



knowledge services

STATE OF ARIZONA
REHABILITATION SERVICES ADMINISTRATION (RSA)
MANAGED SERVICE PROVIDER (MSP)
VISION SERVICES
PROGRAM TRAINING

September 2021

Agenda

- Introductions
- RSA Initiative Overview and Objectives
- Knowledge Services Overview
- Industry Definitions
- Process Overview
- Vendor Code of Conduct
- Vendor Personnel Compliance
- Vendor Performance Standards
- Service Specifications
- Next Steps

■ RSA Initiative Overview and Objectives

The VR program procured a contract for a Managed Service Provider (MSP) to provide various disability related services to VR Clients. The ongoing implementation of WIOA has required VR programs to think differently about how services are provided to VR Clients and expand the capability to serve individuals with the most significant disabilities.

■ RSA Initiative Overview and Objectives

Several methods of procurement were considered and the concept of a Managed Service Provider (MSP) resonated as a solution that would help meet several key outcomes:

- Provide an option to have the continuous opportunity to add to the network of service providers in order to best serve the needs of VR Clients across the state.
- Provide transparency in the selection of service providers and ensure VR Client informed choice throughout the selection of service providers.
- Reduce VR Counselor administrative time researching and arranging for available service providers.
- Contract consolidation.

About Knowledge Services

Serving those who serve others

- Founded in 1994 - Certified WBE
- Workforce Management Experts
 - Managed Service Provider (MSP)
 - Vendor Management System (VMS) – dotStaff™
 - Employer of Record (EOR) / Payrolling
 - Managed Programs
 - Staffing / Recruiting
- Proven MSP Program Expertise
 - 50 enterprise-wide programs in Government, Healthcare, Banking / Finance, Retail, Food Services, Entertainment
 - MSP for State of Indiana, Maine, Arizona, Tennessee, Florida, Utah, Ohio, Mississippi, Missouri, Nevada, North Dakota, & Rhode Island
 - All Labor Categories including Statement of Work
 - Gig Workforce



■ Industry Definitions

- As the **Managed Service Provider (MSP)**, Knowledge Services takes on primary responsibilities for managing an organization's project service deliverables and vendors.
- dotStaff™ is Knowledge Services' **Vendor Management System (VMS)** which is an internet-enabled project sourcing, milestone and invoicing application that enables us to procure and manage a wide range of projects and services in accordance with the organization's processes and rules.

Terminology

- Guidesoft Inc., dba Knowledge Services
- MSP
- dotStaff™/VMS
- Posting/Bid
- Vendor: Representative / Personnel
- MSA
- MSP New Client Referral Form
- Electronic Service Summary
- Vision Services RSA Fee Schedule
- Vision Services Basic Eye Evaluation Approval Request Form
- Vision Services Basic Eye Evaluation Final Report
- Vision Services Comprehensive Eye Evaluation Approval Request Form
- Vision Services Comprehensive Eye Evaluation Final Report
- Vision Services Comprehensive Clinical Low Vision Evaluation Approval Request Form
- Vision Services Comprehensive Clinical Low Vision Evaluation Final Report

■ Vendor Community Engaging the MSP

When to engage the MSP?

- New VR Clients
- Escalation
- Questions regarding Vendor/Vendor Personnel
- Authorizations received outside of the MSP Program Team
- Invoice and/or payment questions

How to engage the MSP?

- Call the MSP Program Team
- Email the MSP Program Team

■ MSP New Client Referral Process

1. VR Counselor and VR Client meet
 - Meeting is to determine if service is needed
2. If services are approved, VR Counselor submits MSP New Client Referral Form to MSP Program Team
3. MSP Program Team creates posting in dotStaff™ to send to appropriate Vendors
4. Vendors submit confirmation of ability to service VR Client in dotStaff™
 - Vendors have three (3) business days to submit confirmation in dotStaff™

■ Knowledge Services Coordination with Vendor Network

5. MSP Program Team provides VR Counselor with list of Vendors who can service VR Client
6. VR Counselor reviews Vendor list with VR Client
7. If applicable, VR Client contacts Vendors to determine compatibility
8. VR Client selects Vendor
9. VR Counselor creates or amends Individualized Plan for Employment (IPE) with Vision as a service

