# Vocational Rehabilitation Standards for Providers Manual Chapter 5: Orientation and Mobility Services

Contract Subject: Orientation and Mobility

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.

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## 5.1 Overview of Orientation and Mobility Services

Orientation and Mobility (O&M) services prepare blind and visually impaired customers to travel independently with competence and confidence.

O&M specialists offer complex, interrelated services designed to develop independent travel skills in individuals who are blind or visually impaired. O&M services begin with an assessment and can include training held in environments frequently visited by customers.

Orientation is the process of using the available senses to establish one's position and relationship within the environment.

Mobility is the ability to travel in the environment with the help of an established tool (including white canes, dog guides, and electronic travel aids).

O&M assessments and training can be provided in locations within the customer's home or community. O&M assessments and training are provided in person and cannot be provided remotely.

Examples of training locations include:

* the customer's home (indoor and outdoor);
* public areas, such as a bank, church, or doctor's office;
* commercial areas, such as a grocery store or mall;
* transit systems, such as public transportation, paratransit, and taxis;
* rural areas;
* residential areas (with light traffic and stop signs);
* small business areas (with heavier traffic and simple traffic lights);
* downtown areas (with heavy traffic and complex traffic lights); and
* commercial modes of travel, such as trains and planes.

Any request to change a Service Description, Process and Procedure, or Outcomes Required for Payment must be documented and approved by the VR director, using the VR3472, Contracted Service Modification Request for Blind and Visually Impaired Services, before the change is implemented. The approved VR3472 must be maintained in the provider’s customer case file. For more information, refer to VR-SFP 3.4.11 Contracted Services Modification Request.

For information on acceptable signatures refer to VR-SFP sections 3.2.14 Documentation and 3.2.16 Signatures.

All fees for services described in this chapter can be found in VR-SFP 5.5 Orientation and Mobility Service Fees.

## 5.2 Qualifications and Training

Before services are provided, the service provider director must:

* approve VR3455, Provider Staff Information Form, which is completed by each of the provider's staff members, such as specialists and interns (the form must include the staff members' qualifications as stated in 5.2.1 and provide evidence that the staff member meets the qualifications); and
* submit the approved form to the provider's assigned contract manager and assigned regional program specialist.

### 5.2.1 Orientation and Mobility Specialist

The O&M specialist must meet one of the following criteria:

* Be certified by the Academy for Certification of Vision Rehabilitation and Education Professionals (ACVREP) or the National Blindness Professional Certification Board (NBPCB)
* Have a degree in O&M from an accredited college or university with an established O&M training curriculum and become certified by ACVREP or NBPCB within one year of being hired by a service provider
* Have at least two years of full-time experience teaching O&M skills for an entity that VR recognizes, such as a rehabilitation center, a Veterans Administration hospital, or an educational system, and:
	+ provide three professional references indicating the candidate's ability to teach O&M skills to blind or visually impaired individuals; and
	+ be certified by ACVREP or NBPCB within one year of being hired by the service provider.

#### 5.2.1.1 Required Texas Confidence Builders Training for O&M Specialists

In addition to meeting the requirements for education, training, and experience described in 5.2.1 Orientation and Mobility Specialist, all prospective O&M providers must successfully complete the Orientation and Mobility Texas Confidence Builders training before becoming providers.

Texas Confidence Builders training is a two- to three-day training program offered in Austin. While the training is provided free of cost, providers must pay all costs associated with attending the training program. Contact the state office O&M program specialist to schedule the training.

### 5.2.2 Annual Staff Training

To ensure that O&M specialists remain competent in their skills, VR recommends that each O&M trainer complete a minimum of 20 hours of blindfold travel per fiscal year, so that the O&M trainer:

* practices his or her own independent travel skills;
* provides effective role modeling; and
* promotes independent travel as a confidence-building tool for customers.

Examples of recommended activities for blindfold travel include:

* traveling around a city block;
* traveling on an L-shaped sidewalk route;
* traveling to the grocery store; and
* exploring a new neighborhood.

VR also recommends that O&M specialists:

* create a report like the Sample Orientation and Mobility Provider's Independent Travel Activity Report; and
* send a copy of their travel activity report to the assigned regional program specialist for VR.

### 5.2.3 Orientation and Mobility Interns

O&M service providers are ultimately responsible for the monitoring, supervision, and follow-up of the O&M intern during the internship.

O&M service providers using interns to work with vocational rehabilitation (VR) customers must:

* have an O&M specialist with ACVREP or NBPCB certification observe each intern for a minimum of 12 lessons during the internship and document the observations on VR2922, Orientation and Mobility Weekly Internship Observation;
* submit VR2922 to the regional program support specialist each month during the internship; and
* submit VR2923, Orientation and Mobility Internship Performance Evaluation to the designated regional program specialist within 35 days of completion of the internship.

The O&M intern must:

* attend Texas Confidence Builders training in Austin or attend another approved training with the VR in-house O&M designee before working with blind and visually impaired customers;
* be supervised by an approved VR-certified O&M provider for the duration of the internship;
* be observed by a VR-certified O&M provider for a minimum of 12 lessons during the internship; and
* sign and then forward reports to the supervising O&M provider that maintains either the ACVREP or NBPCB for his or her approval.

Note: VR does not pay for any expenses incurred by the intern during the internship.

## 5.3 Orientation and Mobility Assessment

### 5.3.1 Orientation and Mobility Assessment Service Description

The assessment includes an evaluation of the customer's O&M skills in multiple situations in person and cannot be conducted remotely.

Assessments may be conducted using the customer's functional vision. Functional vision refers to the way in which an individual uses whatever vision he or she has in a given travel situation. Assessments provide an opportunity for customers to recognize that their vision might not meet all their travel needs.

Locations for assessments include a combination of:

* the customer's home and immediate surrounding area;
* public areas, such as a church, park, or college campus;
* commercial areas, such as a bank, store, or mall;
* transit systems, such as paratransit or taxis (if available);
* local buses and similar public transportation (if available);
* rural areas (if applicable);
* residential areas (those with light vehicle and foot traffic and some stop signs);
* small business areas (those with heavier traffic and simple traffic lights);
* downtown areas (those with heavy vehicle and foot traffic and complex traffic lights);
* commercial transportation systems, such as buses, trains, and airplanes (if applicable); and
* travel using low-vision devices (if applicable).

For Independent Living Services for Older Individuals Who Are Blind (OIB) customers, the OIB worker authorizes a maximum of three hours for the initial assessment to be completed.

The O&M specialist must include in the initial assessment observations of and recommendations on white cane skills. The recommended number of hours allowed for training must include the customer's travel needs, regardless of the mobility tool (dog or white cane). Training with a guide dog must not exceed more than four hours and must be preapproved in writing by the VR counselor or OIB worker.

Recommendations for training must be:

* documented under the summary section of VR2894, Orientation and Mobility Assessment; and
* submitted to the VR counselor or OIB worker.

Following the assessment, it is recommended that the O&M specialist reviews the results with the customer and answers any questions that the customer might have about the recommended training.

### 5.3.2 Process and Procedure

The VR counselor or OIB worker completes the VR2897, Orientation and Mobility Referral, leaving no blanks and putting NA (not applicable) as needed. After completion of the form, the VR counselor or OIB worker sends it to the provider that has been chosen by the customer. Included with the referral is information that helps the O&M specialist assess and recommend training for the customer.

The VR counselor or OIB worker is responsible for authorizing an O&M assessment and approving services, including approving the documentation for payment when invoiced.

Based on the results of the O&M assessment, the VR counselor or OIB worker determines the training goal and hours to be funded by VR or OIB. No assessments or training sessions are completed before a service authorization is issued.

After submitting VR2894, Orientation and Mobility Assessment, the O&M specialist must contact the customer's VR counselor or OIB worker to discuss the initial assessment. This discussion must be documented and filed in the O&M provider's customer file.

The discussion includes:

* the O&M specialist's recommendations for training (if any), including the:
	+ O&M skills needed;
	+ proposed completion date; and
	+ number of training hours authorized by the customer's VR counselor or OIB worker;
* anticipated delays in services, if any;
* special considerations or extended direct training dates, if any;
* the customer's readiness to begin nonvisual O&M skills training; and
* the customer's understanding of O&M skills training and its potential benefits.

### 5.3.3 Outcomes Required for Payment

The O&M provider documents in descriptive terms the information required on the VR2894, Orientation and Mobility Assessment, including:

* the O&M specialist's observations and comments;
* recommendations for O&M skills training;
* the number of training hours recommended for each area of training and the total number of training hours recommended;
* the anticipated beginning and ending dates for the recommended training;
* the customer's response to the training recommendations;
* the height of the white cane that is most appropriate for the customer (using the measurement between the customer's chin and nose when the customer is standing up); and
* a description of all travel aids that the customer uses or would benefit from using.

## 5.4 Orientation and Mobility Training

### 5.4.1 Orientation and Mobility Training Service Description

O&M training prepares an individual who is blind or visually impaired to travel independently with competence and confidence.

Based on the results of the evaluation, the VR counselor or OIB worker determines the training goal and hours to be funded by VR or OIB. No training is provided before a service authorization is issued. Training is provided in person and cannot be conducted remotely.

All O&M training services for VR customers are conducted using:

* nonvisual (blindfold) techniques; and
* a rigid (non-folding) white cane with a metal tip.

All O&M training services for OIB customers are conducted using:

* either nonvisual (blindfold) or visual training, whichever better addresses the customer's needs and circumstances; and
* a rigid (non-folding) white cane with a metal tip, unless an alternate cane is needed.

The O&M specialist must discuss the benefits of nonvisual and visual training with each customer. Role modeling and peer support for nonvisual training are encouraged.

