

PERM Manual

Version Number 1

Table of Contents

About the PERM System.....	4
Vendor Supervisor Dashboard	4
Pending Acceptance Referrals	5
Accepted Referrals	5
Referral Details Page	6
Customer Details	7
Documents	7
Benchmarks.....	7
Assigned to ES	7
Make a Decision	8
Recent Comments	8
Add Comments.....	8
How to Accept Referrals	8
How to Reject Referrals.....	9
How to Request more information from VR	9
How to Reassign Accepted Referrals	10
How to Search for a Customer	12
Select a Customer	12
Search Results	12
Reports.....	12
Referrals by Vendor.....	12
All MPRs by Vendor.....	13
Contact Us	13
Help.....	13
Update Profile	13
Employment Specialist Dashboard	13
Accepted Referrals	14
Referral Details Page	14
Customer Details	16
Documents	16

Benchmarks.....	16
Assigned to ES	16
Make a Decision	16
Recent Comments	16
Add Comment.....	16
How To Create a Monthly Progress Report (MPR).....	17
How to Edit a Monthly Progress Report (MPR)	18
How to Delete a Monthly Progress Report (MPR)	18
Glossary.....	20

About the PERM System

The Provider Electronic Referral Management (PERM) system is a web-based service management application for Vocational Rehabilitation Providers. The application provides a centralized portal for managing referrals for services, monthly progress reports, notification of approvals and invoices.

The PERM Manual is a technical assistance guide on using the application and its features.

Vendor Supervisor Dashboard

The Vendor Supervisor Dashboard allows the vendor supervisor to view: pending acceptance referrals/accepted referrals and access the search, reports, contact us and help sections.

The screenshot displays the Vendor Supervisor Dashboard interface. At the top, there are logos for the Florida Department of Education and Vocational Rehabilitation, along with navigation links: My Dashboard, Search, Reports, Contact Us, and Help. On the right, there are links for Welcome!, Update Profile, and Log Out. The main heading is 'Vendor Supervisor Dashboard' for the 'TEST Region'. Below this, there are two main sections: 'Pending Acceptance Referrals' and 'Accepted Referrals'.

Pending Acceptance Referrals (Total: 14)

Referral status	Referral Date	Customer Number	Customer Name	Referral Type	Remaining Days	
Pending Acceptance	10/07/2020			On The Job Training Referral	-31	Details
Pending Acceptance	12/03/2020			Employment Services Referral	-32	Details
Pending Acceptance	11/23/2020			On The Job Training Referral	-42	Details
Pending Acceptance	11/23/2020			On The Job Training Referral	-42	Details
Pending Acceptance	11/23/2020			Employment Services Referral	-42	Details
Pending Acceptance	10/07/2020			On The Job Training Referral	-46	Details
Pending Acceptance	11/18/2020			On The Job Training Referral	-47	Details
Pending Acceptance	11/13/2020			On The Job Training Referral	-52	Details
Pending Acceptance	11/13/2020			On The Job Training Referral	-52	Details
Pending Acceptance	11/02/2020			On The Job Training Referral	-53	Details

Showing 1 to 10 of 14 entries

Accepted Referrals (Total: 584)

Referral status	Referral Date	Customer Number	Customer Name	Referral Type	
Accepted	01/22/2021			Employment Services Referral	Details
Accepted	01/22/2021			Supported Employment Referral	Details
Accepted	01/21/2021			Supported Employment Referral	Details
Accepted	01/21/2021			Supported Employment Referral	Details
Accepted	01/08/2021			Supported Employment Referral	Details
Accepted	01/05/2021			Employment Services Referral	Details
Accepted	12/28/2020			Supported Employment Referral	Details
Accepted	12/23/2020			Supported Employment Referral	Details
Accepted	12/23/2020			On The Job Training Referral	Details
Accepted	12/23/2020			On The Job Training Referral	Details

Pending Acceptance Referrals

These are referrals that have been sent to the Provider by VR Staff and require action by the Supervisor to accept, reject or request additional information. Pending referrals must have action taken within fifteen (15) days or the referral will be closed by the system.

Accepted Referrals

These are the referrals that have been accepted by the Provider Agency and assigned to an ES. After a referral has been accepted Customer contact should be initiated within 2 weeks. If the Provider is unable to contact the Customer during this time period the Provider must notify the VR Counselor.