■ Vendor Selection and Creation of Authorization

10. VR Counselor tasks Purchasing Tech (PT) to create an authorization in LIBERA

- No verbal authorizations allowed

11. PT creates authorization in LIBERA

- One (1) unique authorization will be issued for: Eye Exam
- One (1) unique authorization will be issued for: Eyewear and Optical Devices

12. PT emails authorization to MSP Program Team, MSP Program Team emails authorization and MSP New Client Referral Form to selected Vendor

- If applicable, VR Counselor will email additional supporting documentation to Vendor directly, once authorization has been sent to Vendor from MSP Program Team

13. MSP Program Team accepts the selected Vendor in dotStaff™

■ Vendor Selection and Creation of Authorization (cont.)

14. Vendor contacts VR Client to schedule the Eye Exam appointment

- Vendor is responsible for scheduling the Eye Exam appointment with VR Client within seven (7) business days after receipt of an assignment from the MSP

15. Vendor and VR Client meet to complete the Eye Exam

- Authorization will reflect the type of Eye Exam authorized:
 - Basic Eye Exam
 - Comprehensive Eye Exam
 - Comprehensive Clinical Low Vision Exam

16. If applicable, VR Counselor tasks PT to amend current authorization for change in units, change in dates, additional services line or cancellation of services in LIBERA

17. If applicable, PT creates amended authorization in LIBERA and send to MSP Program Team, MSP Program Team sends to Vendor

■ Vendor Service and Invoicing Process

18. Vendor submits complete and accurate electronic Service Summary, Basic Eye Evaluation Approval Request Form, Comprehensive Eye Evaluation Approval Request Form, or Comprehensive Clinical Low Vision Evaluation Approval Request Form (forms applicable to each VR Client) to MSP Program Team
 - Only one (1) complete/accurate electronic Service Summary and one (1) PDF monthly Reporting Packet per authorization per calendar month
 - Service Summary and monthly Reporting Packet must be submitted within seven (7) business days after completion of the Eye Exam
 - Reporting Packet to include itemized list of the recommended Vision Services (Eyewear and Optical Devices) identified by V, CPT, or G Code (as stated in the Vision Services RSA Fee Schedule) and the payment rate(s).
19. MSP Program Team reviews documentation and enters to dotStaff™ for invoicing
20. MSP Program Team sends invoice and Reporting Packet to AIB
21. Based upon Eye Exam Approval Request Form, VR Counselor will authorize Eyewear and Optical Devices

■ Vendor Service and Invoicing Process

22. If the VR Counselor approves the purchase of the Eyewear and/or Optical Devices recommended within the Approval Request Form, a second authorization will be generated authorizing services.
23. PT emails authorization to MSP Program Team, MSP Program Team emails authorization to Vendor
 - If applicable, VR Counselor will email supporting documentation to Vendor directly, once authorization has been sent to Vendor from MSP Program Team
24. Vendor contacts VR Client to schedule the Eyewear and Optical Devices appointment to provide fitting of glasses/contact lenses or training in the use of other optical devices
 - Vendor is responsible for scheduling the appointment with VR Client within seven (7) business days upon receipt of the authorization through the MSP

■ Vendor Service and Invoicing Process

25. Vendor submits complete and accurate electronic Service Summary, Basic Eye Evaluation Final Report, Comprehensive Eye Evaluation Final Report, or Clinical Low Vision Evaluation Final Report (forms applicable to each VR Client) to MSP Program Team
 - Service Summary and monthly Reporting Packet must be submitted within seven (7) business days after completion of the Vision Services
26. MSP Program Team reviews documentation and enters to dotStaff™ for invoicing
27. MSP Program Team sends invoice and Reporting Packet to AIB

■ Vendor Service and Invoicing Process (cont.)