The O&M specialist may not conduct more than six hours or fewer than two hours of O&M instruction per day. The O&M specialist cannot conduct more than six hours of training in a day, even if multiple customers are served during that day. Billing for O&M services must not exceed six hours per day. Lessons are at least two hours long unless approved by an obtained VR3472, Contracted Service Modification Request for Blind and Visually Impaired Services.

For Independent Living Services for Older Individuals Who Are Blind (ILS-OIB) customers, the length of the training lesson will be determined by the customer’s health, stamina, and ability to participate.

### 5.4.2 Process and Procedure

#### 5.4.2.1 General

The VR counselor or OIB worker is responsible for authorizing O&M training for the customer and approving services, including approving the documentation for payment when invoiced.

The provider must not bill for any services other than Orientation and Mobility training, or Orientation and Mobility group training.

Based on the results of the assessment, the VR counselor or OIB worker determines the training goals and hours to be funded by VR or OIB. No training is provided before a service authorization is issued.

O&M training must not exceed the total number of training hours and type of training authorized by the customer's VR counselor or OIB worker on the service authorization.

Consistent and frequent scheduling is recommended to maximize learning. One two-hour lesson a week is the minimum training allowable. Daily O&M training is considered best practice.

**Note:** For OIB customers, if less than 2 hours of training were provided in one session, the trainer must document on the VR2896 in the Brief Description of how the training lesson affected the customer’s health, stamina, and ability to participate.

Time spent transporting customers does not count toward training time. O&M specialists are not reimbursed for time spent in the car, even when a customer is present.

The O&M specialist must notify the customer's VR counselor or OIB worker within 24 hours about all:

* missed, cancelled, or rescheduled appointments;
* issues, concerns, or circumstances that might impact or delay planned services; and
* incidents or injuries that occur during training that might negatively impact the customer's health and safety.

If services are interrupted and training cannot be completed as planned, or if services are postponed indefinitely because of unexpected circumstances, the O&M provider must notify the customer's VR counselor or OIB worker within 24 hours.

The O&M specialist must submit required forms and complete the required training under the specifications of the referral and the service authorization.

#### 5.4.2.2 Group Training

VR and OIB encourages O&M specialists to coordinate group training sessions (that is, sessions of up to three customers) when it will benefit the instruction process and better meet the needs of the customers.

The O&M specialist must get approval in writing from each customer's VR counselor or OIB worker before providing group training.

An O&M specialist:

* must not enroll more than 25 customers who are blind and visually impaired in active training; and
* must keep all relevant counselors, OIB workers, and assigned regional program specialist informed by email about the total number of customers in active training.

Active training—Any customer who is receiving an O&M assessment or is enrolled in O&M training is in active training.

#### 5.4.2.3 Travel Aids

The VR counselor or OIB worker purchases one rigid, long white cane with a metal tip and sleep shade (blindfold) for each customer who is approved to receive an O&M training.

The O&M specialist gives each customer information about how to purchase a white cane. Customers are responsible for replacing white canes and cane tips, buying backup white canes, and making similar purchases.

VR or OIB does not reimburse the O&M service provider for any items provided to a customer by the specialist.

The O&M specialist may recommend additional travel aids or other items to the customer's VR counselor or OIB worker, but the decision to purchase additional items rests solely with the VR counselor or OIB worker.

If a customer uses a guide dog, the customer is assessed by the O&M specialist to determine whether the customer also has proficient white cane skills. Once assessed, the customer may attend O&M training with either a white cane or a guide dog.

If customers need further assessment of and direct training for a guide dog, they must contact the school from which they obtained the dog.

### 5.4.3 Outcomes Required for Payment

The O&M specialist documents in descriptive terms each customer's monthly training progress and must include:

* the number of training hours provided in each training area;
* a detailed narrative on each skill area addressed during the reporting period and the training location for each lesson;
* a detailed explanation of anticipated training for the upcoming month;
* an explanation of deviations from assessment recommendations, if any; and
* a detailed narrative of cumulative progress, if training is complete.

Monthly progress reports, along with the invoice and any other required supporting documentation, must be submitted within 30 days from the end of each calendar month until the customer's O&M services are completed or services are no longer authorized by the customer's VR counselor or OIB worker.

## 5.5 Orientation and Mobility Service Fee

|  |  |  |
| --- | --- | --- |
| **O&M Services** | **Unit Rate** | **Comment** |
| O&M Assessment | $75.00 per hour | Limited to three hours per customer |
| O&M Training–Individualized | $75.00 per hour | * Training sessions must last at least two hours
* No more than six hours of training allowed per day

Note: For OIB customers, the length of the training lesson will be determined by the customer’s health, stamina, and ability to participate.  |
| O&M Training–Group | * $75.00 per hour for the first customer
* $37.50 per hour for each additional customer
 | * Limit of three customers per group
* Training sessions must last at least two hours
* No more than six hours of training allowed per day
 |