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CASE PROCESS FOR SOCIAL WORKERS FOR THE BLIND

The Social Worker for the Blind (SWB) is the designated staff person to be Case Manager for consumers receiving services through the Independent Living Services Program in the Division of Services for the Blind. In this role the Social Worker for the Blind assumes overall responsibility for managing the consumer's ILS case using the five steps of the social case work process. These steps (**Case Finding, Eligibility Documentation, Service Plan Development, Service Implementation and Case Closure**) are outlined in this section. Case Management by the SWB involves the total spectrum of ILS service delivery whether the service is provided "hands on" by the Social Worker for the Blind or is provided by an Orientation and Mobility Specialist and/or Nursing Eye Care Consultant after referral by the SWB.

The Social Worker for the Blind is responsible for providing basic independent living services and skills training to ILS consumers. Basic independent living services are "core" services that form the foundation of the consumer's service plan. These basic services will form either the totality of services the consumer needs in order to achieve independence and self-sufficiency or will form the foundation for other services.

Determining **basic** services for consumers relies heavily upon information gathered by the Social Worker for the Blind during the consumer study at which time the consumer's needs and abilities are ascertained. During the study the SWB will learn about the consumer's physical, mental, and social environments as well as any support systems he may have through family, friends, and community. These factors play important roles in a consumer's ability and desire to achieve independence and are critical in determining if a service need is **basic** or **extensive**, the latter involving more complex needs.

What distinguishes a "basic" service from an "extensive" service?

What may be termed a **basic** service for Consumer A may be a more complex, or **extensive**, service for Consumer B even though the service name may be the same. **The discriminating factor is the level or intensity of instruction between consumer and worker.**

Basic refers to Independent Living Services and skills training for consumers that are short-term and/or require only minimal instruction. These services are provided by Social Workers for the Blind

Extensive refers to services and skills training that require direct instruction over an extended period of time. They are provided by Independent Living Rehabilitation Counselors. These services may be provided either in consumer's place of residence or in a mini-center.

A listing of Independent Living Services provided by Social Workers for the Blind is shown below, followed by examples of case scenarios that illustrate the provision of some of these services.

I. ADJUSTMENT SERVICES FOR THE BLIND AND VISUALLY IMPAIRED

A. Skills Development to Meet the Demands of Daily Living

Adjustment services are provided by the SWB to enable the consumer to meet his/her demands of daily living. Skills development is provided through special training in:

- **Grooming skills** such as separation and matching of clothing; personal hygiene; organization of personal items; labeling of articles and clothing with Braille labels or other identification method.
- **Homemaking skills** such as special cleaning techniques for home and clothing; use of laundry and cleaning equipment; cooking and serving meals; care of yards and entryways to promote general health and safety.
- **Personal skills** such as time-telling and money identification.
- **Communication skills** such as telephone dialing and use of 4-track tape player; use of writing guides for signature, check writing and addressing envelopes; accessing services from agencies such as Library for the Blind and Physically Handicapped and Radio Reading Service. Also, Braille instruction; given the shortage of qualified Braille instructors, either the SWB or ILRC may provide this service.
- **Orientation and Mobility Skills** such as training in self-protection and pre-cane techniques; use of sighted guides; and referral to Orientation and Mobility Specialists for cane techniques and electronic travel aids (ETA's).

B. Skills Development through Group Services

Adjustment Services that enhance skills development for the consumer's adjustment to and acceptance of his/her visual limitations through:

- Camping experiences at Camp Dogwood in Sherrill's Ford
- Utilizing local recreation programs
- Participating in group learning experiences and local support groups

II. HEALTH SUPPORT SERVICES

Services that assist consumers and their families to recognize health needs and to secure needed health services available under Medicaid, Medicare, maternal and child health programs or other agency health services programs and from other public or private agencies or providers of health services. These services include:

- Counseling and planning, as appropriate, with individuals, families, and health providers to help assure continuity of treatment and the carrying out of health recommendations
- Assisting individuals to secure admission to medical institutions and other health-related facilities as needed

III. INDIVIDUAL AND FAMILY ADJUSTMENT SERVICES

These services are designed to offer assistance to individuals and their family members in support of attempts to restructure or solidify the individual's environment. Activities include:

- Counseling to enable the individual to recognize, understand, and cope with problems and conflicts in regard specifically to such areas as household management, consumer affairs, money management, family life education, alcoholism, drug addiction, mental retardation, emotional disturbance, and school-related problems
- Counseling to assist individuals to independently utilize community resources, including other social services, to take advantage of natural support systems, and achieve an adequate level of functioning within the family.

IV. INFORMATION AND REFERRAL SERVICES

Information and referral services are information about services provided under the State's services program and other service programs, both public and private. Includes:

- Making a brief assessment to determine the most appropriate resource(s) to meet the stated needs of the person requesting services
- Making referral to and follow-up with those community resources that make such services available

V. IN-HOME AIDE SERVICES: LEVEL I-HOME MANAGEMENT (FORMERLY CHORE SERVICES FOR THE BLIND)

This is a paraprofessional service that assists persons with essential home management tasks such as housekeeping, cooking, and laundering. In-home aides employed by the consumer carry out these tasks. The SWB serves as Case Manager for this service and as such performs an annual review of all eligibility criteria (refer to pages 63-69).

CASE EXAMPLES

1. Consumer Needing ILS Services Only (may include Medical Eye Care Services)

Mrs. Johnson is 51 years old and has become depressed coping with her diminishing vision and her loss of independence in maintaining her home. Her husband is a manufacturer's representative and is out-of-town two or three nights each week. Their only child, Dianne, is an instructor at a college in Pennsylvania. Consumer study and needs assessment by the Social Worker for the Blind indicated a need for counseling services to enable consumer to cope with the depression and anxiety which occurred following her vision loss. This counseling enabled Mrs. Johnson to "re-discover" her former positive attitude about herself and to recognize her ability to learn adaptive skills and techniques to compensate for her vision loss.

When Mrs. Johnson's daughter Dianne returns home for her annual summer-long visit, the SWB will provide adjustment counseling to Dianne to enable her to deal with her mother's new vision status. The SWB will determine Dianne's willingness and ability to help her mother with home management tasks. The SWB assisted consumer by completing the applications for Directory Assistance and Library for the Blind and Physically Handicapped.

In accordance with the ILS Service Plan, the Social Worker for the Blind will purchase several adaptive aids and appliances for Mrs. Johnson. The Social Worker for the Blind will mark the consumer's appliances with Hi-Marks for tactile identification, provide instruction in using a check writing guide and provide a talking watch and clock as well as instruction in their use. The SWB informed her about the local VIP Support Group and encouraged her to attend. The SWB referred Mrs. Johnson to the Nursing Eye Care Consultant for a low vision evaluation. From the evaluation results, the NECC recommended sports glasses and a magnifier. Since Mrs. Johnson could not afford to purchase these adaptive devices, the SWB authorized this purchase and delivered the items to Ms. Johnson.

Mrs. Johnson is highly motivated and quickly learned to use her new adaptive aids. During the next quarterly visit, the SWB will again observe Mrs. Johnson using her

marked appliances for meal preparation and laundry as well as using her check writing guide for bill payments. At that time the worker and the consumer will determine if her goal has been met, and the worker will re-assess for additional services and/or skills training or will close the case.

CASE MANAGER DESIGNATION: Mrs. Johnson's case remains in Active Status for ILS services and SWB is Case Manager for ILS services.

2. Consumer Needing ILS Services and VR Services

Mrs. Collins is 47 years old and has recently had a heart attack. Her diabetic condition has worsened and her vision is diminishing. She lives with her husband and children. Her husband works outside the home during the day and their children are at school. During her recent convalescence at home, her husband has helped her with simple food preparation tasks such as making a cup of coffee, fixing cold cereal and microwave entrees. The Social Worker for the Blind provided a liquid level indicator, adjustable knife and jar opener as adaptive aids. The SWB also provided instruction in their use. When Mrs. Collins has regained her strength and stamina, the SWB will refer her to the orientation and mobility specialist to learn independent travel skills.

Consumer study by the SWB indicated that Mrs. Collins would not be able to resume her former occupation as a UPS driver because of her diminishing vision and heart condition. She has requested vocational services to prepare for a different field of employment when she has fully recovered from her heart attack. The Social Worker for the Blind will refer Mrs. Collins to the DSB Vocational Rehabilitation Counselor in the Rehabilitation Services Program.

CASE MANAGER DESIGNATION: Mrs. Collins will have two Case Managers concurrently. While her case remains in Active Status for ILS services, the SWB is Case Manager for these services. If Mrs. Collins is accepted for VR services, the Vocational Rehabilitation Counselor will be her Case Manager for those services.

