Format updated 5-2021 and 5-2022

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| **Itinerant** **Services** **(IS)**  For programs in specific market area requiring local business licenses and not already covered in other standards for services provided both in-facility and on an itinerant basis.  **Organization will establish a self-study committee to assess and rate the organization on the following:** | Supporting Documentation | Review Committee Decision | | |
| Indicate name of file or cite page in documents you provide to show compliance. | Fully Met | Partially Met | Not Met |
| 1. The organization has written statements that include accurate descriptions of services, intended outcomes, timelines for delivery of services and referral to other resources as appropriate as documented through a business plan, the articles of incorporation, published service policies and brochures as appropriate. |  |  |  |  |
| 2. The organization has complied with legal requirements to do business within a stated market area, is current with licenses, taxes and fees governing business within the defined market territory and has appropriate credentials for performing the services stated in the description of services. |  |  |  |  |
| 3. Written criteria exist for acceptance, denial, and appeal. This could be part of an application, information gathered during application or part of an assessment of the client. |  |  |  |  |
| 4. A list of primary referral sources is maintained within a defined geographic area served by the provider. |  |  |  |  |
| 5. Individuals are determined to be eligible for service by licensed and certified eye care professionals. |  |  |  |  |
| 6. A written individual plan exists for each learner and includes goals, objectives, prescribed services, and outcomes. |  |  |  |  |
| 7. The provider has sufficient liability insurance which is documented by the organization. |  |  |  |  |
| 8. Faculty, staff, and administration hold appropriate certification and licensure in their assigned area(s) as required. |  |  |  |  |
| 9. Teachers meet state certification requirements for working with learners who are blind and those with low vision and state certification requirements in the subject/field in which they teach. |  |  |  |  |
| 10. Related services personnel hold a valid state license and certification in the appropriate discipline and have graduated from an accredited institution of higher education. |  |  |  |  |

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| 11. Personnel receive in-service training and continuing education in visual impairment and in the area in which they are assigned. |  |  |  |  |
| 12. The provider shows evidence of collaboration with other organizations and programs. |  |  |  |  |
| 13. The provider has appropriate facilities and sufficient equipment available to provide services in a timely manner. |  |  |  |  |
| 14. A fee schedule is provided to prospective individuals and contracting organizations. |  |  |  |  |
| 15. Financial records and audits demonstrate the viability and sustainability of the services. |  |  |  |  |
| 16. Equipment and methods used to provide services are based on accepted practices in the field as taught through accredited higher education institutions, respected companies, and professional practice standards. |  |  |  |  |
| 17. The provider has a current criminal background check from multi-state law enforcement organizations. |  |  |  |  |
| 18. The provider maintains a written procedure for receiving consumer feedback and includes a record of any concerns as well as how any complaints were resolved. |  |  |  |  |
| 19. Consumers are contacted for feedback regarding satisfaction with services and any unresolved complaints. |  |  |  |  |
| Total Standards |  | /19 | /19 | /19 |

Required Documents

Please prepare a folder in Dropbox (or use other means of sharing as mutually agreed with AER) for your organization’s Itinerant Services Self-Study, with sub-folders labeled for each of the following documents:

* Self-Study (above)
* Policies and Procedures for Itinerant Services
* Comprehensive Itinerant Services Description that includes Goals, Objectives and Timeline in a Business Plan, Articles of Incorporation, Brochure or other Medium.
* Contractor’s Business license, Articles of Incorporation or Tax Exempt Letter (if Services are Contracted)
* Criteria for Providing Service and Eligibility Requirements
* List of Primary Referral Sources
* Individualized Service Delivery Plans
* Liability Insurance Verification
* Certification and Licensure Documentation for Program Personnel and Service Providers
* Verification of Personnel In-service Training and Continuing Education Completed in the Past 2 Years
* Chart of Fees
* List of Program Collaboration Partners and Description of Collaboration or Contributions
* **See** **Section** **I.** **(G)** **Program** **Evaluation** **and** **Improvement** **Required** **Documents** **and** **Submit** **Each** **Item** **for** **Itinerant** **Services** **and** **Label** **“I.** **(G)** **Itinerant** **Services.”**
* Narrative to explain any standards you rated as partially met or not met.
* Any other Narrative Remarks

List of Members of Self-Study Committee:

Date Self-Study Completed:

Date of Board Meeting approving Self-Study: