# VR Standards for Provider Chapter 9: Assistive Technology for Sight-Related Disabilities

Revisions effective April 1, 2019

Contract Type: Assistive Technology – Customers with Visual Impairments

The contractor and contractor staff that provide services described in this chapter also must comply with Chapters 1–3 of the VR Standards for Providers manual.

## 9.1 Overview of Assistive Technology Services

Assistive technology (AT) services for customers who are blind or have visual impairment help a customer make informed choices about which AT products meet his or her vocational (work) or postsecondary educational needs (college or training). With AT training, a customer can learn how to use AT to succeed at work, school, and/or in vocational training.

## 9.2 Staff Qualifications

AT evaluators and trainers must meet the educational qualifications and other requirements outlined in this chapter.

To confirm qualifications, each individual (AT trainer, evaluator, and/or other staff member) who provides direct services to vocational rehabilitation (VR) customers must submit a [VR3455, Provider Staff Information](https://twc.texas.gov/forms/index.html) form to the designated regional program specialist (RPS).

A VR3455, Provider Staff Information form, is signed by the entity director and indicates a specific individual who is an evaluator, trainer, and/or staff member to provide services to customers. The RPS may request additional evidence to support the qualifications.

### 9.2.1 General Requirements

Evaluators and trainers must pay for their own travel and all associated costs to participate in testing required by the Assistive Technology Unit (ATU) and training for provider staff members. VR does not pay travel costs, including transportation, food, and lodging.

AT evaluators and trainers must maintain accurate contact information with the VR ATU to ensure that the information is accurate and up-to-date.

Evaluation providers must submit a current AT inventory list within 30 calendar days of contract signature, and submit updated inventory lists upon the purchase of new inventory. Evaluators and/or trainers must obtain new models, upgrades, or versions of approved software within 45 calendar days of product release. ATU prefers evaluators submit up-to-date AT inventory lists by email.

All VR service providers, including AT evaluators and trainers, must have a service authorization before they provide services to VR customers. The service provider must ensure that the service authorization indicates the specific services, dates, and number of hours he or she provides before providing any service to a VR customer. Only services properly indicated on the service authorization, can be funded by VR. Services provided out of date or in excess of the hours indicated on the service authorization do not qualify for payment.

Evaluators must conduct evaluations with a one-to-one evaluator-to-customer ratio. Facility-based trainers or on-site trainers can provide group training but must not exceed one staff member to three customers.

An assistive technology services provider delivers evaluations and/or training in a facility, a place of business owned, leased, operated, or otherwise occupied for business by the service provider, such as Lighthouse for the Blind. For our purposes, “on-site” refers to a location that is not owned, leased, or otherwise occupied for business by a service provider, such as a customer’s home, a public library, school, or worksite.

### 9.2.2 Assistive Technology Evaluator Qualifications

AT evaluators must have a high school diploma or GED, with four years of progressively responsible work experience in the education or rehabilitation of individuals who are blind or have visual impairment. A degree from an accredited college or university with specialization in computer science, education, rehabilitation, or a related field, with one year of work experience in the education or rehabilitation of individuals who have visual impairment, and/or other disabilities, is preferred.

Additionally, an AT evaluator must demonstrate:

* knowledge of computers and AT, technology applications, and technology evaluating methods for individuals who are blind or have vision impairment;
* an ability to simulate computer and technological environments similar to the situations in which a customer might encounter at work or in school;
* an ability to conduct objective evaluations and make objective recommendations; and
* proficiency in conducting AT evaluations on specific assistive equipment in accordance with VR standards and periodic proficiency tests conducted by VR.

### 9.2.3 Assistive Technology Trainer Qualifications

AT trainers for customers who are blind or have visual impairment must have a high school diploma or GED and demonstrate:

* knowledge of computers and AT for individuals with disabilities;
* knowledge of computer and AT applications for individuals with visual and/or other disabilities;
* appropriate instructional methods for individuals who are blind or have vision impairment;
* ability to adjust training to meet the specific needs of each customer; and
* proficiency in AT training on specific assistive equipment in accordance with VR standards, and periodic proficiency tests conducted by VR.

