



**Vendor Training | Comp BVI**

*Comprehensive Disability Related Training Services  
for the Blind and Visually Impaired*

*AZVRS MSP Program*

*Presented: March 2026*



# Agenda

- Introduction
- Roles & Responsibilities
- Terminology & Forms
- Implementation & Change Management
  - Key Changes
- Process Overview
- Implementation Next Steps
- Contact Us

# Introduction

## Knowledge Services

- Knowledge Services (KS) is the Managed Service Provider (MSP)
- The MSP manages the Community Rehabilitation Provider (CRP)/Vendor Community for specific VR services
- Knowledge Services utilizes dotStaff™ and dotStaff™ Forms as our Vendor Management System (VMS)
- The MSP has a total of twenty (20) local team members dedicated to serving the AZVRS MSP Program
- The terms, MSP, Knowledge Services, Guidesoft, and AZVRS MSP Program are used interchangeably

# Roles and Responsibilities

## Under the AZVRS MSP Program

### RSA Administration

- RSA Contracts Unit, Program SME's, Office of Procurement, etc.
- Develops and approves Service Specifications and associated forms
- Establish insurance requirements and vendor qualifications
- Negotiates vendor rates and reviews and approves all service providers
- Coordinates training, guidance, and workflow with Knowledge Services

### Community Rehabilitation Provider (CRP)/Vendor

- Organizations subcontracted to provide specific VR Services
- Reviews referrals through VMS to confirm ability to provide services
- Coordinates and provides authorized Client services
- Responsible for documenting service provision and submitting Reporting Packets through MSP Program
- Responsible for communicating Client case updates directly to RSA Staff (including requests to amend authorizations)
- Requested to respond to inquiries from KS and RSA Staff within 48 hours

### RSA/VR Staff

- Works directly with Client to identify and plan VR services
- Initiates referral process by submitting MSP New Client Referral Form
- Assists Client with choosing appropriate Vendor to provide services
- Authorizes services, per Service Specifications
- Reviews Vendor reports/invoices and approves for payment
- Requested to respond to inquiries from KS and Vendor network within 48 hours

### Knowledge Services

- Subcontracts with approved Vendor network
- Processes referrals and authorizations
- Reviews and processes reporting packets (reporting documentation) to facilitate invoicing
- Validates compliance of Vendor network
- Provides guidance and assistance to RSA Staff and the Vendor network

# Terminology & Forms

## Comp BVI Vendor Training

- dotStaff™ Forms

- MSP New Client Referral Form
  - VRS Service Opportunities
  - Vendor Willing to Provide Services
  - Service Summary Form
- Clearance Notification/Clearance Email
  - RSA Purchase Authorization
    - Rates for Services
  - Vendor Representative/Personnel
  - Reporting Packet

- dotStaff™ Forms

- Exhibit Z2 - Comp BVI Assessment Report
- Exhibit Z3 - Comp BVI Client Service Plan
- Exhibit Z4 - Comp BVI Monthly Progress Report(s)
- Exhibit Z5 - Comp BVI Equipment Request & Verification Form
- Exhibit Z6 - Comp BVI VR Client In-State Travel Reimbursement Form
- Exhibit Z6a - Comp BVI Supported Education Checklist
- Exhibit Z6b - Comp BVI Career Exploration Summary
- Exhibit Z6c - Comp BVI Career Exploration Labor Market Summary
- Exhibit Z6d - Comp BVI Career Exploration Informational Interviewing
- Exhibit Z7 - Comp BVI Completion Report

# Implementation + Change Management

## Comp BVI Services Overview

Disability Related-Comp BVI consists of, at a minimum:

- A Comp BVI Assessment
  - Rehabilitation Instructional Services (RIS) Assessment
  - Assistive Technology (AT) Assessment

Rehabilitation Instructional Services (RIS), also referred to as “Core Blindness Training”:

- Adjustment to Disability (AD)
- Orientation and Mobility (O&M) Training
- Communications Skills Training (CST)
- Work-Related Living Skills Training (WRLST)

Assistive Technology (AT) Services:

- AT Product Exploration
- AT Training
  - Instruction in the Use of AT Products
- AT Support Services
  - Product set-up & installation
  - Troubleshooting
  - Cleaning
  - Maintenance

# Implementation + Change Management

## Additional Comp BVI Services Overview

### \*Educational Support Services, when offered and authorized:

- Supported Education
- Tutoring Services

### \*Employment Services, when offered and authorized:

- Career Exploration
- Job Readiness Training
  - Work Adjustment Training
  - Job Search Skills Development
  - Job Search Assistance, Job Placement and Retention

### Job Training, when offered and authorized:

- An RSA approved competency-based Job Training curriculum

### Emergency Support Services, if applicable:

- Medical treatment
- Transportation not covered by VR Client's insurance

\*Exception has been received for Vendors to provide Educational Support Services and all Employment Services prior to Client completing Core Blindness Training and prior to Client demonstrating a Skill Level of 3

# Implementation + Change Management

## Additional Comp BVI Services Overview

If a VR Client is receiving Comp BVI services through an Out of State Vendor, the following Services may be provided and reimbursed at the actual expense incurred through Supplemental Support Services:

- Comprehensive Clinical Low Vision Exam
- Vocational Assessment
- Psychological Counseling
- Psychiatry Exams
- Physical Therapy
- Transportation Reimbursement

If a VR Client is receiving Comp BVI services In-State and requires any of the following, these services will be provided *outside* of the Comp BVI Provider:

- Comprehensive Clinical Low Vision Exam
- Vocational Assessment
- Psychological Evaluation or Psychological therapies

# Implementation + Change Management

## Process Overview

### MSP New Client Referral Form: Pre-Identified Referral

1. VR Staff/VR Counselor and VR Client meet to determine if service is needed
2. If services are approved, VR Staff/VR Counselor submits MSP New Client Referral Form
3. MSP Program Team reviews and creates service opportunity in VMS for Vendor Review
4. Vendor reviews and submits their confirmation of ability to provide services in VMS
  - Vendor has three (3) business days to review and submit confirmation in VMS

### MSP New Client Referral Form: Open Referral

1. VR Staff/VR Counselor and VR Client meet to determine if service is needed
2. If services are approved, VR Staff/VR Counselor submits MSP New Client Referral Form
3. MSP Program Team reviews and creates service opportunity in VMS for Vendor Network Review
4. Vendors review and submits their confirmation of ability to provide services in VMS
  - Vendor has three (3) business days to review and submit confirmation in VMS
  - MSP verifies the Vendors who confirmed their ability to provide services and sends the list of available Vendors to VR Staff/VR Counselor in an encrypted email
  - VR Staff/VR Counselor reviews the Vendor List with the VR Client
  - VR Client may contact Vendors to determine compatibility
  - VR Client selects Vendor and VR Staff/VR Counselor notifies MSP

# Implementation + Change Management

## Process Overview

5. VR Staff/VR Counselor creates Purchase Request for selected Vendor
6. If applicable, Supervisor approval is obtained prior to RSA Purchasing Unit providing final approval
  - Supervisors and RSA Purchasing Unit both have three (3) business days to approve each Purchase Request
7. Once final approval is obtained, RSA Purchasing Unit will email the RSA Purchase Authorization directly to Knowledge Services, CC'ing the VR Staff/VR Counselor
8. Once received, Knowledge Services will send the selected Vendor the official “clearance email” or “clearance notification”, which includes the full New Client Referral Form and Purchase Authorization, to initiate services
  - If Vendor requires additional supporting documentation, VR Staff/VR Counselor will email the supporting documents directly to Vendor once cleared by MSP
  - If Interpreting Services are required, please provide a quote from the interpreting services agency to VR Staff/VR Counselor for review and approval. Interpreting reimbursement is required to be pre-approved and authorized prior to services being provided
  - Reminder: *Verbal authorizations are not valid*

# Implementation + Change Management

## Process Overview

9. Vendor contacts VR Client (or VR Client's Guardian/Representative) within seven (7) business days of receiving the clearance notification to schedule the Comp BVI Assessment

- Please discuss with VR Staff if travel arrangements are needed to allow VR Staff/VR Counselor to authorize travel reimbursement timely
- Complete Exhibit Z2 - Comp BVI Assessment Report to document results of the Assessment
- Complete Exhibit Z5 - Comp BVI Equipment Request and Verification Form to document recommendations for AT and Low Vision Products, equipment, and software configuration to best meet VR Client's specific needs

10. Within ten (10) business days of completing the Comp BVI Assessment, schedule and conduct the Consultation Meeting to discuss results and recommendations between the VR Client, VR Staff/VR Counselor, and Vendor

- All three (3) parties are required to be in attendance – VR Client, VR Staff/VR Counselor, and Vendor
- VR Staff/VR Counselor approval *is* required to be obtained on the Assessment Report - Please obtain either a physical signature on the completed exhibit, an electronic signature, or an approval email from the VR Staff/VR Counselor

11. During the Consultation Meeting, conduct the Client Service Plan Meeting and complete Exhibit Z3 - Comp BVI Client Service Plan to document the agreed upon Comp BVI services and service objectives that will be worked on

- VR Staff/VR Counselor approval *is* required to be obtained on the Client Service Plan (CSP) - Please obtain either a physical signature on the completed exhibit, an electronic signature, or an approval email from the VR Staff/VR Counselor
- A revised Client Service Plan is required if service objectives change during service provision

# Implementation + Change Management

## Process Overview

12. Vendor will proceed to providing authorized services to the VR Client within ten (10) business days after completing the Client Service Plan

- Vendors must schedule monthly meetings with VR Staff and VR Client to discuss the VR Client's progress towards achieving the established service objectives and/or acquired skills

13. As needed during service provision, VR Staff/VR Counselor may amend the Purchase Authorization to change units, service dates, or add training areas and reimbursements

14. Amended Purchase Authorizations will receive internal approvals, as needed, and will be emailed by the RSA Purchasing Unit to Knowledge Services.

15. Knowledge Services will email each amended Purchase Authorization to the Vendor to continue providing services to the VR Client

16. Vendor completes the applicable electronic Exhibits to document the services provided for each VR Client during the reporting month

17. Vendor consolidates all applicable completed electronic Exhibits into a single Reporting Packet

# Implementation + Change Management

## Process Overview

18. Vendor submits each Reporting Packet through the electronic Service Summary to the MSP for review and processing

- Reporting packets are due within fifteen (15) calendar days following the end of each calendar month in which services were provided, or as referenced within the Service Specifications

19. MSP reviews Service Summary submission and Reporting Packet within seven (7) calendar days

- If complete and accurate, Knowledge Services will generate an invoice
- If corrections are required, Knowledge Services will email the Service Summary Submitter to request the specific corrections are completed

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

21. AIB uploads the Reporting Packet into the ECF and attaches the invoice to the authorization within five (5) business days of receipt from MSP

22. AIB notifies VR Staff/VR Counselor of invoice pending approval via inFormed Dashboard – Payment Request.

- VR Staff/VR Counselor to complete review and approval within three (3) business days of notification from AIB

23. VR Staff/VR Counselor reviews Reporting Packet and invoice and approves (or denies) payment request

# Implementation + Change Management

## Process Overview

24. Payment Processing Unit (PPU) reviews invoice approval from VR Staff and initiates payment

- If errors are identified by PPU, PPU will notify the Purchasing Specialist to issue a MSP Unable to Process Payment (UPP) Letter
- Purchasing Specialist will email the UPP Letter directly to Knowledge Services
- Knowledge Services will work with the Vendor to resolve the issues identifies for payment to be remitted

25. RSA issues check (warrant) to Knowledge Services

26. Once received, Knowledge Services remits payment to the Vendor

# Implementation + Change Management

## Purchase Authorizations

Each service, if applicable and authorized, will be a separate service line:

- Residential Day
- Comp BVI Assessment
- Rehabilitation Instructional Services (RIS)
  - Consolidated into a single bucket of hours for AD, O&M, CST, & WRLST
- Assistive Technology (AT) Services
- Educational Support Services
- Employment Services
- Job Training
- Emergency Support Service Reimbursement
- AT and Low Vision Product Reimbursement\*
  - Exhibit Z5 - Comp BVI Equipment Request and Verification Form
- VR Client In-State Travel Reimbursement\*
  - Exhibit Z6 - Comp BVI VR Client In-State Travel Reimbursement Form
- Supplemental Support Services\*
- Interpreting Services Reimbursement\*
  - Vendors are responsible for notifying RSA when an interpreter is required and provide service only after an amended Purchase Authorization has been issued. Reimbursement for the use of interpreters for ASL or foreign language(s) shall be made at the actual expenses incurred and upon submission of verifying documentation with the invoice

\*Services are required to be pre-approved and authorized on Purchase Authorization prior to invoicing

# Implementation + Change Management

## Vendor Expectations

Vendors may only provide services after receiving the written authorization from inFormed through the MSP

- Verbal authorizations are not valid

Comp BVI Assessments must be scheduled with the VR Clients within seven (7) business days after receipt of an assignment from the MSP

- Vendor should discuss travel arrangements for the VR Client, if applicable, with VR Staff/VR Counselor and VR Client's Guardian/Representative to participate in the Comp BVI Assessment

Consultation Meeting must be scheduled and conducted within ten (10) business days of completing the Comp BVI Assessment to discuss results and recommendations from the Comp BVI Assessment

- All required parties must attend: VR Client, VR Staff/VR Counselor and Vendor
- During Consultation Meeting, the Client Service Plan will be completed

Vendor will document recommendations for AT and Low Vision products, equipment, and/or software configuration to best meet the VR Client's specific needs on the Comp BVI Equipment Request and Verification Form

- Vendor will submit the completed Exhibit Z2 - Comp BVI Assessment Report along with Exhibit Z5 - Comp BVI Equipment Request and Verification Form for VR Staff/VR Counselor to approve or disapprove the recommended products/equipment/software
- Once the AT and Low Vision products/equipment/software have been purchased by the Vendor and received by the VR Client, Vendor will complete and return Exhibit Z5 - Comp BVI Equipment Request and Verification Form, to document the hardware/software/serial/model numbers, and warranty expiration date

# Implementation + Change Management

## Vendor Expectations

Client Service Plan (CSP) Meeting is required to take place and the CSP must be completed and agreed to by the VR Client, VR Staff/VR Counselor, and Vendor before Core Blindness Training can begin

- A revised Client Service Plan is required if service objectives change during service provision

Vendors must schedule monthly meetings with VR Staff/VR Counselor and VR Client to discuss the VR Client's progress towards the achievement of the established service objectives and/or acquired skills

Vendors must notify the VR Staff/VR Counselor and MSP:

- Through email documentation within one (1) business day when the VR Client fails to participate in services and one (1) unsuccessful attempt has been made to contact the VR Client
- Through email documentation within one (1) business day if the VR Client is encountering serious difficulties and problems that interfere with successful completion of the agreed upon objective(s)

Vendors are responsible for notifying RSA when an interpreter is required and provide service only after an amended Purchase Authorization has been issued.

- Reimbursement for the use of interpreters for American Sign Language (ASL) or foreign language(s) shall be made at the actual expenses incurred and upon submission of verifying documentation with the invoice.

# Implementation + Change Management

## Billing/Payment Expectations

Vendor shall bill only for time spent providing Comp BVI services that last longer than fifteen (15) minutes

- With VR Clients face-to-face, by video conference, or by phone calls; and
- With VR Counselors face-to-face, by video conference, or by phone calls to discuss specific issues pertaining to VR Clients.

VR Client In-State Travel Reimbursement: Transportation of a VR Client from the Vendor facility to a service-related appointment or work site by Vendor personnel, who remain to provide direct Client services, must be pre-approved by the VR Counselor, and must utilize the State of Arizona Accounting Manual (SAAM), and include supporting documentation to validate the travel

Multiple Comp BVI service activities that are provided during a single date of service that lasts less than fifteen (15) minutes may not be combined.

