Orientation & Mobility Procedure Manual

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Orientation & Mobility Procedures Manual

The Orientation and Mobility (O&M) program establishes and implements standards for the prompt and equitable processing of referrals of individuals who could benefit from O&M services. The standards include timelines for making good faith efforts to inform these individuals of the information that needs to be gathered to determine eligibility for services.

Customer Priority

Orientation & Mobility (O&M) Specialists serve all customers within their assigned territory. Customers who need Orientation and Mobility (O&M) service are prioritized as follows:

A. Employment bound Customer is in Service status on a Vocational Rehabilitation (VR) caseload. This includes transition age consumers who are open to VR but not in an employment status.

B. Non vocational - Customer is in Service status on a Rehabilitation Teaching /Independent Living (RT/IL) caseload.

Using the AWARE Integrated Case Management System

O&M specialists will utilize the AWARE Integrated Case Management System to find information about a customer as well as to input information. The AWARE System comprises a Referral Module, a Participant Module and a Service Module.

1. Referral Module:

   The Referral Module is maintained by the intake worker and generates the customer's personal information as well as eye report information. It is not accessible to the O&M specialist.

2. Participant Module:

   The Participant Module contains the customer's personal information as well as Case Notes and a rehabilitation plan from the VR counselor, Rehabilitation Teacher and Education Coordinator if appropriate.

3. Service Module:

   The Service Module is used by the O&M Specialist. In this module, the O&M Specialist is the case manager and documents all activities with customers using Service Notes and selecting the type of note by using the options in the drop down box.

Case Statuses

The AWARE status system uses descriptive words that indicate where the case is in the process and the primary service that is being rendered. Orientation & Mobility (O&M) has 4 case statuses:

A. New

B. Pre-Admit

C. Admitted

D. Completed

A. NEW status (Referral for O&M Services)

1. Definition

NEW, is the status for customers who are initially referred to an O&M specialist's caseload.

2. Process for referring customers to O&M services

a. The VR, RT or ES case manager completes a Service Authorization for O&M Services in the AWARE Participant Module. Upon completion, the customer will appear on the O&M caseload in NEW status. The VR, RT or ES case manager notifies the O&M specialist of the referral via an email message that includes at a minimum:

i) The customer's name and

ii) Specific reason(s) for the referral.

3. Process for moving New referral into Pre-Admit status

a. Go to your caseload list.

b. Select a New customer which brings you to the Selected Layout entitled Service Summary which is the default layout in AWARE. If not on this layout, select it from the drop down menu and click Apply.

c. Click on Service Authorization.

d. Go to Case Manager and assign yourself from the drop down menu. This puts the Service Authorization in Pre-Admit status. (Note: If you fill out the Authorization Approved Date on this page, then the case will be placed in Admitted status, so don't do this until after the initial visit.)

e. Click on Finish. This will bring you back to the Service Summary page and change the status from New to Pre-Admit.

f. Click on Service Item.

g. Go to Service Group and select O&M Service Provider from the drop-down menu.

h. Go to Responsible Provider and select yourself from the drop down menu. This puts the Service Item in Pre-Admit status. (Note: The Item Begin Date cannot be entered until the authorization is opened and the case is in Admitted status.)

i. Click on Finish. This will bring you back to the Service Summary page and change the status from New to Pre-Admit.

j. Next, the initial interview takes place and the person is either closed/Completed or opened/Admitted.

B. PRE-ADMIT status

1. Definition

A customer's status changes to PRE-ADMIT status when an O&M Specialist has been assigned.

2. Summary of Timelines that need to be met between the Pre-Admit status to Admitted status

a. Within 15 workdays of receiving the NEW referral the O&M specialist must make the **<u>initial contact</u>** with the customer.

b. Within 30 workdays of receiving the NEW referral the O&M Specialist must make the **<u>initial visit to and assessment</u>** of the customer

c. Within 20 workdays of making the initial visit to the customer the O&M Specialist must either **<u>determine if the customer is eligible</u>** for O&M services and write the "Initial Assessment Service Note" which outlines the planned O&M program OR determine that the customer is ineligible and close the case.

3. Customers remain in PRE-ADMIT status until the O&M specialist

a. visits the customer,

b. completes an O&M Evaluation and writes the O&M-Initial Assessment Service Note in the customer's AWARE case,

c. determines if O&M services are appropriate or not appropriate and

d. moves the case to Admitted status or Completed status by closing the customer with the appropriate reason.