3. Consumer Needing ILS Services, ILR Services and VR Services

Mrs. Norris is 60 years old and lives with her husband in a rural community. Her adult children and their families live near them, all within a ten-mile radius. Over the past two years her vision has become increasingly worse due to macular degeneration. Mrs. Norris, an accomplished seamstress most of her life, is finding it almost impossible to continue with her in-home business of clothing construction and alterations.

During the consumer study, the Social Worker for the Blind noted that Mrs. Norris is having a very difficult adjustment to her deteriorating vision status. Although the consumer's family is very helpful and understanding, Mrs. Norris needs additional adjustment services and emotional support. The SWB provided application forms for free Directory Assistance, Library for the Blind and Physically Handicapped and the Radio Reading Service and then completed the forms for the consumer during the recent home visit. When the SWB returns for the next visit, he/she will bring a talking watch, talking clock, signature and check writing guides and will instruct Mrs. Norris in their use. These adaptive items will provide the consumer with independence in meeting the demands of daily living.

To assist the consumer with emotional support, the SWB will arrange for her to join the local support group of blind and visually impaired persons that meets monthly at the Senior Center located about an hour's drive from Mrs. Norris' home. A local church

volunteer who gives "front door-to-Center" service will provide transportation. This group will provide Mrs. Norris with a social and recreational outlet that, hopefully, will also help her in her emotional adjustment to blindness.

Mrs. Norris feels that her most important need is to find a way to continue her clothing construction business. This business has always been not only a creative and social outlet for her but also a substantial source of income for her family. With selected adaptive equipment and instruction, she hopes to master adaptive techniques that will enable her to continue sewing. She will need adaptive items such as an electric iron guide, special needles, needle guard and thread cutter, sewing machine magnifier and special scissors. Since the adaptive equipment and instruction will require a considerable investment of time and skills training, the Social Worker for the Blind will refer her to the Independent Living Rehabilitation Counselor in the ILR program for these services. The SWB will also refer Mrs. Norris to the VR counselor for her vocational/employment needs relating to her clothing construction business.

CASE MANAGER DESIGNATION: Mrs. Norris will have three case managers...the Social Worker for the Blind for ILS services, the Independent Living Rehabilitation Counselor for ILR services and the Vocational Rehabilitation Counselor for VR services. Within the next month, however, the consumer will have met her ILS program goals and the SWB will close the case in Status 49 for Successful Closure in the ILS Program. This closure will mark the end of the SWB's current involvement as Case Manager for Mrs. Norris. She will then have two Case Managers...the Independent Living Rehabilitation Counselor for ILR services and the Vocational Rehabilitation Counselor for VR services.

STEPS FOR CASE PROCESS

A. Step 1: Case Finding

Case finding is the first step in the Case Process for Social Workers for the Blind. This step is a multi-stage process that involves reaching blind and visually impaired persons through any and all available media. It also involves interpreting agency objectives and services to local schools, civic organizations, and other community resources that serve these persons. The process includes:

- Acquainting the public with the objectives and services of the Independent Living Services Program of the North Carolina Division of Services for the Blind
- Locating all blind and visually impaired persons in need of, and who might be eligible for, services
- Informing these persons of the services available
- Determining whether these persons are interested in receiving services

In the process of identifying those in need of Independent Living Services, the Social Worker for the Blind will be guided by the following concepts:

- To believe that every blind and visually impaired person is entitled to know about available independent living services and to consider them according to his/her needs and interests

- To be realistic in providing for suitable services on the basis of a true understanding of the general objectives and services that the agency is equipped to provide
- To be aggressive and active to keep case finding channels open
- To demonstrate good public relations techniques. Such a process encourages community understanding and helps provide a better community climate for recognition of the problems of blindness and visual loss.

An expanded version of these concepts is found in Appendix E: Social Work Techniques. Each worker will become familiar with these concepts and incorporate them into the Case Management Process.

1. Sources of Cases

Consumers served by the Independent Living Services Program may come from a variety of sources such as self-referrals, doctors, hospitals, clinics, public and voluntary social services agencies, educational institutions, employers, the Social Security Administration, the Veterans' Administration and other concerned persons. **However, staff in state and county agencies are not authorized to use information from the Social Security Administration, such as SDX data, as a source of referrals for potential consumers. This principle applies to every person contacted by or served by the Division of Services for the Blind.**

2. Referrals for Services

A referral is defined as any person or his/her representative who has contacted a Division of Services for the Blind Social Worker for the Blind by personal contact, telephone or letter, or who has been referred to any North Carolina Division of Services for the Blind employee by letter, telephone, direct contact or other means, and for whom the following minimum information has been furnished or is being furnished during the in-take process:

- name, address, and/or telephone number, and
- visual impairment as perceived by the referral.