- i.e., Same date of service - one (1) phone call with the VR Client to discuss service provision, lasting five (5) minutes and one (1) phone call with the VR Staff/VR Counselor to discuss challenges the VR Client is encountering lasting ten (10) minutes, cannot be combined

Assistive Technology and Low Vision Product Reimbursement: The Vendor shall be reimbursed for the actual costs incurred after receipt of approval through an amended RSA Purchase Authorization and purchase of the goods and services for the VR Client.

# Implementation + Change Management

## Vendor Performance Standards

Performance Standard #1 - Acceptance Rate: At a minimum, eighty percent (80%) of VR Clients referred to the Vendor shall be accepted for services.

Performance Standard #2 - Completion Rate: At a minimum, ninety percent (90%) of VR Clients who were accepted by the Vendor and participate in the program shall successfully complete the objectives identified for Core Blindness Training and shall acquire and demonstrate Skill Level 3 for each training area agreed upon in the Client Service Plan.

1. VR Clients who drop out of the program due to the dissatisfaction with the quality of the Vendor's service provision are included in the Performance Standard. This does not include dissatisfaction with the Vendor's instructional method or philosophy.
2. VR Clients who drop out due to personal reasons, other than dissatisfaction with the Vendor's service provision (e.g., medical reasons, incarceration, closure by VR Counselor, or other reasons that cannot be attributed to the quality of the Vendor's service provision, etc.) are not included in Performance Standard #2

# Implementation + Change Management

## Vendor Performance Standards

Performance Standard #3 - Completion Rate: At a minimum, fifty-five percent (55%) of the VR Clients accepted by the Vendor, and who have successfully completed Employment Services, shall secure a job placement and remain employed for at least ninety (90) days, in alignment with the specified VR Client Vocational Goal identified in the agreed upon Client Service Plan.

1. VR Clients who drop out of the program due to their dissatisfaction with the quality of the Vendor's service provision will be counted towards this Performance Standard;
2. VR Clients who drop out due to personal reasons, other than dissatisfaction with the Vendor's service provision (e.g., medical reasons, incarceration, closure by VR Counselor, or other reasons that cannot be attributed to the quality of the Vendor's service provision, etc.) will not be counted towards this Performance Standard;
3. VR Clients who only complete Career Exploration or Work Adjustment Training will not be counted towards this Performance Standard; and
4. Short Term Job Supports services will not be included when calculating Performance Standard #3.

Performance Standard #4 - Reporting: The Vendor shall submit no less than ninety percent (90%) of their initial Reporting Packets completely and accurately, as defined by the MSP, by the established timelines identified within these Service Specifications.

# Implementation + Change Management

## Electronic Exhibit Review

### Comp BVI Program Page

- [Exhibit Z - Comp BVI Service Specifications](#)
- [Exhibit Z1 - Comp BVI WAT Appraisal Guide](#)
- [Exhibit Z2 - Comp BVI Assessment Report](#)
- [Exhibit Z3 - Comp BVI Client Service Plan](#)
- [Exhibit Z4 - Comp BVI Monthly Progress Report](#)
- [Exhibit Z5 - Comp BVI Equipment Request and Verification Form](#)
- [Exhibit Z6 - Comp BVI In-State Travel Reimbursement Form](#)
- [Exhibit Z7 - Comp BVI Service Completion Report](#)

### Service Summary Form

- [Service Summary Form - Contract #CTR075483](#)

### Supported Education specific:

- [Exhibit Z6a - Comp BVI Supported Education Checklist](#)

### Career Exploration specific:

- [Exhibit Z6b - Comp BVI Career Exploration Summary](#)
- [Exhibit Z6c - Comp BVI Career Exploration Labor Market Summary](#)
- [Exhibit Z6d - Comp BVI Career Exploration Informational Interviewing](#)