4. O&M – Initial Assessment Service Note Requirements

a. An <u>O&M - Initial Assessment Service Note</u> must be written to both summarize the results of the initial O&M Evaluation and to outline the O&M program that is planned. See Service Note. <u>A. O&M - Initial Assessment Service Note.</u>

5. Status Movement: Customers can move from Pre-Admit to:

a. Admitted.

b. Completed and closed for the appropriate reason.

6. Process of moving from Pre-Admit to Admitted status

a. Go to your caseload list.

b. Select a Pre-Admit customer which brings you to the Selected Layout entitled Service Summary which is the default layout in AWARE. If not on this layout, select it from the drop down box and click on Apply.

c. Click on Service Authorization.

d. Go to bottom of the screen and under Authorization Approved Date enter the date. (Note: For all date fields, there are several options to enter the date: press "t" to enter today's date; or, click on the small calendar and choose date; or, type in date; press "+" or "-" to change the day up or down.)

e. Click on Finish. This will bring you back to the Service Summary page and change the status of the Service Authorization from Pre-Admit to Admitted.

f. Click on Service Item.

g. Go to bottom of the screen and under Item Begin Date enter the date. (Note: For all date fields, there are several options to enter the date: press "t" to enter today's date; or, click on the small calendar and choose date; or, type in date; press "+" or "-" to change the day up or down.)

h. Click on Finish. This will bring you back to the Service Summary page and change the status of the Service Item from Pre-Admit to Admitted.

B. ADMITTED status

1. Definition

Customers who are accepted for O&M training are placed in Admitted status. The case moves to Admitted status when the participant's Authorization Approved Date and Service Item Begin Date are entered on their respective pages in AWARE.

2. Service Note Requirements

a. An O&M Training Service Note must be completed after each contact with the customer (e.g., lesson, email exchange, telephone call, etc.).

b. See Service Notes: B. O&M - Training Service Note.

3. Status Movement

Customers can move from Admitted to Completed – *with appropriate reason.*

4. Process of moving from Admitted to Completed status

a. Go to your caseload list.

b. Select an Admitted customer which brings you to the Selected Layout entitled Service Summary which is the default layout in AWARE. If not on this layout, select it from the drop down box and click on Apply.

c. Click on Service Item.

d. Go to bottom of the screen and under Item End Date enter the date. (Note: For all date fields, there are several options to enter the date: press "t" to enter today's date; or, click on the small calendar and choose date; or, type in date; press "+" or "-" to change the day up or down.)

e. Click on the Item Outcome dropdown box and select Completed or the appropriate explanation for closure.

f. Click on Finish. This will bring you back to the Service Summary page and change the status of the Service Item from Admitted to Completed.

g. Click on Service Authorization.

h. Go to bottom of the screen and under Authorization Complete Date enter the date. (Note: For all date fields, there are several options to enter the date: press "t" to enter today's date; or, click on the small calendar and choose date; or, type in date; press "+" or "-" to change the day up or down.)

i. Click on the Authorization Outcome dropdown box and select Completed or the appropriate explanation for closure.

j. Click on Finish. This will bring you back to the Service Summary page and change the status of the Service Authorization from Admitted to Completed.

B. COMPLETED status

1. Definition

Whether customers have completed or stopped their O&M training program, their Service Authorization and Service Item must be closed as Completed.

2. Possible Explanations for Moving to Completed status

a. (Not Completed)

b. Completed

c. Declined Further Service

d. Graduated

e. Medical Reasons

f. No Show

g. Other – Explain *(If Services are Not Indicated – SNI – explain that here.)*

h. Refused Services

i. Services No Longer Needed

j. Transferred to Other Services – Explain

k. Transferred to Other Services Provider

l. Unsatisfactory Progress Disciplinary

3. O&M-Completed Service Note Requirements

a. An O&M - Closure Service Note must be written to explain why a customer is being closed. See Service Notes: C: O&M - Closure Service Note.

4. Status Movement:

a. Customers cannot be moved into any other status from Completed status.

Courtesy Orientation Services

Courtesy Orientation customers are tracked in the AWARE Referral Module if they have never been open to DBVI or in the customer's Participant Module if they had been open to DBVI in the past.