The Social Worker for the Blind **must** report these referrals in the electronic Services System in Status 00: Referral even though the worker may later need to close the referral because the person is found to be ineligible for services. Recognition of this basic process is essential for **all** Social Workers for the Blind. The worker is referred to ESS Manual for instructions on electronic data entries.

B. Step 2: Eligibility Documentation

This second step of the case process consists of three distinct levels: Consumer Study, Application Process and Eligibility Decision.

1. Consumer Study

During the consumer study, the Social Worker for the Blind has received a referral on a candidate for independent living services. The consumer study

includes collecting data that will assist the Social Worker for the Blind to determine the referral's eligibility for services. This data includes the eye examination report and other pertinent data such as economic, psychological, social and educational information.

All referrals must be contacted by the Social Worker for the Blind within 15 calendar days of receipt of referral. The worker will conduct an initial interview with the prospective consumer as soon as possible after referral has been made to the agency. The interview may take place in the office of the Social Worker for the Blind, another agency, hospital or home setting. During the initial interview, the principle source of information is the referral himself/herself. The Social Worker for the Blind introduces the individual to the agency's purpose, services, objectives and enables the referral to relate this information to his or her own situation.

During the initial interview the Social Worker for the Blind obtains a statement of the referral's problems, gives an explanation of the overall functions of the Independent Living Services Program, confirms the referral's desire for services, records and evaluates the pertinent facts and data obtained and begins an assessment to determine the referral's individual needs and level of functioning. When the initial interview is completed, the Social Worker for the Blind must make one of the following decisions:

- the referral is ineligible for services and remove his/her name from Status 00 (Referral) and enter his/her name in Status 08 (Rejected) in the Electronic Services System **or**;
- more information is needed before making a decision to accept or reject the prospective consumer of Independent Living Services and leave the referral in Status 00 (Referral) while obtaining the needed information **or**;
- the prospective consumer is eligible for Independent Living Services and assist him/her in making application through [DSB-7001](#): Application.

2. Application Process

a. Right to Apply for Services

Any person has the right to apply for independent living services. The Social Worker for the Blind is responsible for assisting the referral/applicant in making application through [DSB-7001](#): Application. In some county DSS systems, an employee other than the Social Worker for the Blind may be assigned this responsibility. The application form documents requests for independent living services available through the Division of Services for the Blind and includes information relevant to eligibility determination.

Eligibility criteria for independent living services are outlined in [Section 250](#) of this Manual. Instructions for completing [DSB-7001](#): Application are outlined in [Section 500](#): Reporting Requirements. The worker will also enter data electronically (see ESS Manual).

b. Confidentiality

All staff must respect the confidential nature of their positions and the special relationship that exists between them and all applicants and consumers. Access to all records is restricted to authorized staff of the agency and any cooperating agency when in the best interest of applicants and consumers (with written permission).

A social worker must respect the privacy of the consumers he or she serves. Only when an individual has confidence in the agency and his/her worker can positive relationships be established and valid service be rendered. All staff should be aware of [N.C. General Statute 111-28](#) relating to Confidentiality which states:

It is unlawful, except for purposes directly connected with the administration of aid to the blind and visually impaired and in accordance with the rules of the Department of Health and Human Services, for any person to solicit, disclose, receive, make use of, or to authorize, knowingly permit, participate in, or acquiesce in the use of, any list of or name of, or any information concerning, persons applying for or receiving aid to the blind and visually impaired, directly or indirectly derived from the records, papers, files, or communications of the Department of Health and Human Services, the board of county commissioners, or the county social services department, or acquired in the course of the performance of official duties.

(1) Release of Information Statement

If an applicant/consumer makes use of resources from service agencies other than the Division of Services for the Blind, the Social Worker for the Blind may determine that a sharing of information is appropriate in meeting the needs of the applicant/consumer. In such cases the worker must obtain a signed release of information statement or, if the information to be released includes health information, a [DHHS-1000](#) must be completed and signed by the applicant/consumer. A copy of all release of information statements and DHHS-1000s **must** be filed in the case record prior to the release of any information.