# Implementation + Change Management

## Next Steps

### Vendor Management System (VMS) Set Up

- Identify who from your team should access VMS to complete Exhibits
- Create dotStaff User Accounts for these individuals
  - [Get Started Guide](#)
- Provide [AZVRS@knowledgeservices.com](mailto:AZVRS@knowledgeservices.com) with the name(s) and email address of the individuals who will need access to the electronic Exhibits by **March 23, 2026**

### Vendor Code of Conduct

- Vendor Representatives providing direct client services are required to have a signed Vendor Code of Conduct within their personnel file with your organization

### Register with Arizona Centralized Background Checks (CBC) Portal -

#### Employer Account

1. Please create an Employer Account (Knowledge Services, DERS, and other ADES Divisions will be participating as Agency Accounts).
2. Once you have created your Employer Account, please link your account to Knowledge Services/add connection to your account with Knowledge Services ([AZVRS@knowledgeservices.com](mailto:AZVRS@knowledgeservices.com)) and DERS Contracts Team ([derscentralregistrychecks@azdes.gov](mailto:derscentralregistrychecks@azdes.gov))

#### Vendor Personnel Register with CBC Portal - Individual/Personal Account

1. Create an Individual/Personal Account
2. Select background check that is needed as “Employment”
3. Complete Employment Background Check Request
  - Department of Child Safety (DCS) Checks and Adult Protective Services (APS) Checks are required
  - Include the following solicitation/contract number/provider id: CTR075483

# Implementation + Change Management

## Next Steps

### VRS Vendor Profile

- Submit a [VRS Vendor Profile](#) in order to provide VR Clients with the capabilities and contact information of your organization,
- Please indicate which email address should be utilized for Authorizations to be sent, and if there are additional Points of Contact for your company that the MSP can utilize for communications (outside of clearance emails and authorizations)

### Vendor Personnel Compliance Form

- Vendor Personnel Compliance Form will be ready for each Vendor to complete for incumbent Vendor Representatives the week of *March 30<sup>th</sup>, 2026*.
- Please submit one (1) Vendor Personnel Compliance Form, per incumbent Vendor Representative, affirming the qualifications they meet to provide Comp BVI Services by **May 1<sup>st</sup>, 2026**.

\*CBC Background Check *and* Vendor Personnel Compliance Form submission are both due by May 1<sup>st</sup>, 2026 for each Incumbent Vendor Representatives

### Incumbent Comp BVI Client Tracking

- Please provide a list of your current Comp BVI Clients to [AZVRS@knowledgeservices.com](mailto:AZVRS@knowledgeservices.com) by **Friday, March 20<sup>th</sup>, 2026** to assist the MSP with ensuring authorizations are in place for April 1st, 2026

### RSA to begin generating Comp BVI authorizations for Incumbent Clients

- VR Staff/VR Counselor were notified on 3/4/2026 that they can now beginning “planning” Comp BVI Services beginning 4/1/2026
- As Knowledge Services begins to receive incumbent authorizations, KS will process to each Vendor in the order they are received

# Contact Us

## AZVRS MSP Program Team

### When to engage with the MSP:

- New Client identified outside of the MSP
- Questions regarding Vendor Personnel Compliance status
- Authorizations received outside of the MSP
- Questions regarding Program Processes
- Invoice, UPP's, or payment questions
- Escalation assistance

### How to contact the MSP:

- Sharedbox: [AZVRS@knowledgeservices.com](mailto:AZVRS@knowledgeservices.com)

### Escalation assistance:

- Referrals, Authorizations, etc.:
  - Mary Orantes Tamayo - Delivery Manager - 602.842.4155 - [MaryO@knowledgeservices.com](mailto:MaryO@knowledgeservices.com)
- Reporting Packets, Invoices/Billing, etc.:
  - Christina Kizzee - Delivery Manager - 602.910.6107 - [ChristinaK@knowledgeservices.com](mailto:ChristinaK@knowledgeservices.com)
- For additional escalation assistance:
  - Samantha Villegas - Director HHS/VRS - 602-698-0944 - [SamanthaV@knowledgeservices.com](mailto:SamanthaV@knowledgeservices.com)

**Questions  
+  
Discussion**