### 9.2.4 Proficiency Tests Required for AT Evaluators and Trainers

Before an AT evaluator or trainer can contract with VR to train customers, the evaluator or trainer must pass proficiency tests, written, administered, and scored by ATU. An AT evaluator or trainer must be approved by ATU prior to training on a product.

The proficiency tests are:

* Two preliminary tests:

1. Phase I: A series of written tests covering Microsoft Office, Microsoft Windows, the Standards for Providers manual, and at least one type of assistive technology software chosen by the test taker, such as ZoomText or JAWS. The Phase I tests may be taken online or in person at the ATU Lab. The test taker must pass Phase I to advance to Phase II.
2. Phase II: A role-playing test that measures a test taker’s ability to train or evaluate customers who use AT. The test is offered by arrangement at the ATU Lab at the Criss Cole Rehabilitation Center in Austin.

After an evaluator or trainer passes the Phase I and II tests, he or she can train a customer in keyboarding; Windows; Microsoft Office (MS), including MS Word, MS Excel, MS Outlook, and MS PowerPoint; and the AT software that the evaluator or trainer passed in Phase I.

* Product-specific tests:

To teach additional subjects, the evaluator or trainer must pass additional product-specific tests.

ATU offers product-specific tests online, written, administered, and scored by ATU. The product-specific tests include tests on AT software programs by version, tests on various operating systems, and tests on other AT products.

ATU maintains a list of trainers approved to train customers to use specific AT products. The list includes trainers who have passed AT product-specific tests after passing the Phase I and II tests. To find an approved evaluator or trainer, VR counselors refer to the list.

To be added to the approved list, an evaluator or trainer must contact ATU for testing. Customers select an evaluator or trainer based on informed choice and the providers’ availability.

* Product-update tests:

ATU updates AT product-specific proficiency tests when a version of a product changes significantly, and administers and scores the tests online. AT evaluators and trainers who are approved to train customers to use specific AT products must pass update tests to maintain authorization.

VR approves individual evaluators, trainers, and staff members. VR does not approve training or evaluating entities or positions.

VR approval to serve VR customers is not transferable to other evaluators, trainers, and staff members.

ATU administers updated proficiency tests to approved evaluators and trainers when a product version significantly changes. AT evaluators and trainers must pass test updates, and agree to routine performance monitoring conducted by a RPS or other VR representative to maintain authorization.

### 9.2.5 Annual Training

Both AT evaluators and trainers must attend an annual Train-the-Trainer Workshop offered by VR ATU.

An evaluator or trainer who is unable to participate in an annual training must obtain permission from ATU to attend an alternative training approved by ATU, or, if available, a make-up training offered by ATU. If approved, the evaluator or trainer must keep a copy of the approval email from ATU in his or her files.

### 9.2.6 Contract Modifications

An evaluator or trainer is authorized to evaluate or train customers for specific products, and to charge for services per his or her contract. An evaluator or a trainer cannot modify a contract to train in a subject area for which he or she has not been approved by ATU.

To charge a special rate for services, such as group skills training not specified in the provider's contract, the evaluator or trainer must obtain written permission using a VR3472, Contracted Service Modification Request. The trainer must keep the signed VR3472 in the customer's record.

### 9.2.7 Unannounced On-Site Visits

VR may conduct unannounced on-site visits to:

* observe an evaluator and/or trainer when he or she is providing a service to a customer;
* interview a customer about his or her evaluation and/or training experience;
* confirm that the evaluator and/or trainer is using:
  + the latest versions of software and products on the approved products list;
  + full working copies of approved software, not demonstration or trial versions; and
  + versions compatible with the required operating systems; and
* verify that an evaluator and/or trainer:
  + meets VR minimum requirements for AT services; and
  + employs staff members (if applicable) who meet VR minimum requirements outlined in [9.2 Staff Qualifications](https://twc.texas.gov/standards-manual/vr-sfp-chapter-09#s92); and
  + maintains the minimum equipment inventory of AT and software required for the specific evaluation and training for which the evaluator and/or trainer is approved is in working order.

Evaluators and trainers must obtain new models, upgrades, or versions of approved software within 45 calendar days of product release; and submit an up-to-date AT inventory list to VR ATU.

