STATE OF ARIZONA

REHABILITATION SERVICES ADMINISTRATION (RSA)

MANAGED SERVICE PROVIDER (MSP)

INFORMATION FOR ILOB STAFF

REHABILITATION INSTRUCTIONAL SERVICES
FOR BLIND AND VISUALLY IMPAIRED

February 2026

Agenda

- Introduction

- RSA/ILOB, MSP, CRP's Roles and Responsibilities

- MSP Process for ILOB RIS BVI

- Common Issues, Key Tips & Myths

- Need Help?

MSP Introduction

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- Knowledge Services is the Managed Service Provider (MSP)
- The MSP manages the Vendor (Community Rehabilitation Provider) networks for specific VR services
- The MSP has a total of 18 team members dedicated to serving the AZVRS MSP Program
- The terms MSP, Knowledge Services, Guidesoft, and AZVRS MSP Program are used interchangeably

RSA/ILOB, MSP & CRP
Roles and Responsibilities

Roles and Responsibilities

- RSA Administration (including RSA Contracts Unit, Program SMEs, Office of Procurement, etc.)

  - Develops and approves Service Specifications & associated forms
  - Establishes insurance requirements & vendor qualifications
  - Negotiates provider rates
  - Reviews and approves all service providers
  - Coordinates training, guidance, & workflow with Knowledge Services

- Knowledge Services

  - Subcontracts with approved vendor network
  - Processes referrals & authorizations, communicates with CRP's, RSA & ILOB staff, validates reporting documentation to facilitate invoicing
  - Provides guidance and assistance to RSA & ILOB staff and CRP network
  - Validates compliance for CRP network

Roles and Responsibilities cont.

- RSA/ILOB Staff:

  - Works with client to identify and plan services
  - Submits MSP New Client Referral Form
  - Assists client in choosing appropriate CRP/Vendor
  - Authorizes services per service specifications
  - Reviews CRP/Vendor reports/invoices and approves payments to CRP's/Vendors
  - Responds to inquiries from Knowledge Services Team and CRP's within forty-eight (48) hours

- Community Rehabilitation Provider (CRP/Vendor/Provider)

  - Subcontracted to provide specific services
  - Reviews referrals to confirm ability to provide services
  - Coordinates and provides authorized direct client services
  - Documents and submits through the MSP Reporting Packets
  - Communicates client case updates directly to RSA & ILOB Staff, requests changes to authorizations, etc.

NOTE: Guidance provided by Knowledge Services Team to RSA & ILOB staff and Vendors is per service specifications (already approved by RSA Administration)

MSP Process for ILOB RIS BVI

ILOB RIS BVI Services

SERVICE DOCUMENTATION consists of:

Service Specification
- Describes the service, requirements for service provision, timelines, reporting/billing requirements, etc.

Service-related forms (Exhibits)
- These are generally forms and reports that must be completed by the vendor during provision of the service

LOCATION

Documentation for services under the MSP can be found at the AZVRS State User Portal for RSA Staff
- https://programs.knowledgeservices.com/azvrs/azvrs_state_users/

Service Overview

Independent Living Older Blind (ILOB) Rehabilitation Instructional Services (RIS) for Blind and Visually Impaired (BVI) include a variety of instructional and rehabilitative services to assist the ILOB Clients in achieving their independent living goals and functioning more independently in the home and in the community. These services may be provided in either an individual or a group setting, and are provided to assess each client's rehabilitation related needs; to explore with the client assistive technology aids and devices; and to assist each client with acquiring, developing, and improving skills in areas such as community integration, environmental access and mobility, communication and/or activities of daily living; including learning the use of any assistive technology aids/devices selected to address the ILOB Client's unique needs.

The ILOB RIS BVI services in these specifications are focused upon ILOB Clients with a documented visual impairment that results in legal blindness or significant visual impairment.

Service Overview cont.

Independent Living Older Blind (ILOB) Rehabilitation Instructional Services (RIS) for Blind and Visually Impaired (BVI) includes:

- ILOB Assistive Technology (AT) Services;
- ILOB Adjustment to Disability (AD);
- ILOB Orientation and Mobility (O&M) Training;
- ILOB Communication Skills Training (CST); and
- ILOB Daily Living Skills Training (DLST).

Referral for Service - New Client Referral Form (NCRF)

Pre-Identified Vendor:

1. ILOB Staff completes NCRF
2. MSP posts service information (without Client PII) in VMS for identified CRP to confirm their availability
   - CRP's have three (3) business days to submit confirmation
3. ILOB Staff creates Purchase Request for pre-identified CRP once NCRF has been submitted to MSP
   - *Include all service areas/sub-services. If a sub-service is not currently planned/authorized, please include within Purchase Request with one (1) unit and note it is a hold if the Client needs that sub-service in the future.*

Open Referral (Non Pre-Identified Vendor):

1. ILOB Staff completes NCRF
2. MSP posts service information (without Client PII) in VMS for CRP's to confirm their availability
   - CRP's have three (3) business days to submit confirmation
3. MSP sends list of available CRP's via encrypted email to ILOB Staff.
   - ILOB Staff reviews the CRP list with the Client
   - Client may contact CRP's to determine compatibility
   - Client selects CRP
   - ILOB Staff creates Purchase Request for selected CRP
     - *Include all service areas/sub-services. If a sub-service is not currently planned/authorized, please include within Purchase Request with one (1) unit and note it is a hold if the Client needs that sub-service in the future.*

*NCRF is located on the **AZVRS State User Portal***

Creation of Authorization

4. If applicable, Supervisor approval is obtained prior to RSA Purchasing Unit providing final approval.

   • Supervisors and RSA Purchasing Unit have three (3) business days to approve each Purchase Request

5. Once final approval is obtained, RSA Purchasing Unit emails RSA Purchase Authorization directly to Knowledge Services at AZVRS@knowledgeservices.com and CC's ILOB Staff

6. Knowledge Services emails authorization and NCRF to selected CRP within one (1) business day

7. CRP receives authorization and NCRF

   • This is considered the CRP's clearance email to initiate service provision

8. ILOB Staff emails supporting documentation directly to CRP, if applicable, once CRP is cleared by Knowledge Services

If an authorization has not been issued for a NCRF within 15 business days, the NCRF will be cancelled

CRP Initiates Service Provision

9. CRP contacts ILOB Staff and Client to arrange Client Service Plan (CSP) meeting

   - Vendor is responsible for scheduling the CSP meeting with ILOB Staff and Client within seven (7) business days after receipt of an assignment from the MSP

10. CRP, ILOB Staff and Client meet to complete CSP

    - All three (3) parties must be present at CSP – Client, ILOB Staff and CRP

11. ILOB Staff may amend current authorization to change units and/or service dates (e.g., extend service dates or stop services), as needed, during service provision

    - Please note: If the Purchase Authorization does not include a service line for each of the five (5) service areas/sub-services, inFormed will not allow it to be added later. ILOB Staff will be required to generate a new authorization to replace previous authorization on file.

12. If applicable, amended authorization receives Supervisor Approval and/or RSA Purchasing Unit approval, RSA Purchasing Unit emails to MSP Program Team, MSP Program Team sends to CRP.

CRP Reporting and Invoicing

13. CRP proceeds to servicing the Client

- CRP is responsible for scheduling and performing evaluations <u>determined needed</u> within ten (10) business days following the CSP
- CRP is responsible for scheduling and participating in a Consultation Meeting with Client and ILOB Staff within ten (10) business days after completion of the evaluation to review results, recommendations, equipment needs, and discuss roles & responsibilities of each party
  - Consultation Meeting is <u>required</u> to take place
  - All three (3) parties must be present at Consultation Meeting – Client, ILOB Staff and CRP
- CRP is responsible for initiating training and instruction necessary for the Client to develop the skills stated in the agreed upon CSP within ten (10) business days after the Consultation Meeting

14. CRP submits complete and accurate Service Summary and Reporting Packet to MSP

- Reporting Packet is due within fifteen (15) calendar days following the end of each calendar month in which service was provided, or as referenced within the applicable Service Specifications

15. MSP reviews documentation within seven (7) calendar days and, if complete and accurate, enters into VMS for invoicing

16. Knowledge Services emails invoice and Reporting Packet to Arizona Industry for the Blind (AIB).

RSA Processing of Invoices and Reporting Documentation

17. AIB notifies VRC of invoice pending approval via ILOB Staff's inFormed Dashboard - Payment Request .

    - ILOB Staff to complete review and approval within three (3) business days of notification

18. ILOB Staff reviews report(s) and invoice(s) and approves (or denies) for payment on the Payment IRequest Form then select "Okay to Exit."

19. PPU reviews invoice and makes payment if accurate and complete

    - If errors are identified, PPU will notify the Purchasing Specialist to issue MSP Unable to Process Payment (UPP) Letter
    - Purchasing Specialist must email UPP letter directly to Knowledge Services at AZVRS@knowledgeservices.com

20. RSA issues check (warrant) to Knowledge Services

21. Knowledge Services remits payment to CRP

ILOB Staff New Client Referral Form Timeline

- Once ILOB Staff submits the MSP New Client Referral Form (NCRF) for Pre-Identified or Open referrals, RIS BVI authorizations are required to be issued and emailed to AZVRS@knowledgeservices.com within fifteen (15) business days

- Day One: Date the MSP NCRF was submitted to MSP

- Please note: Extensions will be allowed (for open referrals) if ILOB Staff have contacted the MSP and indicated steps are being taken to identify a CRP/generate an authorization

- MSP will email ILOB Staff on or after the 15th business day to notify ILOB Staff that the referral will be cancelled but can be reopened at anytime by submitting a new MSP NCRF

  - MSP will continue to follow up with ILOB Staff weekly for Pre-Identified referrals pending authorizations, and bi-weekly for Open referrals pending CRP selection and authorization

ILOB RIS BVI Equipment Request Process

To assist with ILOB Clients obtaining Assistive Technology (AT) Equipment timely under the AZVRS MSP Program:

1. CRP's are required to email AT Equipment Requests directly to the ILOB Staff

2. If approved, ILOB/RSA Staff will move forward with purchasing the AT Equipment internally

    - CRP's AT Equipment Requests are required to include the following information:
      - Client's Name
      - Type of Equipment
      - Shipping Address

3. The General AT Equipment Requested is still required to be documented by the CRP on the Monthly Progress Report.

NOTE: *ATEI is a separate State Contract which should **not** be utilized under the AZVRS MSP Program*

Common Issues, Key Tips & Myths

Common Issues, Key Tips & Myths

- Local vs Distant Rate
  - Authorization Pricing Tier should be issued based on the county the Client *resides*:
  - If the vendor has an office that is owned/leased/rented within the county the Client resides, the Local Rate should be utilized
  - If the vendor does not have an office that is owned/leased/rented within the county the Client resides, the Distant Rate should be utilized

- ILOB RIS BVI Authorizations
  - RSA recommends the following for ILOB RIS BVI authorizations:
    - All service areas/sub-services be authorized on the Purchase Authorization
    - If a sub-service is not currently planned/authorized, please include within the Purchase Request with one (1) unit and note it is a hold in case the Client needs that sub-service in the future
    - *If the Purchase Authorization does not include a service line for each of the five service areas/sub-services, inFormed will not allow it to be added later*

- Sending Authorizations to MSP
  - Once the MSP NCRF has been submitted, ILOB Staff creates Purchas Request and if applicable, Supervisor approval is obtained prior to RSA Purchasing Unit providing final approval. Once final approval is obtained, RSA Purchasing Unit emails RSA Purchase Authorization directly to Knowledge Services at AZVRS@knowledgeservices.com and CC's ILOB Staff.
  - Authorizations must be emailed directly from RSA Staff to AZVRS@knowledgeservices.com

- Expired ILOB RIS BVI Authorizations
  - If an authorization expires prior to an amendment being issued to extend the service end date, ILOB Staff is required to submit a new MSP New Client Referral Form and a new authorization is required to be generated

ILOB RIS BVI Purchase Authorization Example

Service Name: ILOB RIS BVI Assistive Technology (AT) Services

Procurement#: CTR075483

Service Information: Assistive Technology Services

Begin Date: 07/01/2025 **End Date:** 09/30/2025

Unit Type Description: ILOB RIS BVI Assistive Technology (AT) Services - Local (Maricopa, Pima)

Quantity: 10 **Unit:** Hour Unit Cost: $100.00 **Total Cost:** $1000.00

Service Name: ILOB RIS BVI Adjustment to Disability (AD)

Procurement#: CTR075483

Service Information: Adjustment to Disability

Begin Date: 07/01/2025 **End Date:** 09/30/2025

Unit Type Description: ILOB RIS BVI Adjustment to Disability (AD) - Local (Maricopa, Pima)

Quantity: 15 **Unit:** Hour Unit Cost: $100.00 **Total Cost:** $1500.00

Service Name: ILOB RIS BVI Orientation and Mobility (O&M) Training

Procurement#: CTR075483

Service Information: Orientation & Mobility Training

Begin Date: 07/29/2025 **End Date:** 09/30/2025

Unit Type Description: ILOB RIS BVI Orientation and Mobility (O&M) Training - Local (Maricopa, Pima)

Quantity: 10 **Unit:** Hour Unit Cost: $100.00 **Total Cost:** $1000.00

Service Name: ILOB RIS BVI Communication Skills Training (CST)

