

## **PROCEDURE FOR INITIATING AN AT REFERRAL**

### **OVERVIEW:**

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This procedure is to define the process by which a Vocational Counselor (VC), Transition Counselor (TC), or a Career Pathway Navigator (CPN), refers a HireAbility case to an AT Specialist (ATS) and the resulting workflow and outputs they can expect. If the VC, TC or CPN is unsure if a case is appropriate or eligible for an AT referral, they should reach out to the AT Specialist servicing their office via email or phone.

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### **POLICY**

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AT Consultations require a referral. The steps needed are detailed below.

If a client has received a prior referral, a new referral may be requested if:

- the office serving the client has changed.
  - the Consultant servicing the office has changed.
  - substantial time has passed and the client's condition or goals have changed.
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### **PROCEDURE: PRE-REFERRAL**

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**Castleton Tryout Center covers: Barre, Morrisville, Middlebury, Rutland, Bennington**

VC or TC completes a 'Referral to AT' case note in AWARE.



State of Vermont  
Division of Vocational Rehabilitation

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1. VC or TC attaches release of information to Aware case record, located on [HireAbility's SharePoint](#). For "Agency or Individual Name" please put "AT Services at UVM (CDCI)".
2. VC or TC grants **Guest Access** (Update w/o Auth & Pay) to **AT Services Coordinator**; enter start date / do not enter end date.
3. For consumers in plan status, VC or TC adds '**Consult-VR (VATP) Assistive Tech Services**' to the Plan. (DO NOT choose a subcategory).
4. VC or TC e-mails **AT Services Coordinator** with referral request.
5. AT Consultants will supply the VC or TC with an intake referral form, (forms vary by consultants), to be completed and uploaded to AWARE attachments.

**White River Junction Tryout Center covers: St. Johnsbury, White River Junction, Springfield, Brattleboro**

**Burlington Tryout Center covers: Burlington**

**VCAP covers: Statewide VCAP referrals, St. Albans, and Newport**

1. VC or TC completes a 'Referral to AT' case note in AWARE.
2. VC or TC grants **Guest Access** (Update w/o Auth & Pay) to **AT Services Coordinator only**; enter start date / do not enter end date.
3. For consumers in plan status, VC, TC, or CPN adds '**Consult-VR (VATP) Assistive Tech Services**' to the Plan. (DO NOT choose a subcategory).
4. VC or TC e-mails **AT Services Coordinator** with referral request

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5. AT Consultants will supply the VC, TC, or CPN with an intake referral form, (forms vary by consultants), to be completed and uploaded to AWARE attachments.

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## **PROCEDURE: POST-REFERRAL**

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The following is an outline of what may occur post referral for an AT consultation. Not all steps will be followed in every case and each AT Consultant may vary somewhat in what they do.

1. AT Consultant will review case notes for important information and may reach out to the Counselor for additional details including best method for contacting, opinions of case, and potential dates for a consultation meeting, sometimes in coordination with the client. Counselors are encouraged to be present at the first meeting of consultant and client.
2. AT Consultant will contact the client, set expectations, and will schedule meeting with the client.
3. AT Consultant may add a case note of impressions of the case and initial ideas after meeting. They also may email the client with information on items including links which also may be attached to the case record in Aware as a Word document. (In general, AT Consultants will add a case note following substantial interactions with the client or when unable to reach the client repeatedly.)
4. AT Consultant may demonstrate and loan items of AT to the client. This may occur multiple times as the client tries various alternatives. (Ex. Alternative computer input devices to control an onscreen cursor. Client may need to try multiple items to find one that works best.)
5. Once the team including the client are agreed on next steps, they will write a report in Word format that lists suggested AT for the client, where it can be purchased with links, and approximate cost. This report will be attached to the case in Aware and usually emailed to both the client and the



- counselor. The AT Consultant can be available to review the report with the client.
6. AT Consultant will be available for follow-up questions, basic training, and other issues that may arise.
  7. Once the AT portion is completed to the Consultant and client's satisfaction, AT Consultant will add a case note indicating the AT portion is closed, will remove their guest access, and will alert the counselor.