## 9.3 Assistive Technology Evaluations

### 9.3.1 Service Description

AT evaluations help a customer identify which AT products he or she would choose when presented with more than one product of the same type. Through product demonstration, an AT evaluation gives a VR customer an opportunity to compare competing products under the guidance of an AT expert to determine which products might best address the customer's vocational and/or postsecondary needs. A VR counselor and customer can discuss products the customer evaluated to determine which might most help the customer meet his or her vocational goal when the customer develops his or her individualized plan for employment (IPE). The evaluator reports what the customer said and did when viewing a product.

In the event a VR counselor decides to make a purchase, the customer uses the report to make an informed choice about which products to purchase. The evaluator's recommendation is not a recommendation to make a purchase, but rather, what to purchase in the event a VR counselor makes a purchase.

An evaluator must conduct an AT evaluation for each customer at the evaluator's facility using at least two competing products (customer-to-evaluator ratio must be 1:1). If only one version of a product is available, the evaluator must request approval from the customer's VR counselor in writing. The VR counselor obtains written approval from ATU through email. If approved, the evaluator must keep the email with the ATU approval in the customer's record.

The AT evaluations must include the following three components:

* Interview
* Observation and assessment
* Post-evaluation discussion

When conducting the evaluation, the evaluator must not imply that the VR counselor agrees to make a technology purchase.

Evaluators must only evaluate customers on products and equipment included on the VR-approved products list, including:

* video magnifiers;
* screen magnification programs;
* screen magnification programs with speech;
* screen reader programs;
* refreshable braille displays;
* optical character recognition (OCR) scanning software;
* stand-alone, portable, and USB OCR scanners;
* braille notetakers;
* braille embossers; and
* speech input software.

To show any product that is not included on the approved products list for the Texas Workforce Commission (TWC), the evaluator must first request approval from the VR counselor in writing. The VR counselor obtains written approval from ATU through email. If approved, the evaluator must keep the email with the ATU approval in the customer's record.

Questions about the approved products list may be directed to ATU at [vr.atu@twc.state.tx.us](mailto:vr.atu@twc.state.tx.us).

### 9.3.2 Process and Procedure

The VR counselor sends the evaluator a referral packet that consists of the following:

* A [VR1884, Assistive Technology Services for Sight-Related Disabilities Referral](https://twc.texas.gov/forms/index.html);
* An EAS report or a basic consultation report that is less than one year old. **Exception:** An EAS or basic consultation report is not required if the customer is to evaluate a video magnifier (also known as a closed-circuit television or CCTV) and the magnifier does not connect to a computer system;
* A typing score of at least 30 words per minute (wpm)—or a waiver of the typing speed from ATU; and
* A valid service authorization.

To refer a customer to evaluate braille products (including braille displays and notetakers), the VR counselor must also include:

* A braille reading speed test score of at least 50 words per minute (wpm); or
* A waiver of the braille speed from ATU.

The evaluator must:

* maintain a one-to-one evaluator-to-customer ratio;
* limit product categories to only those indicated on the EAS Consultation report or Basic Consultation report;
* document his or her observations from the evaluation interview using the [VR1886, Assistive Technology Evaluation](https://twc.texas.gov/forms/index.html);
* discuss the results of the evaluation and review equipment recommendations with the customer; and
* answer any questions the customer has regarding the evaluation process and/or recommendations.

The evaluator and customer must sign the original VR1886. The evaluator must not promote one product over another during the evaluation.

### 9.3.3 Outcomes Required for Payment

The evaluator documents all the information required by the service description on the [VR1886, Assistive Technology Evaluation](https://twc.texas.gov/forms/index.html) report, to show:

* the evaluation was completed without exceeding the one evaluator to one customer ratio;
* all necessary accommodations, compensatory techniques, and special needs were provided as necessary for the customer to complete the evaluation;
* the customer's performance, skills, and needs were evaluated and results summarized; and
* the customer chose the AT identified on the EAS report or Basic Consultation report.

The evaluator must submit a completed report to the customer’s VR counselor within 10 working days from the date of the evaluation.

The VR counselor pays for the evaluation after he or she approves the report and receives an invoice. The VR counselor only approves reports that are accurate, complete, and meet all service requirements.

An evaluation is an outcome-based service. The VR counselor cannot pay for incomplete services. All topics in the service description and service authorization must be addressed.

### 9.3.4 Fees

See [9.6 Assistive Technology Services Fees](https://twc.texas.gov/standards-manual/vr-sfp-chapter-09#s96) for details.

