

CASE PROCESS FOR RESOURCE SPECIALISTS

REVISED: 04/01/06

Within the Division of Services for the Blind, the Resource Specialist is the staff person designated to provide specialized services to consumers referred by Social Workers for the Blind or by other Resource Specialists. **These referrals are made for persons needing services requiring intensive consumer-teacher skills training over an extended period of time.** Resource Specialists are:

- **Orientation and Mobility Specialists** provide specialized services in orientation, mobility and cane techniques to consumers of all ages.
- **Nursing Eye Care Consultants** evaluate special vision needs of consumers and recommend adaptive optical aids and equipment when needed. The Case Process outlined in this section is not applicable to the service delivery process of the NECCs; therefore, reference to their responsibilities is not included in this section.
- **Independent Living Rehabilitation Counselors** provide extensive skills training in teaching the demands of daily living to consumers of all ages.
- **Vocational Rehabilitation Counselors** provide services relating to vocational/employment goals of consumers. There are five basic steps in the Independent Living Services case process. These steps are:

I. Receipt of Referrals from Social Worker for the Blind or Other Resource Specialist(s)

II. Assessment of Consumer Needs (diagnostic study)

III. Service Plan Development

IV. Delivery of Consumer Services

V. Case Closure

I. RECEIPT OF REFERRALS

A. What Constitutes a Complete Referral?

Referrals for extensive skills training are usually received from the Social Worker for the Blind but may come from another Resource Specialist as explained in Item III B. of this section. A complete referral consists of **all** the following required documents.

1. Documentation of Vision Status:

Documentation must be in the form of DSB-2202: Report of Eye Examination or a written statement as outlined in Section 250, item I. D. of this Manual; **and**

2. Documentation of Service Need:

Documentation consists of a copy of the completed and signed

DSB-7103: Independent Living Services Assessment and Plan; **and**

3. Other Documentation:

Copies of all other available data on the consumer's social, psychological, economic and medical conditions that may be presenting barriers to his/her independence.

A referral is not complete until the eye report and DSB-7103 are received by the Resource Specialist.

B. What to Do If Referral Documents Are Not Complete

If a referral is not complete (meaning that either the Eye Report or DSB-7103 is not included), the Resource Specialist will take the following steps **before** accepting the referral:

1. Submit a written request to the referring staff member asking for the omitted eligibility documentation. This request is mandatory because the Resource Specialist cannot initiate consumer contact and conduct the needs assessment until **both** referral documents have been received.
2. Make follow-up request(s), as necessary. If after a maximum of 90 calendar days the referring staff member has not submitted the required Data, place the referral in Status 08: Rejected.

C. Contacting Referrals

The Resource Specialist must contact the referral within 30 calendar days after referral is received in the regional/district office. Contact may be made in person, by phone or by letter. Regardless of contact method, the Resource Specialist must provide written documentation of the contact to the Social Worker for the Blind as soon as possible stating the projected date for needs assessment.

D. Assigning Consumer Status

1. Status 00: Referral

All referred individuals will be reported in the Electronic Services System in Status 00: Referral. This placement in Status 00 will be made for all referrals even though the Resource Specialist may need to close out some referrals almost immediately because they are inappropriate for specialized services or for other reasons.

2. Status 08: Rejected

This status identifies all referrals in Status 00 who were not accepted for services by the Resource Specialist. This decision for rejection may come **before** or **at the completion** of the referral's needs assessment or diagnostic study.

Examples of when the Resource Specialist could close the referral in Status 08: Rejected **before** completing the needs assessment are:

- a. The referral has died; or
- b. The referral has moved to a location beyond the Resource Specialist's jurisdiction; or
- c. The Resource Specialist has been unable to locate the referral.

If the referral is rejected for specialized services training, the Resource Specialist will send a copy of the Rejection Summary to the Social Worker for the Blind and, if applicable, to the referring Resource Specialist. Retain original of Rejection Summary in consumer's case record or designated "rejected referrals" file.

By this stage in the case process, the Resource Specialist will have made one of the following decisions:

- close the referral in Status 08: Rejected because the
- individual is not appropriate for extensive services; • or
- continue investigation of the referral in Status 00 when
- doubts of appropriateness for services exist; **or**
- accept the referral as a consumer and initiate needs assessment for **extensive** independent living services.

II. NEEDS ASSESSMENT

A. Personal Interview

When all referral documents have been received and evaluated, the Resource Specialist will meet with the consumer for a personal interview. During this interview the consumer serves as the principal source of information about himself/herself and his/her service needs. This interview introduces the consumer to the specialized services of the agency and explains in detail how these specialized services can help him/her overcome barriers personal independence. The Resource Specialist will use good counseling techniques to establish rapport with the consumer as he/she seeks to develop a mutually supportive working relationship. It is important during this interview that the Resource Specialist confirms the person's desire and capacities for specialized skills training. The interview should provide answers to the following questions:

1. What specialized services does the consumer wish? Need?
2. Is the consumer currently involved with any agencies with whom DSB should coordinate services or keep in contact? Any involvement with such agencies in the past?
3. What is the Resource Specialist's impression of the consumer's current disabilities and limitations? Physical? Emotional?
4. Has consumer adjusted to his/her decreased independence and blindness?

5. Is the consumer currently under the care of any physician? If so, for what? Any medications? Any history of past disability?

