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PRO-15-03

To: All ACCES-VR Staff
From: Frank Coco
Date: March 13, 2015
Subject: Maintenance and Transportation (M&T) Procedure
When the A/V or Reimbursement is Not Provided to the VR Participant Directly

Purpose

Previously the M&T process had been used to directly pay participants for goods and/or services that would otherwise be unavailable to them. Implementation of PRO-05-02 Direct Payment to Consumer ended this practice as it had failed to provide an adequate audit trail, resulted in inflated costs for maintenance and transportation, and under-reported payments for other types of vocational rehabilitation services.

As a result the M&T (maintenance and transportation) payment system may only be used for maintenance and transportation services.

Maintenance Services (Room and Board) - is subject to limitations as described in appropriate Policy.

Transportation Services - should be provided only when the participant would not otherwise be able to attend VR services. Services should be provided for the dates the individual is in program and use the most cost-effective method of transportation.

As a result of a recent audit, it was brought to our attention that while most M&T funds are appropriately authorized and documented in the record of services, verification the service was lacking in some circumstances. Lack of verification occurs most often when the VR participant's reimbursement is mailed to a third party or is authorized to a third party for the VR participant

The purpose of this procedure is to adequately verify and document receipt of M&T services when:

- The M&T reimbursement is mailed to a third party; or
- the M&T authorization is made to a third party for the VR participant.

Procedure

When M&T Reimbursement Is Mailed to a Third Party or Authorized to a Third Party

ACCES-VR prefers that M&T reimbursement is made directly to the VR participant but this may be contraindicated if the individual requires assistance in managing their reimbursement, have a payee or request it to support the VR process.

- The IPE Note should document why the M&T reimbursement is mailed to a third party or is authorized to a third party.
- A copy of the M&T authorization printouts must be in the finance folder. A record of the transaction must exist in the mainframe.
- Within the participant's finance folder, there must be evidence that the services were in fact provided. The documentation may include time sheets or receipts signed by the participant or a case note confirming that the participant has been contacted and has confirmed receipt of services.

EFFECTIVE DATE: Immediately

REFERENCE:

1355.00 Transportation Services Policy
PRO-05-02 Direct Payments to Consumer
POL-15-01 Mileage Rate Increase
FIS-04-11 Replacement of Authorizations for Goods and Services



Frank Coco