## 9.4 Baseline Assessments

### 9.4.1 Service Description

A baseline assessment is the first step in the AT training process and must be completed before a trainer can deliver training services.

If the baseline assessment information is missing from the EAS report or Basic Consultation report, or if the assessment is over one year old, the trainer must contact the VR counselor to obtain a copy of the customer’s valid baseline assessment. If the customer was not assessed, or if the assessment has expired, the trainer must obtain a valid service authorization from the VR counselor to administer the baseline assessment before training the customer.

The trainer must document the results of the baseline assessment on the VR2902, Assistive Technology Training: Baseline Assessments.

Baseline assessments expire one year after the completion date.

To ensure that a customer can evaluate braille products (including braille displays and notetakers), the results of the baseline assessment must show that the customer can:

* type at least 30 wpm; and
* read braille (contracted or uncontracted) at 50 wpm.

The VR counselor may ask the manager of evaluation and support services (ATU manager) to waive the speed requirements for typing and/or braille if the customer:

* is employed; or
* has secondary disabilities that significantly affect typing and braille speeds.

### 9.4.2 Process and Procedure

To authorize services for a customer, the VR counselor sends the trainer a referral packet that consists of the following:

* a VR1884, Assistive Technology Services for Sight-Related Disabilities Referral;
* an EAS report or basic consultation report that is less than one year old;
* a typing score of at least 30 words per minute (wpm)—or a waiver of the typing speed from ATU; and
* a valid service authorization.

To refer a customer to train using braille products (including braille displays and notetakers), the VR counselor must also include:

* A braille reading speed score of at least 50 words per minute (wpm); or
* A waiver of the braille speed from ATU.

The trainer must not provide services until the VR counselor sends a referral packet with a valid service authorization to the trainer.

The trainer must:

* maintain a one-to-one trainer-to-customer ratio;
* document his or her observations from the assessment on the [VR2902, Assistive Technology Training: Baseline Assessments](https://twc.texas.gov/forms/index.html); and
* sign the original VR2902.

### 9.4.3 Outcomes Required for Payment

The trainer documents all the information required by the service description on the [VR2902, Assistive Technology Training: Baseline Assessments](https://twc.texas.gov/forms/index.html), to show that:

* the assessment was completed without exceeding the one trainer-to-one customer ratio;
* all necessary accommodations, compensatory techniques, and special needs were provided as necessary for the customer to complete the assessment;
* the customer can identify and define computer hardware;
* the customer understands software types;
* the customer understands the concept of multi-key commands; and
* the customer's typing speed.

The trainer must submit a completed report within 10 working days from the date of the assessment to the customer's VR counselor.

Payment for the baseline assessment is made when the VR counselor approves a complete, accurate, signed, and dated:

* [VR2902, Assistive Technology Training: Baseline Assessments](https://twc.texas.gov/forms/index.html); and
* invoice.

An assessment is an outcome-based service. The VR counselor cannot pay for incomplete services. All topics in the service description and service authorization must be addressed.

### 9.4.4 Fees

See [9.6 Assistive Technology Services Fees](https://twc.texas.gov/standards-manual/vr-sfp-chapter-09#s96) for details.

## 9.5 Assistive Technology Training

### 9.5.1 Service Description

AT training helps a customer learn to use AT, including AT equipment, hardware, computer systems, and software. Training may be provided at a service provider's facility, in the customer's home or workplace, or at a community resource center.

An AT trainer must follow the training guidelines provided by VR, including the guidelines for administering a baseline assessment, training the customer, and administering a post-training assessment. Training guidelines recommend training content, duration, activities, and measurement criteria. An AT trainer trains the customer using the customer’s equipment or equipment at the customer’s workplace, if applicable.

To provide more training hours than recommended for a training activity, the trainer must obtain approval from the VR counselor. If the VR counselor approves the additional training hours, the trainer must obtain a valid service authorization.

If the trainer requests hours of additional training time exceeding the VR counselor's approval level, he or she must obtain permission from the VR counselor to modify his or her contract. If the VR counselor agrees, the VR counselor provides the trainer with a [VR3472, Contracted Service Modification](https://twc.texas.gov/forms/index.html), signed by the director of VR Services. The trainer must keep the signed VR3472 in the customer's record.

