential applicant's signatures is sent to the VRC's state email address.
- No physical copies are exchanged.
- The VRC must print the completed Application and ROIs to place in the record of service.

Return completed documents to the VR office

If the potential applicant DOES NOT have access to email:

- Completed, signed documentation should be returned to the VR office and not to the VRC's home.
- Once this documentation has been received by VR, all information must be entered into ORCA within one-business day of receipt.
- Original documents should continue to be handled in the same manner as previously, and,
- Document handling procedures are not amended by this Action Request.

Documenting delays in case notes

When, due to delays incurred in mailing, there are discrepancies between the date a VRC signs a document and the participant signs the document, the VRC must case note the receipt of the client's signature page into ORCA and file that copy in the case service record.

Case Note Example

Entry Date: <Date of actual Virtual/Phone Meeting and Agreement> Category: Other or Phone Call

Summary: Virtual Meeting for <Enter reason for meeting> Phone Meeting for <Enter reason for meeting>

Enter Case Note:

Under the interim guidance of VR-AR-20-04, and in compliance with the Governor's Executive Order 20-12 requiring mandatory personal distancing,

<a virtual/telephonic> meeting was conducted. <State what actions were taken and specifically list any documents mailed/received and what that next steps will be> The client also understands, by verbal confirmation, that <state what client has agreed to>

The client verbally attested that upon receipt of <state what documents were mailed to the client if applicable> **OR** <that all documents shared via Adobe Sign with the client if applicable>, they will sign and <mail the signature page back to VR within two business days of receipt> **OR** <return using Adobe Sign within two business days of email receipt>.

In Person Signature Meetings:

If an individual prefers to sign documents in person at the VR office, office visits for client signature will be handled by appointment only.

- A daily schedule of these appointments should be shared with staff onsite.
- Personal distancing and related coronavirus prevention and management measures will always be maintained.

When preparing documents in the office to be given to the client by another staffer, use client first name/last initial for identification purposes only.

- Include client's cell phone/email address in case office staff need to reach the client.

Client signature appointments should last no longer than 10 minutes.

- Discuss this timeline with the individual when the appointment is made.
- No other VR business should be conducted during the in-person appointment.
- The staff member obtaining or facilitating the signature does not need to be the VR Counselor of record.

To maintain confidentiality, documents for signature should be placed in individual envelopes marked with the:

- Appointment date/time;
- The client's first name and last initial; and,
- The VRC's name (to assist the signed document being returned to the correct caseload/file).

These envelopes should be maintained at a central location in the branch.

Clients are not to loiter in the office before or after the document has been signed. Clients will be escorted to and from the entrance of the office by whomever is on duty to unlock and re-secure the front doors.

If there are more than one client coming in for appointments, then they should be allowed to enter one-at-a-time for completion of paperwork.

- Individuals who are waiting can wait outside the office, or, give their cell phone number and wait in their vehicle and,
- VR staff can call them to come into the office when they are available for the next appointment.

Staff on duty to facilitate client signatures should be rotated.

- No specific classification or staff member is to be designated as solely responsible for covering this duty.
- Rotating staff members assigned to cover client signature appointments manages infection risk for all staff onsite.

Branch staff may choose to create a specific area near the entry to manage client signatures and limit exposure within the office.

- This area must meet ADA accessibility and COVID-19 protection precaution rules and standards.

Field/stakeholder review: Yes No
VR Executive Team, Branch Managers, Field Staff, VR-
If yes, reviewed by: SRC Policy Committee

If you have any questions about this action request, contact:

Contact(s): VR.Policy@dhsoha.state.or.us	
Phone:	Fax:
Email: VR.Policy@dhsoha.state.or.us	

Attachment: Flow chart

- See next page

PLAN EXTENSION, PLAN, AND PLAN REVISIONS

