



# Pennsylvania Rehabilitation Council (PaRC)

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## **OVR Policy & State Plan / Customer Satisfaction Committee Minutes for December 12, 2024, 10:00 AM to 11:00 AM**

### **Members Present (P)**

### **Not Present (NP)**

Lynn Heitz (P)  
Twana Jones (NP)  
Susan Tomasic (NP)

Christie Cyktor (P)  
Jessica Keogh (NP)  
William Paz De Melo (NP)

Sylenthia Dent-Siebenlist (P)  
Julianna Rodrigues (P)  
Joan Myers Goodman (P)

**Office of Vocational Rehabilitation (OVR) Staff Present:** James Whitonis, Chris Harbert, Audrey O'Connor, Cheryl Novak, Ralph Roach

**Project Staff Present:** Chris Todd, Michelle Gerrick

### **CALL TO ORDER**

This meeting was conducted through Zoom. Ms. Lynn Heitz called the meeting to order at 10:00 AM after quorum was established.

### **ADDITIONS TO THE AGENDA**

There were no additions.

### **APPROVAL OF THE AGENDA AND PAST MINUTES**

***MOTION was made by Ms. Julia Barol to approve today's agenda and past meeting minutes. Ms. Christie Cyktor seconded the motion. All were in favor.***

### **DISCUSSION ITEMS:**

#### **OVR Updates**

#### **Financial Needs Test (FNT) Policy**

- Ms. Lynn Heitz and Ms. Joan Myers Goodman shared that they recently met with OVR regarding Public Comment that Ms. Myers Goodman provided for the Financial Needs Test (FNT) policy which included her concerns that those at working age to retirement age are put at a disadvantage and could be disqualified by the FNT because the waiver may expose assets. Ms. Myers Goodman explained that while

an employer must provide reasonable accommodations, OVR is the best resource for job retention or returning to work if someone becomes disabled and suggested that the FNT not be required for working individuals for job retention services. Ms. Heitz provided the example of an individual that is employed with a salary over \$50,000 that experiences vision loss may apply for services and assessments, training, accessibility software, etc. with the Bureau of Blindness and Visual Services (BBVS) could be denied a waiver and have to pay for such services. Ms. Heitz suggested that those who are currently employed not be affected by the Order of Selection (OOS) or the FNT.

- Mr. Chris Harbert explained that many times job retention services are not cost services. During the FNT process the individual's income factors in multiple deductions such as disability services, dependents, and other deductions following that process only 10% of that final number and does not place an unreasonable or undue payment expectation upon the customer.
- Ms. Cheryl Novak explained that the FNT is a legislative requirement in the Commonwealth, OVR has added a lot of financial flexibility into the FNT to adapt to changes to the financial situation. The scenarios that members shared can come up and is why OVR has the waiver process in place. The counselor can bring a case to the District Administrator (DA) and the FNT can be waived for the customer, which happens frequently. The DA is not required to take into consideration customer assets and there is no formula where assets would be calculated for the waiver. OVR has included as much flexibility in the FNT and the waiver to provide services to those that need it and there is also the Client Assistance Program (CAP). Customers also have CAP as a resource if there is a financial hardship situation.
- Members inquired about the waiver process for the FNT, and Ms. Audrey O'Connor shared and reviewed the financial hardship form which is a worksheet provided to customers to share their income, assets, expenses, and other financial information.
- Ms. Heitz shared concerns about delays in job retention services due to the FNT and waiver process along with staffing concerns that may result in the loss of employment for a customer.
- Ms. Novak explained that there are many scenarios that are taken into consideration with the FNT policy and waiver process. Ms. Novak invited members to share their concerns in writing so that they may be provided with responses from leadership.
- Ms. Novak explained that the job retention services mentioned such as assessments, working with the employer, discussing job accommodations, and employer accommodations that were mentioned are not cost services and are not required to undergo the FNT process. When cost services are under consideration OVR has a streamlined process in place to work with job retention cases as quickly as possible, counselors, DAs, and OVR wants to be able to get customers to work to fulfill their mission, and they try to cover all bases to ensure there is a fair and evenly applied process when asked to do that legislatively.
- Members requested that the FNT legislative requirements and the job retention policy be shared with the Committee.
- Ms. Julianna Rodrigues explained that she agrees determinations are made on a case by case basis and inquired if counselor trainings should be provided to ensure the customer is made aware of the FNT policy and waiver. Improving the FNT

process with a review directly with the customer individually would be beneficial to ensure the customer is fully informed. Ms. Novak explained that the language was strengthened in the policy regarding the review of the form and waiver information to ensure the customer is informed. Staff trainings are planned to inform OVR staff when the new policy is implemented.

- Ms. Heitz inquired if the form is provided in Braille and requested information on District Offices providing forms in Braille. Ms. Novak explained that forms are provided in Braille if requested, that information can be shared with the Committee, and that customers are provided accessible files in their preferred method of communication such as those that can be read using a screen reader.
- Ms. O'Connor provided a reminder that there are 2 categories of OVR services. Services that are not subject to the FNT and cost services which are subject to the FNT. Job retention services start with assessments which are not subject to the FNT and may occur when forms such as the financial hardship forms are being completed. Non-cost services happen first to avoid a lag in services. The financial hardship form is attached to the policy draft.
- Members shared that they sent Public Comments for the FNT policy that OVR would have previously received. Many of those comments were received during the first Public Comment period, reviewed, addressed, and incorporated in the second draft of the FNT policy. The second draft of the FNT policy was shared with Full Council at the start of the second Public Comment period. The final draft of the FNT policy is scheduled to be shared with the Council for December 20, 2024.

### **Continued Discussion of Bender Consulting Project Regarding Customer Satisfaction Surveys Goal and Objectives**

- This discussion item was tabled, and members requested it be added to the January meeting agenda.

### **Schedule next meeting**

- Members agreed to hold their next Committee meeting on January 22, 2025, at 10:00 AM.

### **Adjourn**

***MOTION was made by Ms. Julia Barol to adjourn. Ms. Julianna Rodrigues seconded the motion. The meeting was adjourned.***