If the SWB is requesting health information such as an eye report from a medical provider, the DHHS-1000 must be completed and signed by the applicant/consumer and the original forwarded to the medical provider. A copy of the DHHS-1000 Authorization To Disclose Health Information is in [Section 500](#) Reporting Requirements, page F-15. The [DHHS Policy and Procedure Manual, Section VIII](#). Security and Privacy addresses the HIPAA Policy and this is located in Appendix J of this manual.

(2) Consumer Access to Case Records

If a consumer expresses interest in the contents of his/her case record, the SWB will provide information from the record in accordance with the Privacy Information Act. Because records may be subpoenaed by the courts, it is imperative that the worker record only such information as can be substantiated by knowledge and professional belief.

(3) Inappropriate Source of Information

As stated in an earlier section, staff in state and county agencies are not authorized to use information from the Social Security Administration, such as SDX data, as a referral source for potential consumers. This principle applies to every person contacted by or served by the Division of Services for the Blind.

c. Voter Registration Services

DSB is one of several agencies in North Carolina required to offer voter registration ([G.S. 163-82.20](#) effective January 1, 1995). We are required to offer all individuals the opportunity to register to vote or update their voter registration records each time an individual applies for services, during renewal or recertification of services, and/or when there is a change of address or name.

The agency DSB Voter Registration Policy is located in Appendix L of this manual. The link to the Voter Registration policy is <http://info.dhhs.state.nc.us/olm/manuals/dsb/VR/man/Voter%20Registration.htm>

3. Eligibility Decision

a. Time Frame for Decision

The eligibility decision must be made and the applicant notified of the agency's decision **within 30 calendar days after date of application**. This decision will be either for acceptance (Status 10: Active) or for rejection (Status 08: Rejected).

Status 10: Active - This status identifies all applicants accepted for independent living services. These persons will be reported in Status 10 in the Electronic Services System and on [DSB-7001](#): Application.

Status 08: Rejected - This status identifies all referrals/applicants not accepted for services. These persons will be reported in Status 08 in the Electronic Services System and on [DSB-7001](#): Application.

b. Eligibility Period for Services

Four of the five independent living services available through DSB have open-ended eligibility periods, meaning that the consumer remains eligible for any, or all, of them as long as eligibility criteria of *vision and service need* are met (refer to ILS Manual [Section 250](#) for a detailed outline of eligibility policies).

These four services are:

- Adjustment Services for the Blind and Visually Impaired
- Health Support Services
- Individual and Family Adjustment Services

- Information and Referral

The eligibility period for the remaining service, In-Home Aide Services: Level I - Home Management, is for a maximum of twelve months during which time the consumer's continuing eligibility is contingent upon policies outlined in ILS Manual [Section 250](#): Eligibility Criteria and in [Sections 440](#) and [445](#). **However, a re-determination of eligibility must be made before the end of the twelve month period if the Social Worker for the Blind learns of change(s) in the consumer's legally blind status, service need, and/or his/her income.** All information must be obtained, assessed and the updated eligibility decision reached prior to the termination of the established period of eligibility. See [Section 440](#), page 64 for detailed instructions in determining eligibility for In-Home Level I.

C. STEP 3: SERVICE PLANNING

1. Assessment and Planning

After the applicant is determined eligible for independent living services, the Social Worker for the Blind will work with him/her to develop a written assessment and plan for service delivery using [DSB-7103](#): ILS Assessment and Plan. See form and instructions in [Section 500](#). For persons who will be receiving In-Home Aide Services: Level I - Home Management, the needs assessment **must** be conducted in the residence maintained by or for the applicant.

The Assessment and Plan must be completed in a timely manner so that service delivery is begun within 15 calendar days after the applicant is given or mailed his/her eligibility notice (copy of [DSB-7001: Application](#)). ILS program policy requires that SWBs include Adjustment Services for the Blind and Visually Impaired (code 360) in the Service Plan of every consumer receiving independent living services. Other services may be included depending on the consumer's needs. Each service available through the Independent Living Services Program is outlined in ILS Manual, [sections 400 - 445](#). These sections provide complete service definitions and elements of service provision. A thorough knowledge of these materials is

2. Specialized Services Available to Consumers

During service planning or later during service implementation, the SWB and/or the consumer may determine that the consumer needs different or more specialized services than those basic skills that he/she normally provides. If so, the worker will refer the consumer to a Resource Specialist for these services and/or skills development that require intensive consumer-teacher skills training over an extended period of time.

