



SSB Community Partner Monitoring Protocol Checklist Administrative & Fiscal

For each monitoring protocol area, the Administrative and Fiscal requirements are listed. Each area asks if the Community Provider complies, if the Community Partner meets the requirements and standards, and how that is determined. The contract language governing each area of expectation is cited, along with its location in the contract. The monitoring event is based upon meeting these requirements.

In addition, the monitoring team must be able to identify and provide documented evidence for each of the areas identified. During the review, the Community Partner will be asked to provide evidence or documentation of how they meet the requirement for each area. Each section asks the team to identify and document evidence that supports the determination that the requirement is met. If the requirement is not met, a Corrective Action Plan will be implemented.

Review of consumer records or other records, fee schedules, travel logs, submitted invoices are used for determination in the following areas.

Administrative

The CRP contract states that the Community Partner shall not bill the state for an amount greater than the fees authorized in the contract and work authorization. This means that the services provided, and fees invoiced are consistent with the CONTRACT and WORK authorization, and the Community Partner only bills for services actually provided to the client. **Consideration 5.1.3, Exhibit A: Contract Terms 1.1**

The CRP contract requires that the Community Partner bills for services only for the authorized time period. **Consideration 5.1.3**

Fiscal and Administrative – Lead monitor will pull a random sample of cases for review

The CRP contract states that for travel that exceeds 3 hours travel time (one way), resulting in an overnight stay, hotel, and food allowances will be charged consistent with the [Commissioner's Plan Chapter 15 State Travel Expense Policy](#) . Consideration. Travel Expenses 5.1.6

The CRP contract states that irrespective of funding source, the Community Partner cannot bill travel time or mileage from their home base to the training site for more than one consumer when training two or more consumers who live in the same location or in close proximity.

In the case of training two or more consumers who live in the same location or close proximity, mileage and travel time must be billed equitably among the WORK authorizations. The total billing for travel time or

mileage of multiple consumers served in the same trip irrespective of proximity or funding source may not exceed the total actual travel time and mileage for the whole trip. **Consideration. Travel Expenses 5.1.6**

Travel reimbursement is included when billing for services under a WORK Authorization. **Payment 5.2.2**

E-Verify - Review E-verify documentation of enrollment, documentation of use, other

The CRP contract states that for services valued in excess of \$50,000, Community Partner has implemented the federal E-Verify program for all newly hired employees in the United States who will perform work on behalf of the State.

Policies and Procedures-Interview and Review whether policies were changed, received, and are complete?

The CRP contract states that the Community Partner, upon signing an agreement and at the request of SSB, will provide SSB a copy of their policies and procedures, including those concerning: customer appeals; non-discrimination; accessibility, including sign language interpreters; health and safety; and emergency procedures. **2.7 Scope of Work. Policies and Procedures**

The CRP contract states that the Community Partner will provide SSB a copy of any changes in its policies and procedures within 30 days of any such change. **2.7 Scope of Work. Policies and Procedures**

Insurance - Review Certificate of Insurance, other

The CRP contract states that the Community Partner shall not commence work under the contract until they have obtained all the required insurance and the State of Minnesota has approved the insurance. Community Partner shall maintain such insurance in force and effect throughout the term of the contract. **Exhibit C: Insurance Requirements, 1.1,1.2**

The CRP contract states that the insurance certificate holder should be addressed to DEED-SSB at the 2200 University Ave W. Suite 240, St. Paul MN 55114 address. **Exhibit C: Insurance Requirements, 2.2**

Training - Review training lists, interviews, others

The contract requires all Contractor staff providing job placement services with consumers of SSB to attend a training session in placement-related issues specific to employment of people who are blind, low vision, or DeafBlind. New Contractor staff doing job placement with consumers of SSB must attend a training session within six months of their start date.