28. AIB receives and processes required report(s) into ECF and invoice(s) into authorization in LIBERA

29. AIB tasks VR Counselor to review invoice in LIBERA

30. VR Counselor reviews required report(s) and invoice(s) and approves for payment in LIBERA

31. VR Counselor acknowledges task as complete in LIBERA and enters ready-for-payment date on authorization in LIBERA

32. State remits payment to Knowledge Services

33. Knowledge Services remits payment to Vendor

■ Vendor Code of Conduct

- Requirements found in the Vendor Code of Conduct detail the appropriate professionalism and customer service expectations for Vendor Personnel providing services under the MSP Program.
- Vendor Companies providing services under the MSP Program are required to submit a signed Code of Conduct, to verify each company understands the Code of Conduct requirements.
- Vendors are required to have a signed copy in the personnel file of all Personnel (currently active and future new hires) of the Code of Conduct prior to being cleared to provide services under the MSP Program.
 - Please keep the signed copy in your personnel files to be available upon request by RSA or Knowledge Services

■ Vendor Personnel Compliance

[Vendor Personnel Compliance Form](#)

- One form to provide the following:
 - Central Registry
 - Fingerprint Clearance Card
 - E-Verify
 - Affirmation of Qualifications
- Vendors are responsible for all vetting of personnel and maintaining documentation
 - Documentation for Vendor personnel can be requested at any time by RSA or Knowledge Services

■ Process for Adding New Personnel

1. Vendor completes [Vendor Personnel Compliance Form](#) found on the Vendor Portal
 - MSP Program Team provides completed form to DERS Central Registry
 - MSP conducted FPCC check
2. MSP Program Team emails DERS Central Registry Results to Vendor
3. Vendor Personnel signs Exhibit C – Vendor Code of Conduct
 - Vendors are required to have a signed copy in the personnel file of all Personnel prior to being cleared to provide services under the MSP Program
4. MSP Program Team sends Clearance Email to Vendor, clearing Vendor Personnel to begin working with VR Clients for the identified service(s)

■ Vendor Performance Standards

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

Performance Standard #2 (Submission of Examination): The Vendor will issue a complete and accurate Vision Services Basic Eye Evaluation Approval Request Form (Exhibit P2), Vision Services Comprehensive Eye Evaluation Approval Request Form (Exhibit P4), or Vision Services Comprehensive Clinical Low Vision Evaluation Approval Request Form (Exhibit P6), which includes an itemized list of the recommended vision services identified by V, CPT or G Code stated in the Vision Services RSA Fee Schedule (Exhibit P1) and the payment rate(s) for ninety percent (90%) of VR Clients for which authorizations are received;

■ Vendor Performance Standards (cont.)

Performance Standard #3 (Completion Rate): At a minimum, ninety-five percent (95%) of the Vision Services Basic Eye Evaluation Final Report (Exhibit P3), Vision Services Comprehensive Eye Evaluation Final Report (Exhibit P5), or the Vision Services Comprehensive Clinical Low Vision Evaluation Final Report (Exhibit P7) shall be submitted by the Vendor within seven (7) business days after completion of the Vision Services provided.

- 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.
- 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; and

Performance Standard #4 (Reporting): At a minimum, ninety percent (90%) of the initial Reporting Packets submitted through the MSP's program will be complete and accurate as defined by the MSP.

■ Service Specifications – Reporting Misconduct

5.3 *Submit to the MSP and the referring VR Counselor:*

5.3.1 A notification of any unusual incident verbally within one (1) business day of the occurrence, followed by a thorough written report of the unusual incident within three (3) business days of the occurrence. Unusual incidents include, but are not limited to:

1. Death of a VR Client;
2. Alleged neglect, abuse, mistreatment or exploitation of a VR Client (by anyone);
3. Disappearance of a VR Client. The Vendor shall report a missing client to law enforcement officials and ADES/RSA as soon as the Vendor suspects that the client may be missing;
4. Suicide attempt(s) by the VR Client;
5. Sexual abuse against a VR Client, including consensual sexual activity;
6. Inappropriate sexual behavior toward a VR Client;
7. Any threat to the physical or emotional well-being of an individual or Vendor's staff member by a VR Client, and
8. Any unexplained VR Client absence