These Resource Specialists and their responsibilities 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 NECCs do not provide low vision aid evaluations to children in school as this is the responsibility of the school system (GMS Outreach is also a resource. However, Head Start screenings are still provided.
- Independent Living Rehabilitation Counselors provide **extensive** services in teaching the demands of daily living to consumers of all ages.
- Vocational Rehabilitation Counselors provide services relating to vocational/employment goals of consumer.

Assignment of Case Manager Responsibility: Within the Division of Services for the Blind, the designation of Case Manager is program specific, meaning that DSB consumers may have one, two, or three Case Managers at any given time, depending upon their service needs.

3. When Is It Appropriate to Refer Consumers for Specialized Services?

If the Social Worker for the Blind and/or the consumer agree that the consumer needs different or more specialized services than those basic skills normally provided by the SWB, the worker will refer the consumer to one or more of the following Resource Specialists to provide these additional services.

a. Referral to Orientation and Mobility Specialist in the Independent Living Services Program:

This referral is appropriate for consumers who need extensive training in safe travel skills such as sighted guide, cane techniques, and electronic travel aids (ETA's) for independent travel. If a consumer is accepted for O&M services, his/her case remains in Active status for services through the ILS Program and the SWB retains Case Manager responsibility.

b. Referral to Nursing Eye Care Consultant (NECC) in the Medical Eye Care Program:

This referral is appropriate for consumers who have special vision needs and who might benefit from adaptive optical aids and equipment. Case remains in Active status for services through the ILS Program and the SWB retains Case Manager responsibility.

c. Referral to Independent Living Rehabilitation Counselor In the Independent Living Rehabilitation Program:

While working with a consumer, the Social Worker for the Blind may determine that he/she needs skills training at a more complex level than provided through the

Independent Living Services Program. When both SWB and consumer acknowledge this additional need, the worker will refer the consumer to the Independent Living Rehabilitation Counselor. This referral is appropriate for consumers who need extensive skills training in meeting the demands of daily living. With this type of training, the counselor provides intensive skills training to consumers over an extended time period. If the consumer is accepted for ILR services, the ILR Counselor becomes his/her Case Manager for ILR services. If the consumer continues to be an active ILS consumer during this time, the SWB will continue to be his/her Case Manager for Independent Living Services. However, if the consumer has met his/her ILS Service Plan objective, the SWB will close the ILS case in Status 49: Successful.

d. Referral to Vocational Rehabilitation Counselor in the Rehabilitation Services Program:

While working with a consumer, the Social Worker for the Blind may determine that he/she needs employment/vocational services. After agreement between SWB and consumer, the worker will refer him/her to the Vocational Rehabilitation Counselor in the DSB rehabilitation Services Program. ILS consumers age 14 and over are to be evaluated by the Social Worker for the Blind for possible referral and transition to the Rehabilitation Services Program. Referral is appropriate for consumers age 14 and over who need assistance with meeting employment/vocational goals. The assistance may be needed in obtaining transitional services, initial employment, for retaining a current position or for returning to the workplace. If the consumer is accepted for rehabilitation services, the Vocational Rehabilitation Counselor becomes his Case Manager for rehabilitation services. If at the same time the consumer continues to be an active ILS consumer, the SWB will continue to be his Case Manager for Independent Living Services. However, if the consumer has met the objectives of his ILS Service Plan, the SWB will close his ILS case in Status 49: Successful.

4. How to Make Referral to Orientation and Mobility Specialists, Nursing Eye Care Consultants, ILR Counselors and VR Counselors

The Social Worker for the Blind will make referrals to Resource Specialists by forwarding to them **all** of the following required documentation:

a. 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**

b. Documentation of Service Need:

Documentation consists of a copy of the completed and signed [DSB-7103](#): Independent Living Services Assessment and Plan; **and**

c. 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. Additionally, Social Workers for the Blind will document the referral on the consumer's [DSB-7103](#): Independent Living Services Assessment and Plan in the case record.

5. Procedures for Referring Children for Specialized Education Services

For information regarding current procedures for referring children to Governor Morehead Preschool or Governor Morehead School, contact the Director of the Governor Morehead School at (919) 733-6381.

