

NC DIVISION OF SERVICES FOR THE BLIND ORIENTATION AND MOBILITY GUIDELINES

Title: Orientation and Mobility Guidelines
Current Effective Date: 06/08

FORMS

DSB-4002-ILR	Independent Living Rehabilitation Referral
DSB-4002-VR	Vocational Rehabilitation Referral
DSB-4004-ILR	Independent Living Rehabilitation Application
DSB-4005b-VR	Individual Plan for Employment
DSB-4043	Mini-Center Mobility Report
DSB-7080	Cane Request Form
DSB-7103	Independent Living Services Program Assessment and Plan
DSB-7103-B	Orientation and Mobility Services Plan
DSB-7404	Notice: White Support Cane

Introduction

Orientation and mobility (O&M) is a type of training designed to promote safe, independent movement of persons with blindness or visual impairment. Orientation training is designed to help such individuals determine their location in space and how to plan travel from one point to another. Mobility training involves teaching visually impaired persons to move safely from one place to another, which often requires the use of a mobility device, such as a long cane. Using a combination of orientation and mobility techniques, persons who are blind or visually impaired can learn to move around their homes, communities and the world at large with greater independence.

Orientation and Mobility Services

There are a variety of skills that help persons with visual impairments to achieve greater independence. Orientation and Mobility Specialist provide instruction or recommendations to maximize independent movement, services include:

- Evaluation of O&M needs or skills
- Basic sighted guide
- Self protective techniques
- Public transportation use (city buses, taxis, trains)
- Orientation to school campus, routes or job sites
- Residential and business travel skills
- Indoor/outdoor cane skills
- Street crossings
- Route travel
- Use of landmarks and clues
- Route planning and travel
- Map reading skills
- Use of compass directions
- Environmental assessments
- Evaluation for sunglasses, when appropriate

Or any specialized skill such as:

- Use of white support cane. Long cane if appropriate, if not a short cane will be ordered.
- Evaluation or preparation for dog guide school
- Orientation for dog guide users
- Evaluation and use of monocular telescopes
- Rural travel skills
- Provide evaluation and basic information pertaining to school or agency approved GPS devices, particularly for transition high school students.

When to Refer for Orientation and Mobility Services

Persons with blindness or visual impairments should be referred for O&M services when he/she can move independently and:

Has experienced a significant change in vision,

- Needs to become familiar with a new environment or route,
- When vision loss infringes on movement typical for the consumer, or
- When seeking evaluation to learn a special mobility device, such as a dog guide or Global Positioning System (GPS).

Priority of Referrals

Persons with blindness or visual impairment will receive priority for services in the following order:

- Anyone working towards employment,
- College bound or seeking further development of skills through secondary education,
- Independent Living Services (ILS)

REFERRAL PROCESS FOR INDEPENDENT LIVING REHABILITATION COUNSELOR FOR O&M SERVICES – Independent Living Rehabilitation Counselors will submit the following forms to the Orientation and Mobility Specialist

- [Referral form \(On-Line DSB Form 4002-ILR\)](#)
- [Independent Living Rehabilitation \(ILR\) Application \(On-Line DSB-4004-ILR\)](#)
- Recent eye report
- Additional relevant medical information
- Information regarding previous vision services

Responsibilities of the Orientation and Mobility Specialist to the Independent Living Rehabilitation Counselor

1. The Orientation and Mobility Specialist shall contact by mail or in person, all individuals referred for extensive training in their homes and communities within 30 calendar days of receiving the referral.
2. The Orientation and Mobility Specialist shall send a copy of the written report of the initial visit and assessment that includes the plan of services to the referring professional within 15 calendar days after the Orientation and Mobility Specialist completes the initial visit/assessment.
3. The Orientation and Mobility Specialist shall submit recommendations for mobility aids and sun wear for individuals to the referring professional. If a white support cane is recommended for the consumer, upon delivery of the cane the Orientation and Mobility Specialist will complete two copies of the Notice: White Support Cane form. One copy will be maintained in the Orientation and Mobility case file and one copy will be sent to the Independent Living Specialist for their files.
4. The Orientation and Mobility Specialist shall provide training to the individual and/or family and provide copies of all case progress notes to the referring professional.
5. The Orientation and Mobility Specialist shall provide education and consultation to family members of individuals referred upon request of the referring professional.
6. The Orientation and Mobility Specialist shall provide ongoing progress reports on a visit by visit, monthly, or quarterly basis.

7. The Orientation and Mobility Specialist shall inform the Independent Living Rehabilitation Counselor of case referred by them.
8. The Orientation and Mobility Specialist shall provide education and training at all Mini-Centers in coordination with the Independent Living Rehabilitation Counselor according to the following outline:

DAY 1: O&M OVERVIEW

- Orientation and Mobility Specialist will be available for presentations for a minimum of one hour with additional time being devoted to individual meetings with participants.
- Presentation and individual meeting time will be determined in collaboration with the Orientation and Mobility Specialist and the Independent Living Rehabilitation Counselor.
- Brief description of DSB's O&M services
- Hands on instruction, with the participants, in sighted guide techniques, protective techniques, trailing, locating and retrieving dropped objects, locating seating and entering/exiting doors and vehicles
- Orientation to the facility
- Introduce participants to sun wear and canes
- Demonstration of basic cane techniques
- Meet with participants individually to determine O&M needs for canes, (which includes canes for identification), and sun wear
- Measure for canes, only individuals interested in O&M training.
- Mini Center referrals for all participants should be completed prior to the date of scheduled mini center.
- Request full referral from appropriate source, for those individuals interested in O&M training.

DAY 2: FOLLOW-UP (NOT NECESSARILY CONSECUTIVE WEEKS)

- Address any concerns or questions of individuals and the Independent Living Rehabilitation Counselor
- Review sighted guide, protective techniques and trailing, if necessary, on an individual basis
- Meet with new participants on an individual basis
- Complete Mini Center Mobility Report and provide a copy for the Independent Living Rehabilitation Counselor

REFERRAL PROCESS FOR A VOCATIONAL REHABILITATION COUNSELOR FOR O&M SERVICES – Vocational Rehabilitation Counselors will submit the following forms to the Orientation and Mobility Specialist:

- [Referral form \(On-Line DSB Form 4002-VR\)](#)
- [VR/Rehabilitation Application \(On-Line DSB-4004-VR\)](#)
- Recent eye report
- Additional relevant medical information that could affect mobility
- Information regarding previous North Carolina Division of Services for the Blind (DSB) vision services, if available
- [Individual Plan for Employment \(IPE\) \(On-Line DSB 4005b-VR\)](#) or previous Mobility notes

Responsibilities of the Orientation & Mobility Specialist to the Vocational Rehabilitation Counselor

1. The Orientation and Mobility Specialist shall contact by mail or in person all individuals referred for extensive training in their homes and communities within 30 calendar days of receiving the referral.
2. The Orientation and Mobility Specialist shall send a copy of the written report of the initial visit and assessment that includes “the plan of services” to the referring professional within 15 calendar days after the Orientation and Mobility Specialist completes the initial visit/assessment
3. The Orientation and Mobility Specialist shall submit recommendations for mobility aids and sun wear for individuals to the referring professional. If a white support cane is recommended for the consumer, upon delivery of the cane the Orientation and Mobility Specialist will complete two copies of the Notice: White Support Cane form. One copy will be maintained in the Orientation and Mobility case file and one copy will be sent to the Vocational Rehabilitation Counselor for their files.
4. The Orientation and Mobility Specialist shall provide training to the individual and/or family and provide copies of all case progress notes to the referring professional.
5. The Orientation and Mobility Specialist shall provide education and consultation to family members of individuals referred upon request of the referring professional.
6. The Orientation and Mobility Specialist shall provide ongoing progress reports on a visit by visit, monthly, or quarterly basis.
7. The Orientation and Mobility Specialist shall inform the Counselor of cases referred by that particular Counselor.

REFERRAL PROCESS FOR SOCIAL WORKERS for O&M SERVICES –

Social Workers will submit the following forms to the Orientation and Mobility Specialist

- [Referral form \(On-Line DSB-7103\)](#)
- Recent eye report
- Additional relevant medical information that could affect mobility
- Case notes

Responsibilities of the Orientation and Mobility Specialist to Social Worker

1. The Orientation and Mobility Specialist shall contact by mail or in person all individuals referred for basic training in their homes and communities within 30 calendar days of receiving the referral.
2. The Orientation and Mobility Specialist shall complete the [Orientation and Mobility Service Plan \(On-Line DSB-7103-B\)](#) detailing what the consumer will do or attempt to do to increase independent travel skills.
3. The Orientation and Mobility Specialist shall send a copy of the written report of the initial visit and assessment that includes the plan of services to the referring professional within 15 calendar days after the Orientation and Mobility Specialist completes the initial visit/assessment.
4. The Orientation and Mobility Specialist shall submit recommendations for mobility aids and sun wear for individuals to the referring professional. If a white support cane is recommended for

the consumer, upon delivery of the cane the Orientation and Mobility Specialist will complete two copies of the Notice: White Support Cane form. One copy will be maintained in the Orientation and Mobility case file and one copy will be sent to the Social Worker for their files.