Referral Details Page

The Referral Details Page allows you to review the customer details such as remaining days, referral status, print, customer demographic and VR counselor information, review uploaded documents and assigned benchmarks. The Vendor Supervisor also assigns the Employment Specialist (ES) and accepts/rejects/asks for more information from this page.

The screenshot shows the 'Referral Details' page for the 'TEST Region'. The page is titled 'Referral Details' and is divided into two main sections: 'Customer Details' and 'Documents'.

Customer Details: This section displays information for an 'On The Job Training Referral' with ID 'VR0020783'. The referral status is 'Pending Acceptance' and there are '-31' remaining days. A 'Print' button is available. The details are organized into three columns:

Customer Name:	Customer ID:	Case Number: 01
Referral Date:	Address:	City:
State: FL	Zip Code:	Telephone:
VR Counselor:	VR Counselor Email:	VR Counselor Telephone:
Contractor:	Employment Outcome:	Disability:
	Nurses	

Documents: This section shows a list of documents with a total of 2. It includes a search bar, a dropdown menu set to '10', and a table of document entries.

Title	Category	Status	File Date	Action
Test 2	Other	Verified	05/03/2019 14:27:32	Protected
test	CBWE Rating Form	Verified	09/14/2020 11:57:22	Protected

Navigation controls at the bottom of the document list include a page indicator showing 'Showing 1 to 2 of 2 entries' and a set of arrows for navigating between pages.

On The Job Training Referral

All -

Benchmarks

Y10211 Work-based Learning Experience Plan
Y10212 Work-based Learning Experience Worksite Agreement
Y10213 Work-based Learning Experience Final Report

Showing 1 to 3 of 3 entries

Assigned To ES

Assigned ES *

Make Decision

Accepted
 Rejected
 More Info Required

Recent Comments
Comments: 1

Comment	Created By	Date Created
i need more information		

Add Comment

I certify that I or any parties employed with this company will provide services to the above mentioned DVR Consumer in accordance with the terms and conditions of the contractual agreement between this company and the Florida Department of Education Division of Vocational Rehabilitation.

Copyright © FLDOE.VR.PERM v1.0.2021.125 - Provider Electronic Referral Management 2021

Customer Details

Customer details provide contact information as well as information related to the Customers referral and/or case. The detail information updates as changes are made by VR staff in the case management system.

Documents

Documents are uploaded attachments by the referring VR staff member to provide additional supporting information related to the Customer and services referred. Protected documents within this section have been encrypted and are secure files.

Benchmarks

Benchmarks are the specific services on a referral type that have been requested by VR staff. Referred benchmarks cannot be modified and must be completed in sequential order, as referred.

Assigned to ES

The Vendor Supervisor will see referrals that have been sent to the agency by the VR Staff and accept the referral if the agency is agreeing to work with the customer. The

referral must be assigned to a certified ES meeting the requirements for the referred services as part of the referral acceptance process. The assigned ES will be the Provider staff member working with the Customer.

Make a Decision

Referrals must be accepted, rejected or additional information requested within fifteen (15) days.

Recent Comments

Comments that have been added will appear in the recent comments and remain with the referral for historical data.

Add Comments

Comments can be added to communicate and document information related to the referral when completing the actions accept, reject or request additional information.

How to Accept Referrals

The Vendor Supervisor will see referrals that have been sent to the agency by the VR Staff and accept the referral if the agency is agreeing to work with the customer.

From the Referral Details Page		
	Step	Action
Accepting Referrals		
1	Click in the 'Assigned to ES' box and select the ES name from the menu	ES name will appear in the 'Assigned to ES' box
2	Click the 'Accepted' radio button under 'Make Decision'	Radio button will be highlighted next to 'Accepted'
3	Enter any comments under the 'Add Comment' box	
4	Click the box stating, 'I certify that I or any parties employed with this company will provide services to the above mentioned DVR Consumer in accordance with the terms and conditions of the contractual agreement between this company and the Florida Department of Education Division of Vocational Rehabilitation'	Checkmark will appear in the box

From the Referral Details Page		
5	Click the 'Submit' button	'Referral successfully Accepted!' will appear

How to Reject Referrals

The Vendor Supervisor will see referrals that have been sent to the agency by the VR Staff and reject the referral if the agency is not agreeing to work with the customer. Information related to the rejection should be added to the comments section.