6. What are the consumer's job interests, expectations or Vocational objectives, if any?

7. What is the Resource Specialist's estimate of consumer's motivation for services?

B. Assigning Consumer Status After Conducting Needs Assessment

1. Status 08: Rejected : When a consumer is rejected for services the Resource Specialist will send a copy of the Rejection Summary to the Case Manager and, if applicable, to the other referring Resource Specialist. Retain original of Rejection Summary in consumer's case record or designated Rejected Referrals file. Examples of when the Resource Specialist may close a case as rejected after completing the needs assessment are:

a. **The consumer's service needs are only for basic instruction in such areas as use of telephone, signature guide, or utilization of library resources for the blind. Basic services such as these are provided by the Social Worker for the Blind.** Refer to Section 300, Item I, for a more comprehensive listing of basic services that the SWB provides.

b. The Resource Specialist has determined that the consumer is incapable of achieving and maintaining a higher level of substantial independent functioning.

c. The consumer needs only a cane delivered or a replacement cane.

d. The consumer's only service needs are for delivery of materials from American Printing House.

2. Status 10: Active – When the Resource Specialist accepts the referral for services, the consumer enters Status 10: Active status.

III. SERVICE PLAN DEVELOPMENT FOR REFERRALS ACCEPTED INTO ACTIVE STATUS

After the worker has confirmed that the referral meets all eligibility requirements and has completed the needs assessment, he/she will develop a Resource Specialist Service Plan (either DSB-7103B, DSB-7103C or DSB-7103D). Refer to section 500 for forms and instructions. At this point in the case process, the referral enters Active Status for specialized services by the Resource Specialist. The Service Plan will focus on the benefits to be expected from the provision of specialized services—orientation, mobility, independent living rehabilitation services and/or vocational/employment services. These services will have the effect of correcting, compensating for or circumventing barriers to independent living.

A. Time Frame for Developing Resource Specialist Service Plan

The Resource Specialist must complete the Service Plan as soon as possible after receiving the referral and conducting the needs assessment so that service delivery is initiated **no later than 90 calendar days** after the referral was received in the regional/district office of DSB.

B. Referral to Additional Resource Specialist

During this stage of Service Plan Development or later during Step IV: Implementation of Service Delivery, the Resource Specialist may decide the consumer could benefit from services in a specialty area other than his/her own. For example, the Independent Living Rehabilitation Counselor may determine that the person to whom he/she is teaching homemaking skills could gain more benefit from the skills training if he/she could also receive orientation and mobility training from an Orientation and Mobility Specialist. If this decision is made, the Resource Specialist will refer the consumer to a second Resource Specialist in a different specialty area. As with all referrals, the referring Specialist must assume responsibility for forwarding all referral documents to the second Resource Specialist (see Section 310, item I. A. "What Constitutes a Complete Referral?") In turn, the second Resource Specialist becomes Case Manager for his respective service specialty and will forward case recording to the referring Case Manager.

IV. IMPLEMENTING SERVICE DELIVERY

Goal-oriented service delivery is initiated based on the following criteria for effectiveness:

- To provide individualized specialized services that significantly increase the consumer's capacities and abilities to be independent.
- To teach consumer skills and to provide individualized services that lead to higher levels of independence.

Time Frames for Service Delivery by Resource Specialists: All services listed on DSB-7103B, DSB-7103C, and DSB-7103D must be planned and **service delivery initiated within 90 calendar days after referral is received in the Regional/District Office of Division of Services for the Blind.**

V. CASE CLOSURE

A. Successful Closure

The case is ready for successful closure (Status 49) when the Resource Specialist **and** the consumer have determined that the service objectives stated on the Resource Specialist Service Plan have been met.

B. Unsuccessful Closure

The case is closed unsuccessful (Status 48) when the Resource Specialist **and/or** the consumer determine that the service objectives stated on the Resource Specialist Service Plan will not or cannot be achieved.

C. Post Closure

A post closure (Status 32) is after a consumer has achieved an independent living outcome and a case is successfully closed, the Social Worker for the Blind may still provide specific services necessary to assist the individual to retain or regain independence. Post Closure Services are available to meet needs that do not require a complex and comprehensive provision of services and, therefore, should be limited in scope and duration. Services must be consistent with the individual's strengths, resources, priorities, abilities, interests, and informed choice.

The provision of services in Status 32 require only an amendment to the Independent Living Service Plan which includes a beginning and ending date.

Examples of Status 32- Post Closure Services:

- Assistance in attending Camp Dogwood, the VIP Fishing Tournament, etc.
- Marking new equipment/ appliances for the consumer when the items are acquired.
- Remarking items for the consumer when bump dots/ high marks have worn off or fallen off.
- Assisting consumers in accessing library services, radio reading services, other necessary community services.

*Status 32 may not be used for In-Home Level I Services or the purchase or Aids and Appliances for a consumer- The case must be reopened and eligibility predetermined.

In the ESS:

5. Select option 2 - Client Add/ Update
6. Select option 6 - ILS
7. Replace status 49 and enter Status 32 and the starting date of the service to be provided. Hit the <ENTER> key
8. You will see a field for the ending date. Enter the ending date. Hit the <ENTER> key
9. The case is now in Status 32. It will be reflected in the 'Worker Caseload List' Screen