A. Definition

A customer is provided Courtesy Orientation services, whenever they meet the following four criteria:

1. The customer is not currently open to DBVI; and
2. The total time needed for the Courtesy Orientation will not require more than eight hours of an O&M specialist's time. The orientation should be completed within a one month period (if customers need orientation to the public transportation the time requirement is extended to no more than 16 hours within a two month period).
3. The customer has already been trained in O&M methods and techniques by a qualified O&M specialist.
4. The Courtesy Orientation referral must be approved by and come through the O&M specialist's Regional Manager to the Intake Worker.

B. Clarifying Notes

1. Courtesy Orientation is for short term orientation only; it is not to be used as a substitute for an orientation and mobility program or a refresher course.
2. If a customer is currently open to DBVI and being served by VR or RT, then Courtesy Orientation **cannot** be used. Rather, the case manager must refer the customer to the O&M program.
3. The customer does not need to complete any DBVI paperwork to receive Courtesy Orientation; ie, they do not need to sign an application, secure an eye report, or provide any of the other documents that are normally required to be open to DBVI.

C. Process

1. **Customer was never served by DBVI**, so a customer file does not exist. For example – the customer is coming to work in Virginia from another state.
    a. The Intake Worker codes the Courtesy Referral as "courtesy" in the AWARE Referral Module.
    b. The RM must approve the courtesy referral and assign the case to the appropriate O&M specialist. This is communicated to the O&M Specialist by an email.
    c. The Intake Worker writes an intake note explaining that this is a Courtesy Case that has been approved by the Regional Manager and stores them in the AWARE Referral Module.
    d. The O&M Specialist writes Service Notes as appropriate and sends them to the Intake Worker who copies and pastes them into a Referral Module note.

e. Since O&M staff do not have direct access to the Referral Module notes, they must work with the Intake Worker or Regional Manager to view the notes.

2. **Customer has received services from DBVI at some time in the past**, but is currently closed to the agency, so the customer has a case file in the AWARE Participant Module.

   a. The RM must approve the courtesy referral and assign the case to the appropriate O&M specialist. This is communicated to the O&M Specialist by an email.

   b. Courtesy Orientation can be documented in the customer's AWARE Participant Module's Case Notes.

      i) Since the customer is closed to the agency, access to the closed file can be obtained by writing the name into the Participant Module and accessing the file through the most recent closure date.

      ii) Once accessed, the O&M Specialist can enter "Courtesy Orientation" as a new Case Note and document the orientation that has occurred.

D. Service Note Requirements

1. An O&M Closure Narrative must be written after services have been provided.

   a. For customers who have never been served by DBVI, the report is kept in the customer's Referral Module file.

   b. For customers who have an AWARE case file, the O&M Specialist can enter the new Courtesy Orientation Case Note in the VR or RT Participant Module.

2. The O&M Closure Narrative must include:

   a. the name of the person who received Courtesy Orientation Services

   b. the date on which the request was made

   c. the specific orientation lesson(s) that were provided

   d. the outcome of the lesson(s)

   e. the number of days and the number of hours spent with the customer.

3. If the request for Courtesy Orientation comes from another regional office, copies of all Case Notes are sent to the referring source.

E. Service Note Requirements

If, the customer has never been served by DBVI and if during the course of providing courtesy orientation, the specialist and customer feel that a more extensive program is needed, the customer must be closed to Courtesy Orientation in the Referral Module and referred to the appropriate Vocational Rehabilitation counselor or Rehabilitation Teacher in order to be opened by that program so that the customer can receive a full O&M program.

Customers Requiring an Interpreter

The cost of hiring an interpreter must be authorized by the VR, RT or ES case manager; the cost will be charged to the referral sources funding stream. The O&M specialist is responsible for securing the services of an interpreter. Some offices have a list of interpreters that they contact directly. If interpreters are not readily available, contact the Department for the Deaf and Hard of Hearing - http://www.vddhh.org/IpAbout.htm

O&M Initial Assessment

With the exception of Courtesy Orientation customers, all other O&M customers must receive an O&M Initial Assessment that assesses their visual functioning, sensory functioning, motor skills, travel skills and perceived needs as appropriate.

A. Components of the Initial O&M Assessment

See Appendix A for an example of an Orientation and Mobility Skills Checklist

Following is a list of items that could be in any O&M assessment as appropriate for the customer's situation and age.