From the Referral Details Page		
	Step	Action
Accepting Referrals		
1	Click the 'Rejected' radio button under 'Make Decision'	Radio button will be highlighted next to 'Rejected' and 'Rejected Reasons' box will appear
2	Click the 'Rejected Reasons' box and select reason from the menu	Reason will appear in the 'Rejected Reasons' box
3	Enter any comments under the 'Add Comment' box	
4	Click the box stating, 'I certify that I or any parties employed with this company will provide services to the above mentioned DVR Consumer in accordance with the terms and conditions of the contractual agreement between this company and the Florida Department of Education Division of Vocational Rehabilitation'	Checkmark will appear in the box, this is a required field.
5	Click the 'Submit' button	'Referral successfully Closed!' will appear

How to Request more information from VR

The Vendor Supervisor will see referrals that have been sent to the agency by the VRC and request more information from the VRC if the agency needs more information to work with the customer. The requested information should be documented in the comments section.

From the Referral Details Page		
	Step	Action
Accepting Referrals		
1	Click the 'More Info Required' radio button under 'Make Decision'	Radio button will be highlighted next to 'More Info Required'
2	Enter the reason for your decision under the 'Add Comment' box	
3	Click the box stating, 'I certify that I or any parties employed with this company will provide services to the above mentioned DVR Consumer in accordance with the terms and conditions of the contractual agreement between this company and the Florida Department of Education Division of Vocational Rehabilitation'	Checkmark will appear in the box, this is a required field.
3	Click the 'Submit' button	'More Information requested successfully!!' will appear

How to Reassign Accepted Referrals

The Vendor Supervisor will see referrals that have been sent to the agency by the VRC and be able to change the assigned Employment Specialist (ES).

From the Referral Details Page		
	Step	Action
Accepting Referrals		
1	Click in the 'Assigned to ES' box and select the ES name from the menu	ES name will appear in the 'Assigned to ES' box
2	Enter any comments under the 'Add Comment' box	
3	Click the box stating, 'I certify that I or any parties employed with this company will provide services to the above mentioned DVR Consumer in accordance with the terms and conditions of the contractual	Checkmark will appear in the box

From the Referral Details Page		
	agreement between this company and the Florida Department of Education Division of Vocational Rehabilitation'	
4	Click the 'Save' button	'Referral successfully Assigned!' will appear

How to Search for a Customer

Search for a customer that is assigned to your agency. You can narrow your search by Employment Specialist (ES).

The screenshot shows the user interface for searching customers. At the top, there are navigation links: My Dashboard, Search, Reports, Contact Us, and Help. On the right, there is a 'Welcome!' message and links for Update Profile and Log Out. The main heading is 'Select a Customer'. Below this, there are two input fields: 'Vendor' and 'Employment Specialist'. The 'Employment Specialist' field has a dropdown menu with the text 'Please Select an Employment specialist'. Below these fields is a search bar with the placeholder text 'Enter 4 or more characters of Customer Name (Last, First) or VRID and click search' and a 'Search' button. The search results section is titled 'Search Results' and 'Customers:'. It features a search bar with a magnifying glass icon and a 'Search' button, and a dropdown menu set to '10'. Below the search bar is a table with columns for 'Customer', 'VR ID', and 'Details'. The table currently displays 'No results found!'. At the bottom of the table, it says 'Showing 0 to 0 of 0 entries'.

Select a Customer

In this section you will be able to find Customer referrals that have been assigned to your Agency.

Search Results

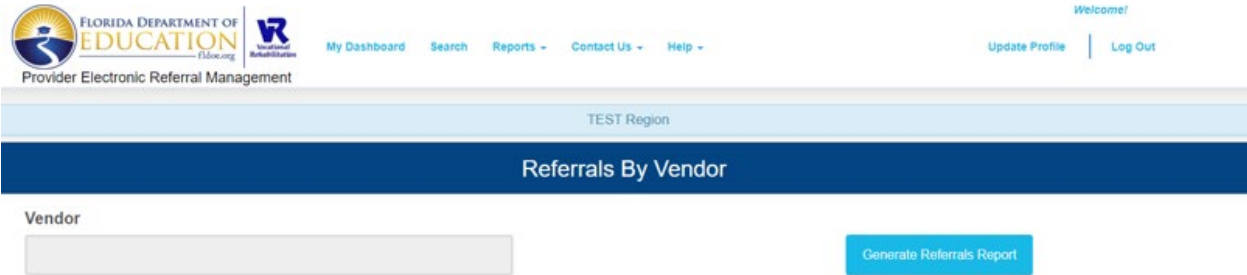
In this section the results from you search will display.