6. Conferences to Resolve Complaints

When an applicant/recipient of Independent Living Services brings a complaint to a Social Worker for the Blind and the worker is unable to resolve the complaint to the applicant's/recipient's satisfaction, the applicant/recipient is entitled to submit an Application for Conference (DSB-7219) to the Area Supervisor of Social Services for the Blind. See Section 500: Reporting Requirements for form and instructions.

a. The Area Supervisor of Social Services of DSB will schedule the location, date and time for the conference and notify appropriate staff from the Division of Services for the Blind and Division of Social Services. **The conference will be held within 30 calendar days from the date the request for the conference is received in the District Office.** The Area Supervisor will inform the applicant/recipient of his/her rights at the conference and will assist in finalizing the conference.

b. Area Supervisor of Social Services of DSB will prepare a written summary of the conference and will send the original to the applicant/recipient **within fifteen calendar days from the date the conference was held and will send a copy to the Division Director.** The summary will state the action necessary to resolve

the issue that raised the request for a conference, such as: "Policy incorrectly applied and recommended necessary correction."

c. If the applicant/recipient is satisfied with the interpretation of the policy, a signed statement must be secured from him/her stating satisfaction and that no further hearing is desired. The signed statement will be filed in a designated applicant file or the consumer's case record.

d. When the conference summary is sent to the Applicant/recipient, he/she must also be notified in writing of the right to appeal the agency's decision and must be advised of the procedure to follow. In the same written notice, the Applicant/recipient is instructed that he/she has **sixty calendar days** from the date he/she receives the Agency notice to request a Fair Hearing through the Office of Administrative Hearings (OAH).

e. Any petition for a contested case must be initiated by the Applicant/recipient to the Office of Administrative Hearings at the address below:

Office of Administrative Hearings
Capeheart-Crocker House
424 North Blount Street
Raleigh, North Carolina 27601-2817

7. Reporting Requirements

The Social Worker for the Blind is referred to ILS Manual [Section 500](#): Reporting Requirements which identifies all reporting forms and provides instructions for each form required in the Independent Living Services Program. Also, the worker is referred to the Electronic Services System (ESS) Manual for electronic data requirements. It should be noted however that even if the SWB does all forms, narrative, etc. electronically, there must still be a paper copy of all work done in the consumer's record. This is necessary to allow Reviewers to access the entire record easily.

D. STEP 4: SERVICE DELIVERY

At this stage of the case process, the Social Worker for the Blind initiates goal-oriented service delivery based on the following criteria:

- Individualized services will be provided that will significantly increase the consumer's capacities and abilities to be independent and self-sufficient.
- The consumer will be taught skills and provided individualized services that will lead to a higher level of independence and self-sufficiency.

- The Social Worker for the Blind will provide services to consumers and/or will refer them to a Resource Specialist if they require services requiring specialized knowledge and skills.

The Social Worker for the Blind will document all consumer contacts and service delivery in the consumer's case record by way of case recording. Refer to ILS Manual Section 320: Case Records and Case Recording for program requirements for case recording.

TIME FRAMES FOR SERVICE DELIVERY: All services requested and approved at the time of application must be provided within 15 calendar days after the date notice of eligibility (copy of DSB-7001: Application) is given to, or mailed to, the consumer. If a consumer applies for one or more additional services and is determined eligible, the service(s) must be provided within 30 calendar days of the application date for the additional service(s)

E. STEP 5: CASE CLOSURE

1. Successful Closure (Status 49)

a. For cases in which ILS services were provided only by the Social Worker for the Blind:

The case is ready for successful closure (Status 49) after services have been provided and both Social Worker for the Blind and the consumer agree that the consumer has achieved his/her goal as listed on his/her Service Plan (DSB-7103). The SWB will provide the consumer with a 10-day advance notice of case closure.

b. For cases in which ILS services were provided by the Social Worker for the Blind and/or the Orientation and Mobility Specialist and/or Nursing Eye Care Consultant:

Before closing the consumer's case in Status 49, the SWB must contact the Specialists noted above who are providing, or have provided, specialized services to the consumer and confirm with them that the consumer has completed all skills training listed on his/her respective Service Plan. The SWB will provide the consumer with a 10-day advance notice of case closure.

c. For cases in which ILS services were provided by the SWB and/or the Orientation and Mobility Specialist and Nursing Eye Care Consultant:

Before closing the consumer's case in Status 48, the SWB must contact the Specialists noted above who are providing, or have provided, specialized services to the consumer to determine whether the consumer has completed all skills training listed on his/her respective Service Plan. The SWB will provide the consumer with a 10-day advance notice of case closure.