1. VISUAL ABILITY – examples: diagnosis of visual impairment; acuity; color identification; contrast sensitivity; depth perception; field of vision; functional travel vision; visual functioning at distance, intermediate and near point; glare; identification of shapes; illumination preferred; light perception; object identification; object perception; optical aids used; reading medium(s) preferred; scanning; tracking; use of vision.
2. AUDITORY ABILITIES – examples: attention to and identification of environmental sounds, localization, tracking sound, echolocation, object perception,
3. TACTILE ABILITIES – examples: neuropathy, identify tactile landmarks, discriminate between textures, discriminate between surfaces.
4. SPATIAL ABILITIES – examples: balance; body image; coordination; directionality; gait-posture; laterality; physical concepts; spatial relationships
5. TRAVEL SKILLS – examples: confidence/quality of movement; following directions; formal O&M techniques; indoor travel skills; organization of environment; outdoor travel skills; safety; and street crossing.

B. Report of Functional Vision Assessment

1. See Appendix B

Low Vision

A. O&M specialists may provide O&M related Low Vision services for O&M customer.

B. It is especially important for O&M specialists to evaluate a customer’s functional vision as well as his/her need for sun wear.

C. Subsequent to low vision examinations, O&M specialists are expected to provide follow up training with LV aids that are appropriate for orientation and mobility.

D. Refer to the DBVI Low Vision Policy and Procedure Manual for specific information and procedure.

E. See Report of Functional Vision - Assessment

Service Notes

A. **O&M - Initial Assessment** Service Note (AF OM 02 (02/11/2011))

After a customer has been assessed, the O&M specialist must write an O&M - Initial Assessment Service Note that includes:

1. Date(s) of Assessment:
2. Summary of Assessment and the results highlighting a customer's strengths and needs.
   a. Visual Ability
   b. Auditory Abilities
   c. Tactile Abilities
   d. Spatial Abilities
   e. Travel Skills
3. Outline of the O&M Program that is planned; this should be based on the results of the assessment.
4. Additional Comments:

B. O&M - Training Service Note (AF OM 04 (09/28/2011))

One of the more positive features of the new AWARE integrated caseload management system is the ability to enter Service Notes directly into customers' electronic file. Since O&M specialists are able to directly enter Service Notes, DBVI can track the services we provide. New case file documentation provides DBVI staff with chronological records of what has transpired while being served by the agency. Service Notes identify the services provided, skills being taught, successful acquisition of new skills, and difficulties encountered which may require additional work or consideration of alternate approaches. (See GENERAL MEMORANDUM; DS-GM-08-11 (December 4, 2008) (http://intranet/DVH/memos/downloads/NewDocumentationRequirements08.doc). Note that all Case Notes and Service Notes can be accessed through the Service Module so that customer background information can be obtained.

1. Process
   a. The O&M specialist enters Service Notes into AWARE documenting each direct contact or lesson they have with individuals receiving services, including face-to-face meetings and significant phone and e-mail communication.
   b. Enter Service Notes into AWARE within five work days of the contact with the individual receiving services. Best practice is to enter Service Notes the same day that the contact or lesson has occurred.
   c. Provide documentation in the Service Notes section of AWARE when there has been no contact or lesson with the individual who is receiving services for periods exceeding three months. This documentation will provide justification for the lack of contact with the individual.
2. An O&M - Training Service Note is written after every training session
   a. Date of Lesson

b. Description of instruction activities that took place this session.
c. Progress during the lesson.
d. Concerns and problems encountered during the lesson
e. Instruction planned for the next lesson:
f. Additional Comments

C. **O&M - Closure** Service Note (AF OM 01 (09/28/2011))

When training has been completed, the O&M specialist will develop an O&M - Closure Service Note that includes:

1. Date of Closure
2. Concerns, if any, that remain at the end of training
3. Level of safe and independent travel
4. Recommendations for future training
5. Reason for closure
6. Statement that the participant is aware of the closure, knows why they are being closed and knows that they can contact the agency again if needed
7. Additional comments

D. Additional Categories of Service Notes

Use the category which most accurately describes what is being reported. For example:

1. Face to Face (when you see the customer but we don’t train for whatever reason)
2. Interrupted Services
3. Meeting
4. Narrative
5. Phone Call
6. Pre-Admission
7. Staffing
8. Cancellation
9. Email
10. Closure
11. Consultation
12. Correspondence
13. Courtesy Orientation Training
14. O&M – Cane
15. O&M – Other
16. On-Site Visit
17. Referral
18. Safety Concerns
19. Specail Notes
20. Unable toContact

O&M Canes

A. Recording Canes on a Customer's Plan and in Service Notes

1. When O&M specialists provide new or replacement O&M canes to customers, three actions occur:
   a. The cane is added to the O&M Tracking Form – see section "C. Tracking Form and Cane Reordering Process" below.
   b. An O&M-Cane Service Note is developed in the customer's service file to record specific information about the cane – see section B.1.f Example of an "O&M – Cane Service Note" below.
   c. The cane specific information is entered into the customer's Case Plan in the Participant Module. The process for entering the cane specific information differs by case type:
      i) FOR VR CASES – the O&M specialist emails the VR Counselor – Cane Service Note which has the cane specific information to the Case Manager so that the Case Manager can enter the information into the VR plan where appropriate.
      ii) FOR RT/OBG CASES – the O&M specialist must first request "guest access" from the Rehabilitation Teacher and then enter the cane information into the customer's RT/OBG plan.

B. O&M Cane Specific Information needed for both the O&M-Cane Service Note and the Customer's VR or RT/OBG Plan

1. Specific Information about the cane that needs to be recorded on the plan
   a. Service Categories for the type of cane provided:
      i) "Folding Cane" - S10000
      ii) "Rigid Cane" - S10001
      iii) "Support Cane" - S10002
      iv) "Replacement Cane Tips" (All Other Travel Aids) - S10003
   b. Description of the cane
      i) Make of Cane (ex. - AmbuTech, NFB, White Cane, etc.)
      ii) Category of Cane – Straight, folding, support
      iii) Length of cane – length of cane or "adjustable" for certain support canes.
      iv) Type of Cane – Aluminum, Fiberglass or Carbon Fiber
   c. Type of Cane Tip
   d. Estimated Cost of Cane
      i) "Folding *Cane" = $20.00*
      ii) "Rigid Cane"
         (a) Aluminum= $16.50
         (b) Fiberglass = $30.00
         (c) *Carbon F*iber = $40.00
      iii) "Support Cane" = $20.00
   e. Estimated cost for related Cane items
      i) Replacement Tips = $6.25

ii) Wrist Straps for Support Canes = $3.00

f. Example of an "O&M – Cane Service Note":

Make of Cane – AmbuTech Length of Cane – 54" Type of Cane – Aluminum Structure of Cane – Folding Type of Tip – Roller Ball Service Category - S10000 Cost of Cane - $20.00

C. O&M Tracking Form and Cane Reordering Process

Each regional office will track the canes they provide to their customers by using the "O&M Cane Supply Tracking Chart."

1. Using the "O&M Cane Supply Tracking Chart"

   a. Each regional office has a "base" supply of canes and cane supplies. As canes or cane supplies are dispensed, indicate that they were removed from stock on the "O&M Cane Supply Tracking Chart" by placing a "/" in the column to the right of the item under the appropriate program.

2. Instructions For Completing The O&M Cane Supply Tracking Chart:

   a. As canes and cane supplies are provided to customers, indicate that one was removed from stock by placing a "/" in the column to the right of the item under the appropriate program. The regional office should use this information to help them reorder the number of canes that were dispensed.

3. Example Of Tracking Chart:

ITEM	ES (cc: 303)	RT (cc: 304)	VR (cc: 474)	Older Bld (cc: 305)
Straight Canes	/	//	///// ///// ///// /	///
Support Canes; adjustable		//		//
TOTAL	1	4	16	5

In this example 22 straight canes were dispensed: 1 to ES customers, 2 to RT customers, 16 to VR customers, and 3 to Older Blind customers. 4 support canes were distributed: 2 to RT customers and 2 to Older Blind customers. Therefore, the cost will be split as follows: 4% to the ES cost code, 15% to the RT cost code, 62% to the VR cost code, and 19% to Older Blind cost code.

D. Ordering Canes & Cane Supplies

1. Canes will be ordered three times per year - March 31, July 31, and November 31. Using the tracking chart, each regional office should order the number of canes and supplies that were dispensed since the previous order; this will bring their cane stock back to the original base level.