Reports

Reports can be created to give you more information about the cases that are assigned to your agency. You can run a report for referrals by vendor and all MPRs by vendor.

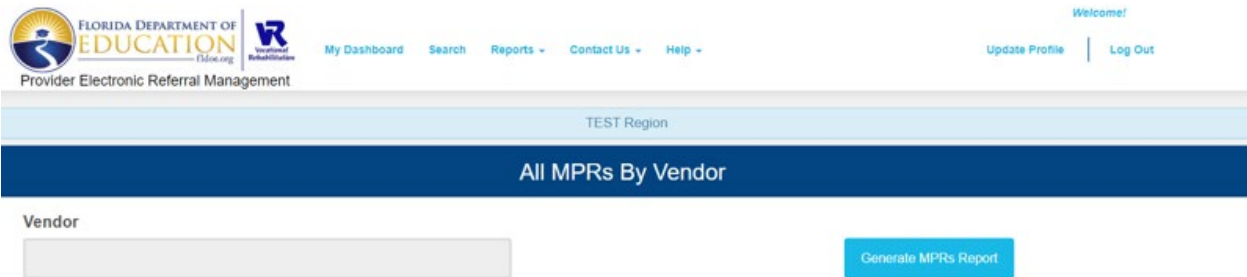
Referrals by Vendor

Generate a report to view, save, or print a table of all the referrals that are 'accepted', 'pending acceptance' or 'more information required' with your agency.



All MPRs by Vendor

Generate a report to view, save, or print a table of all the Monthly Progress Reports (MPRs) that have been generated by your agency.



Contact Us

Contact us if you need assistance with the PERM system.

Help

Find the User Guide and the Login Guide for PERM in this section.

Update Profile

You will be able to update your profile information from this section.

Employment Specialist Dashboard

The Employment Specialist Dashboard allows the Employment Specialist to view: accepted referrals and access the search, reports, contact us and help sections.



TEST Region

Employment Specialist Dashboard

Accepted Referrals **Total: 1**

Search 10

Referral status	Referral Date	Customer Number	Customer Name	Referral Type	
Accepted	01/05/2021			Employment Services Referral	Details

Showing 1 to 1 of 1 entries

Accepted Referrals

In this section you will view the accepted referrals for services that have been assigned to you.

Referral Details Page

The Referral Details Page allows you to review the customer details such as remaining days, referral status, print, customer demographic and VR counselor information, review uploaded documents and assigned benchmarks. The Employment Specialist also creates Monthly Progress Reports (MPRs) from this page.



TEST Region

Referral Details

Customer Details

Employment Services Referral		VR0866437 Remaining Days: N/A	Referral Status: Accepted	Print
Customer Name :	Customer ID :	Case Number: 01		
Referral Date: 01/05/2021	Address :	City :		
State : FL	Zip Code : 33973	Telephone :		
VR Counselor :	VR Counselor Email :	VR Counselor Telephone :		
Contractor :	Employment Outcome : Software Developers, Applications	Disability:		

Documents

Total: 1

Search [] 10 - []

Title	Category	Status	File Date	Action
sdfsdf	OJT Agreement	Verified	09/14/2020 11:57:22	Protected

Showing 1 to 1 of 1 entries

Employment Services Referral

Search [] All - []

Benchmarks	Create MPR	View MPRs	Create Approval Notice	View/Edit Approval Notice	Create Service Invoice	View/Edit Service Invoice
N10311 Pre-placement Training – 20 hours	Create MPR					
N10312 Employment Services Plan						
N10313 Placement						
N10314 30 day job retention						
N10315 60 day job retention						
N10316 90 day job retention						

Showing 1 to 6 of 6 entries

Assigned To ES

Assigned ES *

Make Decision

- Accepted
 Rejected
 More Info Required

Recent Comments

Comments: 0

Comment	Created By	Date Created
---------	------------	--------------

Add Comment

I certify that I or any parties employed with this company will provide services to the above mentioned DVR Consumer in accordance with the terms and conditions of the contractual agreement between this company and the Florida Department of Education Division of Vocational Rehabilitation.

Customer Details

Customer details provide contact information as well as information related to the Customers referral and/or case. The detail information updates as changes are made by VR staff in the case management system.