5. The Orientation and Mobility Specialist shall provide training to the individual and/or family and provide copies of all case progress notes the referring professional.
6. The Orientation and Mobility Specialist shall provide education and consultation to family members of individuals referred upon request of the referring professional.
7. The Orientation and Mobility Specialist shall arrange sighted guide training to staff at assisted living facilities upon request of the social worker.
8. The Orientation and Mobility Specialist shall provide ongoing progress reports on a visit by visit, monthly, or quarterly basis.
9. The Orientation and Mobility Specialist shall inform the Social Worker of cases referred by the particular counselor.

Record Keeping and Case Closures

Orientation and Mobility Specialist shall become familiar with and abide by the following sections of the DSB Independent Living Services Manual, available online:

- [Section 310: Case Process for Resource Specialist](#) (On-Line ILS-DSB Case Process for Resource Specialists)
- [Section 320: Case Records and Recording](#) (On-Line ILS-DSB Case Records and Recording)
- [Cane Request Form \(On-Line DSB-7080\)](#)
- [Orientation & Mobility Services Plan \(On-Line DSB-7103-B\)](#)
- [Mini Center Mobility Report \(On-Line DSB-4043\)](#)

Orientation and Mobility Specialists are also responsible for ensuring services rendered are recorded in the agency's Electronic Services System (ESS). There is an ESS Manual, which has instructions on how to record referrals, visits, and closures. However, for quick reference, follow the instructions per Mobility Referral Information, which is a document provided as an addendum to this O&M service manual.

Orientation and Mobility Specialists shall close cases upon plan completion or when further instruction is no longer useful or possible.

Orientation and Mobility Specialists shall not maintain open files on cases closed by referring professionals if notice is given from the referral source.

Services to Children and Youth

Orientation and Mobility Specialists shall provide services to school aged youth:

- after school hours or when daily instruction is complete
- during summer months
- during school- breaks
- when transition age students are planning on getting a job
- home schooled children will be provided services according to the same schedule as other students.

Orientation and mobility training for transition age students learning to use a DSB approved GPS device shall receive training:

- after school hours or when daily instruction is complete or
- during school breaks
- but not in the summer.

Monocular Telescopes (pending appropriate training for monocular evaluations):

Orientation and Mobility Specialists shall provide monocular assessments on an as needed basis.

Code of Ethics

Orientation and Mobility Specialists should maintain a copy of the [Code of Ethics for Orientation and Mobility Specialists](#) and abide by its standard

MOBILITY REFERRAL INFORMATION

Mobility Referral is for adding and updating client information into the Mobility Services system.

From the Main Menu, choose Option 1 - Client Services System

From the Client Services Menu, choose Option 2 - Client Add/Update;

From the Client/Add Menu, choose Option 4 - Mobility.

As this is the first screen in the Mobility Program, there will be a need to enter the SSN.

Social Security Number: Enter the individual's Social Security Number.

The following fields do not have to be completed by you as the information is already in the Electronic Services System and are protected:

Name:

Date of Birth:

County:

Vision Status:

Referral Date: Enter eight.-digit code to indicate month, day, and year that consumer was referred for specialized independent living services. Use MMJDD/Four Digit Year format- Cannot be past current date.

Referral Source: Enter source of referral. Examples: Name of doctor, teacher, Social Worker for the Blind. Limited to 10 digits.

Program Referral: Enter one-digit code to designate DSB Program that referred consumer to Orientation and Mobility Specialist.

Code 1-ILS Program

Code 2-VR Program

Code 3-ILR Program

Status: Enter the two-digit code to designate the consumer's status in the service delivery system.

Valid statuses are:

- 00-Referral/Evaluation
- 08-Rejected
- 24-Service Interrupted
- 48-Closed Unsuccessful
- 49-Closed Successful
- 89-Open Active

Status Date: Enter eight-digit code to designate date the individual was placed in his/her current client status. Use MM/DD/Four Digit Year format. Cannot be past current date nor prior to Referral Date.

Worker: Enter worker's four-digit worker number.

Referral Goal: Narrative Entry. In 2-3 sentences, describe the expected achievement of client toward increased independence.

Contact Date: Enter eight-digit code to record date that you contacted the referral. This date cannot be past current date nor prior to referral date. Use MM/DD/Four Digit Year format. This contact date may be the date that you contacted the referral by telephone or letter to acknowledge referral or the date of personal contact, whichever is earliest.

At the bottom of each screen, there is a list of PF keys with an explanation for each key.

Note: If a referral is closed, the Referral information may not be updated nor may the function keys be used to edit Service code information. Monthly Unit Detail Information, or transfer the client. If a new referral needs to be added for client with a currently closed Referral, press F5.

To add, update or delete Service Code information, press PF4 to go to the Service Code Maintenance Screen. To update, Monthly Unit Detail Information press PF6 to go to the Monthly Unit Detail Maintenance Screen. To transfer a client to a new worker, press PF7 to the Client Transfer Screen.