2. By the specified dates, each regional office will send an e-mail to the O&M program director with an order specifying the make, model, size, description, price and quantity of the canes and cane supplies needed to replenish their stock. Include the cost code distribution for each group of items. The DBVI purchasing agent will use this information to determine the number of items to order, the cost distribution between cost codes, and where to order them based on price.

3. Ordering Single Specialty Canes for Specific Customers

Single order, specialty canes may continue to be purchased for specific customers. These canes are treated as individual orders and ordered through the appropriate regional office rehabilitation teacher or the vocational rehabilitation counselor using AWARE routine regional office purchasing procedures.

a. All orders must adhere to the Commonwealth’s purchasing procedures.

b. Cost Code To Be Used for Distribution:

    RT: Cost Code 304
    VR: Cost Code 474
    OBG: Cost Code 305

5. See Appendix C for O&M Cane Procurement Request
6. Sample Order

PRODUCT CODE	SUPPLY/ITEM DESCRIPTION (Color, size, Catalog No., UPC Code)	QTY	UNIT OF MEASURE	UNIT COST	TOTAL COST	OBJECT CODE
CG3050R-46-4	Aluminum Folding Mobility Cane, White/Red tape; 4 sections; straight handle; Slip-on Pencil Tip,	3	46”	18.00	54	1309
CG3050R-52-4	Aluminum Folding Mobility Cane, White/Red tape; 4 sections; straight handle; Slip-on Pencil Tip,	2	52”	18.00	36	1309
CG3050R-54-4	Aluminum Folding Mobility Cane, White/Red tape; 4 sections; straight handle; Slip-on Pencil Tip,	7	54”	18.00	126	1309
CG3050R-56-5	Aluminum Folding Mobility Cane, White/Red tape; 5 sections; straight handle; Slip-on Pencil Tip,	9	56”	18.00	162	1309
CG3050R-58-5	Aluminum Folding Mobility Cane, White/Red tape; 5 sections; straight handle; Slip-on Pencil Tip,	1	58”	18.00	18	1309
MT4090/MP26	Hook style Roller Tip; white			6.50	104	1309
MT3090	Slip-on style Roller Tip; white	16		6.50	0	1309
MT3060	Slip-on Rolling Ball Tip; white			5.50	0	1309
CM2020-R	Support Cane Modern; Red/White; extra length;	4	33”-41’	21.75	87	1309
	TOTAL				587.00	

THIS SECTION MUST BE COMPLETED

AGENCY	COST CODE	PROGRAM	PROJECT	TASK	PHASE	FUND	PERCENT
702	303 (ES)	019102	00000	00		0100	4%
702	304 (RT)	045407	00000	00		0280	15%
702	474 (VR)	045404	44006	00		1000	62%
702	305 (Old Bld)	045407	50406	00		1000	19%

7. O&M Vendors for Canes and Cane Accessories
   (NOTE: cane tips are not interchangeable between different brands of canes)

   a. Ambutech; 34 DeBaets Street; Winnipeg, Canada R2J 3S9; Tel: 1.800.561.3340; Fax: 1.800.267.5059
   b. Independent Living Aids (ILA); 200 Robbins Lane; Jericho, NY 11753; 800.537.2118; can-do@independentliving.com
   c. LS& S (Learning sight & sound made easier), 145 River Rock Drive, Buffalo, NY 14207. Tel: 800.468.4789. www.LSSproducts.com
   d. Maxi-Aids, Inc.; 42 Executive Blvd.; Farmingdale, NY 11735; Tel: 1.800.522.6294; Fax: 1.631.752.0689; www.MaxiAids.com
   e. Revolution/Advantage (carbon fiber canes) - small business; 12170 Dearborn Place; Poway, CA 92064; 800.382.5132; www.advantagecanes.com (typo corrected)
   f. California Canes (carbon fiber canes) - small, minority; 16263 Walnut St.; Hesperia, CA 92345; 866.332.4883 .website: www.californiacanes.com

      Website not working right now (4/10/12)
   g. National Federation of the Blind; 1800 Johnson St.; Baltimore, MD 21230; 410.659.9314; materials@nfb.org
   h. White Cane Instruments for the Blind; Rt. 3 Box 89-A; Jenkins, MO 65605; Tel: 417.574.6368
   i. REFLECTING TAPE; 3M Company; 3M Center; St. Paul, Minn. 55101
   j. LS&S; Services for the Visually Impaired; 8720 Georgia Ave.; Suite 210; Silver Spring, MD 20910; 301.589.7281

APPENDIX

A. O&M Permission Form

1. O&M Permission Form

O&M Permission Form in AWARE. For school age students, the O&M specialist must have the parent/legal guardian's permission to provide O&M services to their child prior to O&M evaluations and instruction. The original copy of the form is filed in the O&M section of the child's DBVI central paper file and copies are mailed to the parent and school division.

a. Name of Child
b. School Division
c. Orientation & Mobility Specialist
d. O&M Specialist Phone

2. O&M Permission Form Instructions

B. Example of O&M Skills Checklist

Basic Skills

______Basic Sighted Guide Technique
______Switching Sides
______Narrow Passageways And Congested Areas
______Negotiation Of Doors
______Ascending Stairs
______Descending Stairs
______Seating (Various Types)
______Social Graces (Doors, Seating, Shaking Hands)
______Use Of Water Fountain
______Car Familiarization
______Can Explain Techniques To Others
______Adapts To Various Guides
______Enters And Exits Public Transportation Effectively With Guide Trailing
______Upper Hand And Forearm Protective-Technique
______Lower Hand And Forearm Protective Technique
______Bending Over
______Technique For Elevators
______Technique For Escalators
______Techniques For Revolving Doors
______Hines Break
______Direction Taking
______Squaring Off
______Location Of Dropped Objects

Cane Skills

______Knowledge Of The White Cane Laws
______Identification Of Parts Of The Cane And Its Uses Maintenance And Storage Of The Cane
______Diagonal Technique
______Modification With Sighted Guide
______Alternate Technique With Guide
______Transfer Sides Relative To The Guide While Carrying A Cane
______Turning With A Cane
______Touch Technique
______Transfer From Diagonal To Touch Technique
______Simple Shorelining
______Touch And Drag
______Touch And Slide
______3 Point Touch
______Location Of-Door Handle
______Entering And Exiting From Doors
______Ascending Stairs With And Without Hand Rails

______Descending Stairs With And Without Hand Rails
______Location Of Dropped Objects
______Hines Break With Cane
______Switches Cane Hand Effectively When Necessary

Indoor Skills

______Cardinal Directions
______Directional Turns (45 Degrees, 90 Degrees, 180 Degrees, and 360 Degrees)
______Landmarks
______Location Of Intersecting Hallways, Open Doors, Recession, End Of
______Hallway, Etc., By Auditory Clues
______Parallel And Perpendicular
______Normal Body And Hand Positioning

Information Necessary For Orientation While Outdoors

______Define A Block
______Street Pattern In The Immediate Surrounding
______Traffic Pattern
______Identify Parallel Streets
______Direction Traveling
______Side Of Street Traveling On
______Directional Corner
______Identify Perpendicular Street In Front And Behind
______Identify Different Travel Surfaces
______Identify Distinguishing Characteristics Between Streets, Driveways, And Alleys
______Remembers And Uses Landmarks, Cues And Clues
______Curb Location (Parallel And Perpendicular)
______Shorelines (Only On One Or Both Sides)
______The Nature Of Sidewalks At Intersections
______The Nature Of Street Intersections (+, T, Y)
______The Nature Of Curbs At Street Intersections (Square, Rounded, And
______Blended)
______Opposite Relationship (East, West, North· South)
______Diagonal Relationship (Northeast· Southeast · Northwest -Southwest)
______Location Of Residence (Dividing Lines And Focal Points, Odd/Even Number Sequence, Block And Lot Numbers)
______Time Distance
______Use Of Sun And Wind Direction, Air Current As An Aid To Orientation
______Object Perception And Sound Shadows
______Tracking Moving Sound Source
______Track Stationary Object When In Motion
______Use Of Community Information Source
______Use Of Telephone

Residential Travel

_____Squaring Off With Sidewalk
_____Correcting A Line Of Travel
_____Maintaining Direction
_____Recovery From Veering
_____Negotiation Of Missing Slabs
_____Negotiation Of Raised Slabs
_____Negotiation Of Parked Cars
_____Negotiation Of Obstructions
_____Location - Identification Of Curbs
_____Location - Identification Of Intersecting Sidewalks

