

## **FINANCIAL EXPENDITURES**

### **I. Client Purchases**

The Vision Rehabilitation Specialist (VRS) will complete a thorough assessment with each client to determine the individual's needs. Funds will be used to purchase AT devices for clients. It is not for the purchase of educational videos, textbooks, etc. All purchases must be reasonable and necessary. When purchasing devices, the VRS should purchase the most economical device that meets the needs of the client. The VRS is responsible for documenting the rationale behind purchasing more expensive devices. The VRS is responsible for documenting in case notes when a client is provided a device, or if a client returns a device.

A client may receive one of each device type. For example, the client may be provided with one stand magnifier, one pocket magnifier, one watch, one clock, etc. Once the item is delivered to the client, the client is responsible for replacing batteries and bulbs in the devices. Items such as 20/20 pens, touch dots, and wide line paper are considered assistive technology. Clients can be provided with an adequate supply based on their needs and then are responsible for ordering additional items. If a client needs a device replaced due to regular use, or misuse, the client is responsible for replacement. When a client needs to order a new device, the VRS can assist the client in determining the appropriate device and provide information on where to purchase the device. Exceptions may be made on a case-by-case basis with supervisor approval and documented in the case file.

If the client's vision impairment worsens, the VRS will complete a new assessment to determine the client's needs based on the change in vision. The VRS can provide appropriate technology and Older Individuals Who Are Blind (OIB) services to meet the client's needs.

The VRS may provide clients with devices that have been previously used. The client should only be provided used equipment that is in working order and meets the client's need. Used devices may be provided to a client to replace devices the client previously received. For example, if a client has a device that was provided through the OIB program, and the device breaks, the VRS can replace the device with a used device.

OIB services are to be provided to individuals who are living independently and as a result, client purchases cannot be made for individuals living in skilled nursing facilities. If an OIB client moves into a skilled nursing facility, the individual can take the

previously purchased devices to the nursing home. The VRS can assist the client in the transition and make recommendations on items that may benefit the individual in the new setting; however, the individual is responsible for the purchase of these items. If the client is only in the nursing home for rehabilitation services and will be going home, OIB services can be provided. If a nursing home resident is planning to move into the community, a case can be opened while the resident is still in the nursing home once plans for returning to the community have been confirmed.

## **II. Budget Management**

The entire OIB budget authority will be accessible by all VRSs across the state. In an effort to maximize the funds allotted to the OIB program, VRSs are encouraged to order assistive technology devices in bulk so the agency is not charged shipping and handling costs.

## **III. General Requirements For All Purchases**

All purchases for clients must be reasonable and necessary. When making any type of purchase, bulk or single item purchase, certain guidelines must be followed.

1. The State of North Dakota is tax exempt; therefore, as an agency of the State, Vocational Rehabilitation (VR) does not pay state and local sales tax.
2. VR issues an authorization to a vendor providing the service and upon receipt of a bill, processes payment to the vendor. VR does not reimburse OIB clients for purchases of devices or equipment.
3. For authorization of a bulk authorization see [Creating And Paying Authorizations.docx](#) ).
4. Once the item(s) have been received and paid for, the authorization is attached to the invoice. Follow the Department of Human Services' retention guidelines.
5. Purchases under \$10,000 do not require bids. VRSs are encouraged to get the best price possible for all purchases.
6. When purchasing items when the total for all items will be \$10,000 or above, the bid process must be followed. This process is outlined in the [Client Purchases.docx](#) .

## **IV. Large Print Calendars**

Large print calendars may be provided to open clients who would benefit from one. A client with a closed case can receive a new calendar, if requested. Previous clients living in skilled nursing facilities should be referred to the ND Vision Services/School for the Blind.

Senior centers can be provided with a small number of calendars to assist with clientele. Skilled nursing facilities will not receive a supply of calendars.

**Summary of Changes:**

4-2022 – Increased bid amounts to \$10,000 from \$5,000

9-2023 – Added exception to additional items by supervisor.