

Action Request Transmittal Vocational Rehabilitation



Howard Fulk, Policy and Training Manager

Number: VR-AR 20-04

Authorized signature

Issue date: 04/01/2022 rev

Topic: Other

Due date: 04/01/2022

Subject: UPDATED VR Virtual or Phone Meeting Guidance

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	<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
<input type="checkbox"/>	Support Service Brokerage Directors	<input type="checkbox"/>	(SACU) Child Welfare Programs
<input type="checkbox"/>	ODDS Children’s Residential Services	<input checked="" type="checkbox"/>	Other: Vocational Rehabilitation

ACTION REQUIRED:

As of May 1, 2022, in-person meetings are strongly encouraged.

Virtual meetings are permissible if requested by, or in the best interest of, the client.

REASON FOR ACTION:

Vocational Rehabilitation has made several changes to assure service delivery to Oregonians with disabilities continued over the past two years.

One important change the Program made was to provide virtual meetings. This change helped fulfill federal performance expectations for the program and met health and safety considerations.

PROCEDURES:

Conducting virtual meetings:

Vocational Rehabilitation 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 VRC should coordinate with Sheila Hoover to ensure these services are available in a timely fashion.
- 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.

- During the meeting, counselors should:
 - Seek client involvement just as it would be 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 client'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.

- 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 or sent via secure email for electronic signature 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:

Printed and signed documents may be returned to VR via a self-addressed, prepaid envelope provided to the individual.

If emailing documents is more convenient for the applicant, documentation may be shared through one of the following methods.

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

- Documents may be scanned and emailed from the VR office:

Note: this does not include Authorizations for Purchase (AFPs).

- AFPs are addressed in VR-AR 20-05 and VR-AR 20-08

Documents may be scanned using the Microsoft Lens Application on your State iPhone and emailed from the staff's state email account.

- Texting the document as an attachment is not permitted
- Use of a personal email account by the VRC is not permitted

Printing and storing confidential documentation

It is understood that during telework situations, some documents may need to be generated at a VR employees place of residence.

- Under no circumstances should any information be stored or maintained on a personally owned computer, tablet or other electronic device.
- Confidential work should be done via remote desktop or Citrix application,
- All draft, working copy or final copy documents will be stored on the users work computer, not their home device.

As an example, if documents must be printed and mailed, they should be printed and immediately placed in the mailing envelope and sealed for posting. It is preferred to have documents electronically generated and sent to the office for printing, if possible.

Return completed documents to the VR office

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 done previously, and,
- Document handling procedures are not amended by this Action Request.

Document any delays in case notes

There are discrepancies between the date a VRC signs a document, mails it to the participant to sign, and the document is returned by mail. When this occurs, the VRC will case note the receipt of the client's signature page in 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 Governors 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>, they will sign and mail the signature page back to VR within two business days of receipt.

In person signature meetings:

An individual may sign documents in person at the VR Office.

Office visits for client signature will be handled by that VR office.

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.

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.

Access

Any specific area near the entry to manage client signatures or other specific tasks must meet:

- Americans with Disability Act accessibility requirements for public buildings, and,
- COVID-19 protection precaution rules and standards (see [Bureau of Labor and Industries or BOLI](#)).

REFERENCES

[Americans with Disabilities Act Title III Regulations. Part 36 Nondiscrimination on the Basis of Disability in Public Accommodations and Commercial Facilities. \(Current as of January 17, 2017\)](#)

[Bureau of Labor and Industries \(BOLI\) Covid-19 Resources.](#)

[Oregon Department of Administrative Services. Building Closure Notices.](#)

[Oregon Health Authority. Mask Recommendations & Requirements.](#)

Field/stakeholder review: Yes No

If yes, reviewed by VR Executive Team, Branch Managers, Field Staff, BIC's

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

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