#### 9.5.1.1 Keyboarding Skills

A trainer can provide Keyboarding Skills training in a customer's home or at a facility at the discretion of the customer's VR counselor. The trainer must structure lessons so that a customer achieves the Keyboarding Skills training objectives indicated on [VR1888, Assistive Technology Training Results](https://twc.texas.gov/forms/index.html).

A VR counselor can authorize up to 15 hours for QWERTY Keyboard training, up to 12 hours for Extended Keyboard training, and up to five additional Keyboarding Skills training hours.

#### 9.5.1.2 Setting up the Workstation

A customer who trains in Setting up the Workstation (SUW) learns to set up and use the electronic equipment in his or her home or office (if applicable). Most customers complete SUW training in four-to-six hours, depending on the complexity of the workstation and the customer's abilities and skills. A VR counselor can authorize up to five additional SUW hours.

The trainer must structure lessons so that the customer achieves the training objectives for SUW indicated on VR1888, Assistive Technology Training Results.

#### 9.5.1.3 Operating Systems and Features and Functions

Setting Up the Workstation (SUW) training is a prerequisite for Operating Systems and Features and Functions (OSFF) training. A customer who trains in OSFF learns to locate the control panel; open folders and files on the C: drive; move files from removable storage; perform basic system maintenance, such as disk cleanup and disk defragmentation; and use system restore.

Most customers complete OSFF training in 10 to 12 hours. A VR counselor can authorize up to five additional hours.

The trainer must structure lessons so that the customer achieves the OSFF training objectives indicated on VR1888, Assistive Technology Training Results.

#### 9.5.1.4 Screen Readers

A customer who trains in screen readers learns to access documents, applications, and operating systems using screen reader software. The training includes teaching the customer how to install the software and set defaults on his or her computer and modify verbosity options for each application. On completion, the customer can explain the differences between the virtual cursor, the mouse cursor, the invisible cursor, and the PC cursor; and, if applicable, the customer can read a word, line, and sentence using keyboard commands associated with the screen reader software.

Most customers complete Screen Reader training in 12-15 hours depending on the complexity of the workstation, and the customer's abilities and skills. A VR counselor can authorize up to five additional hours.

The trainer must structure lessons so that the customer achieves the Screen Reader training objectives indicated on VR1888, Assistive Technology Training Results.

#### 9.5.1.5 Screen Magnification and Screen Reader

A customer who takes Screen Magnification and Screen Reader training learns to access documents, applications, and operating systems using screen magnification reader software. The training includes teaching the customer how to install the software and set defaults on his or her computer, and modify verbosity options for each application.

The trainer must structure lessons so that the customer achieves the Screen Magnification and Screen Reader training objectives indicated on VR1888, Assistive Technology Training Results.

#### 9.5.1.6 Braille Access

Training in Braille Access is predicated on the ability to use a computer system with and without speech, and with and without braille display. Braille Access training teaches the customer how the braille display interacts with the screen reader.

On completion, a customer can operate his or her computer system with or without speech, and with or without braille; identify the need for drivers to be loaded for the display to work; operate all the keys on the front panel of the display; move the cursor and use cursor routing keys; and read a file using different methods.

Most customers complete Braille Access training in five-to-seven hours. A VR counselor can authorize up to five additional hours.

The trainer must structure lessons so that the customer achieves the Braille Access training objectives indicated on VR1888, Assistive Technology Training Results.

#### 9.5.1.7 Speech Recognition Access

Speech Recognition Access training enables a customer to understand the integration of the speech recognition and screen access software and train the speech recognition software and save voice files.

Most customers complete Speech Recognition Access training in 60-to-90 hours. A VR counselor can authorize up to 10 additional hours.

The trainer must structure lessons so that the customer achieves the Speech Recognition Access training objectives indicated on VR1888, Assistive Technology Training Results.

#### 9.5.1.8 Introduction to Word Processing

Introduction to Word Processing training enables a customer to use word processing software to create, compose, and save documents, and to perform related basic word processing tasks.

Most customers complete Introduction to Word Processing training in 10-to-12 hours. A VR counselor can authorize up to five additional hours.

The trainer must structure lessons so that the customer achieves the Introduction to Word Processing training objectives indicated on VR1888, Assistive Technology Training Results.