■ Process Timeline Reminders

- Vendors have 3 business days to confirm their ability to provide service in dotStaff™
 - Pre-Identified and Non Pre-Identified
 - Once the dotStaff™ bid has been submitted and the MSP Program Team has received the authorization from RSA, MSP Program Team will send both the MSP New Client Referral Form and Authorization to the Vendor clearing Vendor to schedule the Eye Exam appointment
- Vision Services Reporting Packets are due to the MSP Program Team within seven (7) business days after completion of Vision Services as one (1) PDF Reporting Packet
 - Vendors should *not* send the Monthly Reporting Packet or Supporting Documentation directly to AIB or VR Counselors
 - Once approved by the MSP Program Team, a milestone is entered into dotStaff™ which will generate an invoice
 - Vendor's can access dotStaff™ → View Milestones to obtain updates on each invoice status

■ Common Questions

- Where can I find the Exhibits to utilize within each Monthly Reporting Packet?
 - All Vision Services Exhibits can be found on the [Vision Services Vendor Page](#)
- Will I be able to maintain a relationship with VR Counselors?
 - Yes, but please note the following:
 - Authorizations must be sent to Vendors directly from the MSP Program Team (verbal authorizations are not valid)
 - No monthly Reporting Packets should be sent outside of the MSP Program Team
- What happens to my existing VR Clients?
 - All incumbent VR Clients receiving services today will continue to receive the current services being provided, as authorized by RSA.
 - New authorizations will be issued under the MSP Program

■ AZVRS MSP Vendor Website

[Vendor Registration and Information Portal](#)

Site includes:

- Master Services Agreement
- Required Certificate of Insurance (COI) information
- W-9 Form
- Vendor Information and Authorization Routing Form
- Service Summary, Service Specifications, and Exhibits
- Vendor Personnel Compliance Form
- Vendor Code of Conduct
- dotStaff™ Vendor Guide
- MSP Program FAQ
- Training Presentations

■ Next Steps

1. Vendor's sign MSA with Knowledge Services - *If not previously completed.*
2. Vendor's train each Vendor Representative on new MSP Program processes, requirements, and expectations.
3. Vendor's complete the [Vendor Information and Authorization Routing Form](#) - *If not previously completed.*
4. Vendor's complete the [Vendor Personnel Compliance Form](#) and the [Code of Conduct](#) for each Vendor Representative
 - **Please hold off on completing Vendor Personnel Compliance Form. An update will be provided to the Vision Vendor Community, once the Vendor Personnel Compliance Form is ready for your submission.**

■ Review of New Reporting Documents

- Electronic Service Summary
- Exhibit P1 - Vision Services RSA Fee Schedule
- Exhibit P2 - Vision Services Basic Eye Evaluation Approval Request Form
- Exhibit P3 - Vision Services Basic Eye Evaluation Final Report
- Exhibit P4 - Vision Services Comprehensive Eye Evaluation Approval Request Form
- Exhibit P5 - Vision Services Comprehensive Eye Evaluation Final Form
- Exhibit P6 - Vision Services Comprehensive Clinical Low Vision Evaluation Approval Request Form
- Exhibit P7 - Vision Services Comprehensive Clinical Low Vision Evaluation Final Report

Review of New Reporting Documents (cont.)

Basic Eye Exam	Comprehensive Eye Exam	Comprehensive Clinical Low Vision Eye Exam
<p>Eye Exam: Exhibit P2 – Vision Services Basic Eye Evaluation Approval Request Form</p>	<p>Eye Exam: Exhibit P4 – Vision Services Comprehensive Eye Evaluation Approval Request Form</p>	<p>Eye Exam: Exhibit P6 – Vision Services Comprehensive Clinical Low Vision Evaluation Approval Request Form</p>
<p>Eyewear and Optical Devices: Exhibit P3 – Vision Services Basic Eye Evaluation Final Report</p>	<p>Eyewear and Optical Devices: Exhibit P5 – Vision Services Comprehensive Eye Evaluation Final Report</p>	<p>Eyewear and Optical Devices: Exhibit P7 – Vision Services Comprehensive Clinical Low Vision Evaluation Final Report</p>

Questions

Contact Us

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Thank you