Procurement#: CTR075483

Service Information: *Hold only, no service authorized.*

Begin Date: 07/01/2025 **End Date:** 09/30/2025

Unit Type Description: ILOB RIS BVI Communication Skills Training (CST) - Local (Maricopa, Pima)

Quantity: 1 **Unit:** Hour Unit Cost: $100.00 **Total Cost:** $100.00

Service Name: ILOB RIS BVI Daily Living Skills Training (DLST)

Procurement#: CTR075483

Service Information: *Hold only, no service authorized.*

Begin Date: 07/01/2025 **End Date:** 09/30/2025

Unit Type Description: ILOB RIS BVI Daily Living Skills Training (DLST) - Local (Maricopa, Pima)

Quantity: 1 **Unit:** Hour Unit Cost: $100.00 **Total Cost:** $100.00

Total Authorized Amount: $3700.00

Common Issues, Key Tips & Myths cont.

- For Clients that have had an Evaluation deemed necessary (at CSP), a Consultation Meeting is required to be completed within ten (10) business days after completion of the Evaluation.
  - Client, ILOB Staff, and CRP must be present at the Consultation Meeting.

- CRP's can only complete Evaluations for service areas/sub-services authorized at time of service provision

- CRP's can only work on service areas/sub-services authorized at time of service provision

- Revised Client Service Plan (CSP)
  - If during service provision additional training areas or objectives are identified and/or changed, a revised CSP is required to be completed

Common Issues, Key Tips & Myths cont.

- CRP Feedback - Referrals:

  - More information is needed at time of referral for a CRP to truly confirm their ability to provide services.
    - Please avoid submitting referrals that are short, not descriptive, or including vague terms
  - Client Geography: landmark or intersection

- CRP Feedback - Client Service Plan (CSP):

  - Revised CSP is required if there are changes to the employment goal or service objectives previously agreed upon
  - Wet Signature/electronic signature/email approval from the Client, ILOB Staff, and CRP Representative are required to confirm the agreed upon service details

- CRP Feedback - Evaluation and Consultation Meeting:

  - CRP is required to schedule and perform within ten (10) business days following the Client Service Plan meeting the Evaluation(s) determined to be needed.
  - CRP is required to schedule and participate in a Consultation Meeting with the ILOB Client and the ILOB Staff within ten (10) business days after completion of the Evaluation in order to review the results of the evaluation(s), recommendations, equipment needs, and discuss the roles and responsibilities of the Vendor, ILOB Client, and ILOB Staff Member

Common Issues, Key Tips & Myths cont.

- Myth: CRP's cannot include their own supplementary documentation with a Reporting Packet.

    - CRP's are welcome to include supplementary documentation within their Reporting Packets. CRP's are simply instructed to include "see attached" on the State Exhibit in which the attachment is providing their response.

- Myth: CRP's do not have access to their monthly Reporting Packets once submitted to the MSP.

    - CRP's can access all Reporting Packets submitted through the VMS to obtain up to date information on pending corrections, invoices, and payments.

- Myth: CRP's cannot communicate directly to ILOB or RSA Staff outside of the MSP

    - MSP promotes communication and keeping relationships established between the CRP Community and ILOB & RSA Staff. The MSP only asks for authorizations and UPP's to be emailed directly to AZVRS@knoweldgeservices.com for processing.

Need Help?

Contact Knowledge Services

When to contact Knowledge Services?

- New RIS BVI Client Referral Requests

- Questions regarding CRP's

- Escalations

- Invoice Questions and/or UPP Notifications

For escalation assistance:

Mary Orantes Tamayo
Delivery Manager

(602) 842-4155

MaryO@knowledgeservices.com

Christina Kizzee
Delivery Manager

(602) 910-6107

ChristinaK@knowledgeservices.com

How to contact AZVRS MSP Program Team?

- Email: AZVRS@knowledgeservices.com

Samantha Villegas
Director, MSP - HHS Programs

(602) 698-0944

SamanthaV@knowledgeservices.com

Contact DERS/RSA/VR

DERS Contracts at DERSContractsAdmin@azdes.gov

- Contract-related questions (e.g., CRP/Service and Price Setup in inFormed, etc.)

RSA Contract Monitoring at RSAContractMonitors@azdes.gov

- CRP Deficiency form (when the issue with a CRP cannot be resolved through Knowledge Services)

RSA Policy at rsapolicyquestions@azdes.gov

- Policy related questions

RSA Purchasing Unit at rsapurchasing@azdes.gov

- Purchasing related questions and support

Thank you.