#### 9.5.1.9 Intermediate Word Processing

Intermediate Word Processing training is predicated on completing Introduction to Word Processing. On completion, the customer can change page margins, page orientation, text alignment and justification (center, left, and right aligning and full justification); use the find and replace feature; and change the space between lines and paragraphs.

A customer usually completes Intermediate Word Processing in 10-to-15 hours. A VR counselor can authorize up to five additional hours.

The trainer must structure lessons so that the customer achieves the Intermediate Word Processing training objectives indicated on VR1888, Assistive Technology Training Results.

#### 9.5.1.10 Advanced Word Processing

Advanced Word Processing is predicated on completing Intermediate Word Processing. On completion, the customer can use advance editing functions including styles, sections, columns, page numbers, headers, and footers. He or she can insert a table, choose a table layout, copy and paste a table into a document, convert a table to text and text to a table, and move the cursor within cells as well as create address labels and envelopes.

A customer usually completes Advanced Word Processing in four-to-six hours. A VR counselor can authorize up to five additional hours.

The trainer must structure lessons so that the customer achieves the training objectives for Advanced Word Processing indicated on VR1888, Assistive Technology Training Results.

#### 9.5.1.11 Scanning and Embossing: Scanner Connected to a Computer

In Scanner Connected to a Computer training, a customer learns how to operate a scanner that is attached to a computer and how to use assistive OCR software.

On completion, he or she can explain the relationship between the speech component of the scanning software and the screen reader; customize the speech output in the scanning software; use the scanning functions within the assistive software; edit, save, and import and export documents; and modify and set the screen magnification options in the assistive software.

A customer usually completes Scanner Connected to a Computer training in six-to-eight hours. A VR counselor can authorize up to five additional hours.

The trainer must structure lessons so that the customer achieves the training objectives for Scanner Connected to a Computer training indicated on VR1888, Assistive Technology Training Results.

#### 9.5.1.12 Scanning and Embossing: Stand-Alone Scanner

In Stand-Alone Scanner training, a customer learns how to use the control panel or keypad on the scanner to retrieve files and save files to a folder, removable storage device, or disc.

On completion, the customer can read through scanned text (by word, line, and paragraph) using the keypad; save scanned text as a file to a folder, removable storage device, or disc; and retrieve and read files from a folder, removable storage device, or disc.

A customer usually completes Stand-Alone Scanner training in four-to-six hours. A VR counselor can authorize up to five additional hours.

The trainer must structure lessons so that the customer achieves the training objectives for Stand-Alone Scanner training indicated on VR1888, Assistive Technology Training Results.

#### 9.5.1.13 Scanning and Embossing: Embossing with Braille Translation Software

In Embossing with Braille Translation Software training, a customer learns how to install the braille embosser, load paper into the embosser and choose the single- or double-sided mode, set up the top of the form, operate the keypad or control panel on the embosser, and use braille translation software.

On completion, to the customer can use the keypad, control panel, and other switches on the front panel to program the braille embosser; load a text document and format and edit it for braille embossing; and emboss a correctly formatted document in contracted (Grade 2) braille.

A customer usually completes Embossing with Braille Translation Software training in four-to-six hours. A VR counselor can authorize up to five additional hours.

The trainer must structure lessons so that the customer achieves the Embossing with Braille Translation Software training objectives training indicated on VR1888, Assistive Technology Training Results.

#### 9.5.1.14 Introduction to Notetakers

In Introduction to Notetakers training, a customer learns how to explain the architecture of the notetaker software (linear structure or Windows type); use external features of the device including ports, jacks, and chargers; change speech parameters; use the help menus; and navigate the device menus, including pull-down, file, and status menus.

On completion, the customer can locate the charger, jacks, and ports on the notetaker; change the rate, pitch, and frequency of speech; create, delete, and rename files and folders; read, write, and edit text within a file; locate the braille cursor on notetakers with a braille display, if applicable; use the braille display to "pan" the display and read by word, line, and paragraph; and use the cursor-routing key's notetaker menus.

A customer usually completes Introduction to Notetakers training in three-to-six hours. The VR counselor can authorize up to five additional training hours.

The trainer must structure lessons so that the customer achieves the training objectives for Introduction to Notetakers training indicated on VR1888, Assistive Technology Training Results.