Documents

Documents are uploaded attachments by the referring VR staff member to provide additional supporting information related to the Customer and services referred. Protected documents within this section have been encrypted and are secure files.

Benchmarks

Benchmarks are the specific services on a referral type that have been requested by VR staff. Referred benchmarks cannot be modified and must be completed in sequential order, as referred.

Assigned to ES

The Vendor Supervisor will see referrals that have been sent to the agency by the VR Staff and accept the referral if the agency is agreeing to work with the customer. The referral must be assigned to a certified ES meeting the requirements for the referred services as part of the referral acceptance process. The assigned ES will be the Provider staff member working with the Customer.

Make a Decision

Referrals must be accepted, rejected or additional information requested within fifteen (15) days.

Recent Comments

Comments can be added to communicate and document information related to the referral when completing the actions accept, reject or request additional information.

Add Comment

Comments can be added to communicate and document information related to the referral when completing the actions accept, reject or request additional information.

How To Create a Monthly Progress Report (MPR)

Create a Monthly Progress Report for your consumer each month that you are assigned the case. Include detailed information about the delivery of referred services for a customer. MPRs should reflect the delivery of services, be specific to the customer and support the achievement of benchmarks

From the Referral Details Page		
	Step	Action
Creating MPRs		
1	Click in the blue 'Create MPR' hyperlink under the 'Create MPR' column	'Create Monthly Progress Report Details' screen will load
On the 'Create Monthly Progress Report Details' Screen		
2	Click in the 'Reporting Date' box	A calendar will appear below the 'Reporting Date' box
3	Click the date you want to select	The selected date will appear in the 'Reporting Date' box
4	Click the 'Create Activity' button	'Create Activity' screen will load
On the 'Create Activity'		
5	Click in the 'Referral Activity Code' box and select the activity from the menu	The activity will appear in the 'Referral Activity Code' box
6	Click in the 'Activity Date' box	A calendar will appear below the 'Activity Date' box
7	Click the date you want to select	The selected date will appear in the 'Activity Date' box
8	Click in the 'Activity' box	Type the activity you want to report
9	Click in the 'Description' box	Type a description and details you want to report about the activity
10	Click the blue 'Add Activity' button	'Successfully Saved Activity' will appear on the 'Monthly Progress Report Details' screen
On the 'Monthly Progress Report Details' Screen		
11	Enter any comments under the 'Add Comment' box	
12	Click the box stating 'I certify that all the services listed in this Monthly Progress Report were provided and	Checkmark will appear in the box

From the Referral Details Page		
	that they were provided with intentions of working toward or maintaining the DVR Customers employment outcome'	
13	Click the blue 'Submit' button	'Referral Successfully Submitted' will appear

How to Edit a Monthly Progress Report (MPR)

Edit a Monthly Progress Report if you need to add, edit, or delete activities or comments. MPR's cannot be edited after they have been approved.

From the Referral Details Page		
	Step	Action
1	Click in the blue 'View MPR' hyperlink under the 'View MPR' column	'View Progress Reports' screen will load
On the 'View Progress Reports' Screen		
2	Locate the referral record you want to edit. Click the details icon [pencil]	The 'Monthly Progress Report Details' screen will load
3	Make the necessary adjustments to the referral. Under 'Update Referral Status' at the bottom of the screen, change the referral status to 'Pending Acceptance'. Click the 'Submit' button	'Successfully Updated Monthly Progress Report' will appear at the top of the 'View Progress Reports' screen

How to Delete a Monthly Progress Report (MPR)

Delete a Monthly Progress Report if you entered it in error. MPR's cannot be deleted after they have been approved.

From the Referral Details Page		
	Step	Action
1	Click in the blue 'View MPR' hyperlink under the 'View MPR' column	'View Progress Reports' screen will load
On the 'View Progress Reports' Screen		
2	Locate the referral record you want to delete. Click the details icon [trash can]	A confirmation 'Are you sure you wish to delete this Monthly Progress Report' will load

From the Referral Details Page		
3	Click the 'Delete' button	'Successfully Deleted Monthly Progress Report' will appear at the top of the 'View Progress Reports' screen

Glossary

ES – Employment Specialist. The individual working with the consumer.

MPR – Monthly Progress Report. The contact, activities, and updates made to the VR Counselor about the consumer.

Consumer– The individual referred from Vocational Rehabilitation.