Communication -Review consumer file, Community Partner records, interviews, other

The CRP contract requires the Community Partner to advise the SSB Direct Service Staff if a change in services appears to be needed to meet the goal in the customer's IPE or service plan. **2.5 Communication**

The contract requires the Community Partner to notify the SSB Direct Service Staff by the next day of business of events that adversely impact training **including absences**. This notification is in addition to any made by the consumer to the SSB Direct Service Staff. Examples include customer illness requiring hospitalization, customer injury, etc. **2.5 Communication**

The CRP contract requires the Community Partner to contact SSB with notification of building closures or other incidents that adversely impact training. Examples include closures due to weather conditions, power failure, water damage, etc. **2.5 Communication**

Reports - Review consumer files, Community Partner records, interviews, other

[Minnesota Rules 3325.0470 Subp. 7](#) requires community rehabilitation programs to provide timely written reports as required by SSB concerning the progress of eligible individuals in the development of self-confidence, the performance of activities of daily living, and the use of rehabilitation technology, if applicable. Monthly progress reports for Adjustment to Blindness services will be provided to the SSB Direct Service Staff within 10 business days of the end of each month. **2.4 Reports**

The CRP contract requires that a final report, including recommendations, be provided to the SSB Direct Service Staff within 10 business days of program completion. **2.4 Reports**

[Minnesota Rules 3325.0470 Subp. 7](#) and the CRP contract (2.4 Reports) required for ATB services states that reports will include: Attendance and punctuality (number and date of classes: scheduled; attended; and times tardy);

Interpreters attendance (date of classes: scheduled; attended);

Progress made towards goals in accordance with the referral - written in measurable/objective terms;

Additional pertinent information, including customer progress in the development of self-confidence, the performance of activities of daily living, and the use of rehabilitation technology, if applicable; and plan for next month of service, if applicable. **2.4 Reports**

The contract requires that monthly progress reports for employment-related and placement services will be provided to the SSB Direct Service Staff which detail the job development activities of that month within 10 days of the end of each month. These activities must comply with the written plan for placement for reimbursement to occur.

Reports must include:

- Date, customer's name;
- The name of the business contacted;
- Person contacted and their title;
- Method of contact (phone, email, in person, by letter);
- Reason for the contact;
- Results of the contact and next steps; Outcome (e.g. interview offered, internship, OJT, etc.);
- Interpreters attendance (date of meetings; scheduled; attended; and

Progress made towards goals in accordance with the referral – written in measurable/objective terms.

2.4 Reports

Outcomes, Achievements and Best Practices

The CRP contract states that the SSB Direct Service Staff's initial referral letter and subsequent refinements will set the minimal expectations for each consumer's anticipated outcomes. The Community Partner's curriculum will be considered in the establishment of expectations and the development of the initial referral letter.

The Community Partner will advise the Direct Service Staff if a change in services appears to be needed to meet the goals in the customer's IPE or service plan.

All changes in services must be agreed upon by the Community Partner and the Direct Service Staff. **2.6 Standards and Evaluation Procedures**

- Have customers receiving services from this Community Partner met the minimal expectations for anticipated outcomes contained in the initial referral letter and any subsequent refinements?
- Were SSB Direct Service Staff advised when changes in services appear to be needed?
- Were all changes in services agreed upon by the Community Partner and the Direct Service Staff?

Adjustment to Blindness Customer Satisfaction Questionnaire

[Minnesota State Statute 3325.0470 Subp 4](#)

State Services for the Blind periodically administers an Adjustment to Blindness Customer Satisfaction Questionnaire to customers. The intent is to gain information about customer satisfaction that will help other customers make an informed choice when selecting Adjustment to Blindness vendors for themselves and to help Adjustment to Blindness vendors make changes to improve their services.

Review Adjustment to Blindness Customer Satisfaction Questionnaire results

State Services for the Blind is interested in achievements of the Community Partner, and any best practices that improve outcomes for blind, DeafBlind, and low vision customers.

Describe any achievements and best practices of the Community Partner.

Does the Community Partner attend the Quarterly SSB Community Partner + SSB WDU Staff Forums? Why or why not?

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