#### 9.5.1.15 Advanced Functions of Notetakers

In Advanced Functions of Notetakers training, the customer learns how to use removable media with the notetaker; connect the notetaker to other devices; and perform miscellaneous functions such as set the time and date; use the calculator; use the address book; and format documents.

On completion, the customer can locate the charger, jacks, and ports on the notetaker; change the rate, pitch, and frequency of speech; create, delete, and rename files and folders; read, write, and edit text within a file; locate the braille cursor on notetakers with a braille display, if applicable; use the braille display to "pan" the display and read by word, line, and paragraph; and use the cursor routing key's notetaker menus.

A customer usually completes Advanced Functions of Notetakers training in two-to-four hours. A VR counselor can authorize up to three additional hours.

The trainer must structure lessons so that the customer achieves the Advanced Functions of Notetakers training objectives indicated on VR1888, Assistive Technology Training Results.

### 9.5.2 Process and Procedure

To authorize training services for a customer, the VR counselor sends the trainer a referral packet that consists of the following:

* A VR1884, Assistive Technology Services for Sight-Related Disabilities Referral
* An EAS report or a basic consultation report that is less than one year old. **Exception:** An EAS or basic consultation report is not required if the customer is to evaluate a video magnifier (also known as a closed-circuit television or CCTV) and the magnifier does not connect to a computer system;
* A typing score of at least 30 words per minute (wpm)—or a waiver of the typing speed from ATU; and
* A valid service authorization.

To refer a customer to train using braille products (including braille displays and notetakers), the VR counselor must also include:

* A braille reading speed score of at least 50 words per minute (wpm); or
* A waiver of the braille speed from ATU.

The trainer must not provide services until the VR counselor sends a referral packet with a valid service authorization to the trainer.

The trainer must:

* maintain a ratio of one trainer to no more than three customers;
* document his or her observations from the assessment on the [VR2902, Assistive Technology Training: Baseline Assessments](https://twc.texas.gov/forms/); and
* sign the original VR2902.

#### 9.5.2.1 Exceptions

To offer training that deviates from the approved curriculum and/or time frames, the trainer must:

* consult with the assigned RPS and the customer's VR counselor; and
* complete a VR3472, Contracted Service Modification Request.

If an exception is granted, the trainer must:

* document the approval in the training report; and
* file the approved VR3472 in the customer's record.

The documentation must include:

* the reason for the exception;
* the amended training objectives; and
* the results of the training, as documented on VR1888, Assistive Technology Training Results.

AT trainers must not:

* make recommendations or discuss additional training time, equipment, or software upgrades with the customer or in the customer's presence. Equipment recommendations are discussed only with the customer's VR counselor, the EAS, or the trained designee who completed the consultation report;
* install programs or equipment to a customer's computer system without prior written approval from the customer's VR counselor. The VR counselor consults with the EAS or trained designee who completed the consultation report before authorizing the installation; or
* solicit training, consultation, or referrals from customers.

#### 9.5.2.2 Training Report Documentation

The AT trainer must document the activities and outcomes of each training session, at least monthly on the [VR2868, Assistive Technology Training](https://twc.texas.gov/forms/index.html) report, including:

* a detailed narrative of each training session;
* the amount of time spent on each product; and
* the customer's progress toward objectives identified in the baseline assessment.

If training services are interrupted for 90 days or more, for any reason, then the service provider must contact the customer's VR counselor in writing to inquire about the customer's status.

Training cannot exceed more than six hours per day per customer. Any exceptions must be approved in writing by the VR counselor and RPS.

#### 9.5.2.3 Post-Training Assessment

AT trainers must list objectives on the VR2868, Assistive Technology Training report, and document whether the objectives were met or unmet. The AT trainer must conduct the post-training assessment when training is complete.

A final training report must be submitted to the VR counselor within 10 working days from the date training is complete. The post-training assessment is completed on the same day as the final training session unless training is not complete and additional training is being requested.

If the post-training assessment indicates the need for additional training that exceeds the maximum number of hours for that training activity on the original service authorization, the trainer must submit a request for additional hours to the customer's VR counselor in writing and maintain that request and approval (if applicable) in the customer's record, and obtain a valid service authorization for the additional hours.