Residential Street Crossings

Methods Of Alignment

_____Shoreline
_____Square Curb
_____Round Curb
_____Maintaining Line Of Approach
_____Use Of Traffic Sound
_____Crossing Technique
_____Possibilities Of Veering
_____Recovery From Veering

Crossing With Traffic Lights

_____Acquaint With Various Traffic Control Devices
_____Acquaint With Various Light Signals (Turn Arrows, Scatter Lights, Blinking Yellow, Etc.)
_____Safety Islands
_____Light Cycle
_____Traffic Interpretation (Perpendicular & Parallel, One Way, Possibilities For Turning Cars)
_____Use Of Parallel Traffic For Alignment
_____Use Of Perpendicular Traffic For Alignment
_____Crossing Clockwise And Counter Clockwise
_____Where To Correctly Direct Attention When Crossing
_____Crossing Less Traveled Streets Parallel To Busy Street

Small Business Area Travel

_____Modification Of Touch Technique For Congested Areas
_____Discussion Of Sighted Mannerism -Eye Contact, Head Up, Etc.
_____Solicitation Of Assistance
_____Hines Break With Cane
_____Information, Discrimination, And Application

______Store Familiarization
______Veering Into Gas Stations, Parking Lots, Etc.
______Negotiation Of Railroad Tracks

Medium Business Area Travel

______Dealing With Crowds At Bus Stations
______Dealing With More Offers For Help
______Dealing With More Traffic Sounds
______Dealing With More Lighted Street Crossings
______Dealing With More Obstacles And Hazards Of Sidewalk
______Discriminating In Using Information
______Continued Store Familiarization And Purchasing
______Location Of Objectives

Heavy Business Area Travel

______Dealing With Crowds At Bus Stations
______Dealing With More Offers For Help
______Dealing With More Traffic Sounds
______Dealing With More Lighted Street Crossings
______Discriminating In Using Information
______Continued Store Familiarization And Purchasing
______Location Of Objectives
______Working In Large Department Stores With Possibilities Of Revolving Doors
______Use Of Escalators And Elevators
______Use Of Scatter Lights
______Ability To Distinguish Alleys From Streets

Rural

______Street With Curbs But No Sidewalks
______Street With No Curbs Or Sidewalks
______Detect Difference Between Street And Driveway In Unpaved Areas
______Detection Of Plane Or Texture Difference Of Road Shoulder Or Road And Property Line
______Use Of Hills And Slopes And Landmarks
______Use Of Auditory Clues - Nature Sounds
______Use Of Olfactory Cues
______Use Of Solar Clues
______Modifying The Touch And Drag, And Touch Techniques
______General Lay-Out Of City

C. O&M Cane Procurement Request

PROCUREMENT REQUEST
DEPARTMENT FOR THE BLIND AND VISION IMPAIRED

Accepts Small Purchase Credit Card (SPCC) ☐ Yes ☐ No

Date ______________________ P. O. No. ______________________

"for office use only"

☐ Administrative Services and Supplies

☐ Information Services for Computer or Related Services

D.

Contact: ______________________ Contact Phone No.: ______________________

E.

Ship To: ______________________ Invoice To: ______________________

F.

Source: ______________________ Vendor No.: ______________________

Fin No.: ______________________

Fax No.: ______________________

Phone No.: ______________________

G.

PRODUCT CODE	SUPPLY/ITEM DESCRIPTION (Color, size, Catalog No., UPC Code)	QTY	UNIT OF MEASURE	UNIT COST	TOTAL COST	OBJECT CODE
						1309
						1309
						1309
						1309
						1309
						1309
						1309
						1309
						1309
						1309
						1309
						1309
	TOTAL					

H.

I. THIS SECTION MUST BE COMPLETED

AGENCY	COST CODE	PROGRAM	PROJECT	TASK	PHASE	FUND	PERCENT	TOTAL
702	304 (RT)	045407	00000	00		0280		
702	474 (VR)	045404	44006	00		1000		
702	305 (Old Bld)	045407	50406	00		1000		

J.

K. REVIEWER: APPROVAL:

(Requesting Employee)	(Date)	(Commissioner/Designee)	(Date)
(Manager's Authorization)	(Date)	APPROVAL (IS)	(Date)
(Fiscal Review)	(Date)	(required for computer orders)	(Date)