The EAS, VR counselor, RPS, ATU staff, or designee may observe the post-training assessment.

The post-training assessment is documented on [VR2902, Assistive Technology Training: Baseline Assessments](https://twc.texas.gov/forms/index.html), and requires a separate line item on the service authorization.

#### 9.5.2.4 Changes to Computer Settings

Upon completion of training, the trainer must provide the customer with electronic files of any application changes, such as Windows and Microsoft Office settings, as well as AT preferences, to user preferences and settings. The file must be saved in an accessible place on the customer's computer system. The trainer must also document changes to user preferences and settings in the training report.

#### 9.5.2.5 Customer Equipment Troubleshooting

If the AT trainer discovers a problem with the customer's equipment, hardware, or software, the trainer may spend a maximum of one hour of training time troubleshooting to resolve the issue.

The trainer must contact the customer's VR counselor by email to report the problem within one working day of the training session. The trainer must also document the details of the problem, including the amount of time spent troubleshooting, on the training report.

### 9.5.3 Outcomes Required for Payment

The trainer completes each section of the [VR2902, Assistive Technology Training: Baseline Assessments](https://twc.texas.gov/forms/index.html), and [VR2868, Assistive Technology Training](https://twc.texas.gov/forms/index.html) report, to verify that the trainer:

* delivered training without exceeding the ratio of one trainer to three customers;
* provided all necessary accommodations and compensatory techniques to enable the customer to participate in training;
* measured and documented the customer's performance, skills, and progress; and
* completed a post-training assessment.

The trainer completes the applicable sections of the [VR1888, Assistive Technology Training Results](https://twc.texas.gov/forms/index.html), which is a measurement tool that helps the trainer describe the customer's progress for specific training activities at the completion of training.

The trainer must submit the final training report within 10 working days from the date of the last service. The trainer must send the report by encrypted email to the:

* customer's VR counselor; and
* EAS, or VR staff member who completed the Basic Consultation report.

The VR counselor pays the invoice after he or she verifies that all training objectives and outcomes are met, and approves the following required documentation:

* [VR2902, Assistive Technology Training: Baseline Assessments](https://twc.texas.gov/forms/index.html)
* [VR2868, Assistive Technology Training](https://twc.texas.gov/forms/index.html) report
* VR1888, Assistive Technology Training Results
* Invoice

AT training is an outcome-based service. The VR counselor cannot approve required documentation that is incomplete or unsigned. All topics in the service description and service authorization must be addressed.

If a customer is unable to demonstrate the level of proficiency indicated on the [VR1888, Assistive Technology Training Results](https://twc.texas.gov/forms/index.html) at the completion of training, or fails to complete the training, a trainer may request payment for training hours he or she conducted by completing a VR1888, Assistive Technology Training Results and submitting an invoice. The trainer must provide an explanation for the incomplete service in the appropriate section of the VR1888, Assistive Technology Training Results. Payment for incomplete services is at the VR counselor's discretion.

### 9.5.4 Fees

See [9.6 Assistive Technology Services Fees](https://twc.texas.gov/standards-manual/vr-sfp-chapter-09#s96) for details.

## 9.6 Assistive Technology Services Fees

### 9.6.1 On-Site Services Fees

|  |  |  |
| --- | --- | --- |
| **Service** | **Unit Rate** | **Hours** |
| AT Baseline Assessment | $37.00 each | N/A |
| AT Post-Training Assessment | $37.00 each | N/A |
| Individual AT Training | $75.00 per hour | N/A |
| Group AT Training | $30.00 per hour per customer | N/A |

### 9.6.2 Facility-Based Services Fees

|  |  |  |
| --- | --- | --- |
| **Service** | **Unit Rate** | **Hours** |
| AT Baseline Assessment | $20.00 each | N/A |
| AT Post-Training Assessment | $20.00 each | N/A |
| Individual AT Training | $40.00 per hour | N/A |
| Group AT Training | $30.00 per hour per customer | N/A |
| AT Independent Practice Time | $10.00 per hour | N/A |
| Keyboarding Baseline Assessment | $5.00 each | N/A |
| Keyboarding Post-Training Assessment | $5.00 each | N/A |
| Individual Keyboarding Skills Training | $20.00 per hour | N/A |
| Lab Keyboarding Skills Training | $10.00 per hour | N/A |