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Statewide Referral and Release of Information

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[– Oregon Employment First, supporting people with intellectual and developmental disabilities to work in community jobs. Learn more at iworkwesucceed.org.]

Angela Yeager: Hello, and welcome to the Oregon Employment First Podcast. I'm Angela Yeager with Employment First. This episode focuses on the statewide release of information and how it can be used to coordinate services or share information between Oregon social service agencies. Joining me today is Allison Enriquez, policy analyst with the Office of Developmental Disability Services, and Melissa Glover, coordinator of student services for Salem Kaiser Public Schools. Welcome to the show both of you.

Allison Enriquez: Thanks.

Melissa Glover: Thank you.

Angela Yeager: So, Allison, first question is for you. What exactly is the statewide referral and release of information?

Allison Enriquez: The statewide referral was developed jointly with partners from Oregon's Department of Disability Services, Vocational Rehabilitation and Education, and it should be used when a referral for ODDS or VR employment services is needed. Um, a referral document helps make sure that the connection with other agencies is made and that people don't get lost trying to navigate the systems. It's DHS Form 4130, and then the release of information can be used with the referral or as a standalone document when a release of information is needed, and we started to develop a multi-agency release as part of Oregon's Employment First initiative, um, collaborating too with VR education and DD and other partners, and in the middle of that work, um, 2017 legislation was passed

requiring that state social service agencies, um, develop a commonly-recognized statewide release that would be use when multi-disciplinary teams from social services agencies are working together to support mutual clients, um, and so as a result of that legislation, state social service agencies developed this statewide release which is Form 3010.

Angela Yeager: 3010, okay.

Allison Enriquez: 3010.

Angela Yeager: So, ideally, how should, um, the referral and release of information be used?

Allison Enriquez: So, the referral and release that can be used together as complimentary documents or they can be used separately if necessary. Um, the tools can be used to refer a person to ODDS, VR, or both agencies simultaneously. Um, the release can be used, um, for a person to decide up front at the point of referral that they want their teams to talk and share information, um, about them for the purposes of employment services. Um, state social service agencies including ODDS, VR, and education should now be using the statewide release when a release is needed for the interagency sharing of information. Um, it should also be used by, um, the contractors for these agencies, meaning case management entities and providers. Um, however, outside entities might not necessarily use the statewide release. Um, for example, healthcare providers sharing diagnosis information for eligibility purposes, they might have their own release of information, but many healthcare providers that accepted the DHS 2099 are also accepting the statewide 3010. Um, it is also important to note that the statewide release isn't specific for employment services. Um, state agencies should also be using, um, if a release of information is needed for interagency sharing of information for delivering other social services as well.

Angela Yeager: So, I was going to ask what the goal of the document is, but you sort of answered that, but I guess a better way to frame that question may be, um, is what is the problem or the issue you are trying to solve by creating this?

Allison Enriquez: So, the need for a commonly recognized form became apparent during Oregon's seamless transition pilot where

multiagency teams, um, VR, DD, and education were working together with their providers. They saw an increasing, they were increasingly serving mutual clients, students, um, and were needing a common agreed-to release of information. Um, local teams work together to develop a shared release, um, and then they ultimately asked state partners to develop a release that would be acknowledged by all the employment first agencies and would also be compliant with federal and state policy and laws regarding privacy and access to information.

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Angela Yeager: So, it's interesting it came out of education, an education project in a way –

Allison Enriquez: Mm hmm.

Angela Yeager: – seamless transition in this case, so this is a great segue to bring Melissa into the conversation. Um, so, Melissa, I know that you used this, um, the statewide release during the 2018-19 school year I believe it was. Um, so maybe you could discuss a little bit about what was helpful about the document.

Melissa Glover: Sure, so, we have, um, in Salem we have what we call a set team as our community employment transition teams, and so, we essentially meet weekly, um, to staff students and we meet with Marion County and Polk County their **** representatives and then employment providers and VR and it's a different team each week for a different groups of students, um, but really what we needed was we needed some flexibility to be able to talk to all of these people all at one time about a group of students so that we can really problem solve, um, transitioning them out of the school district, and so what we started doing was we started using this as a single form to be able to get consent to be able to share information back and forth with all of those people, um, because there were times when

we didn't necessarily know which provider would ultimately be working with the student and this allowed us to at these teams we can sit at a table with four or five different providers and the county and VR and talk about a student and talk about next steps, and at some point there was an easy handoff because we already had the ability to communicate around the students, um, with all the people there, and it created even some flexibility between different teams that were happening, so if there was a very unique situation we have some students who might be deaf and we needed to be able to connect around, um, supports for students who were deaf or hard of hearing, and so some providers have the capacity to do that right now, some don't, and so there was just different things that would come up that we would then be able to call another partner and just without having that fear of sharing information that we shouldn't as a school district, um, just to be able to do that without concern around that, and it did give us a great opportunity with our families to just be able to explain right up front at the beginning of the school year we're communicating with all of these people, we're really trying to do this seamlessly and make sure that there's a clear handoff when your child leaves us at 21 if they stay until 21. So, it helped us just to be able to explain to families what it was we're doing and share that we are talking with all of these providers and all of these, um, support services. So, it's been, it's been a nice tool for us. It has streamlined our paperwork process immensely.

Angela Yeager: So, in a real-world situation like this, and I'm just trying to give people that are listening an idea of this, um, so, for instance, five or six providers could be involved in conversations even though one only ends up ultimately working with that student –

Melissa Glover: Mm hmm.

Angela Yeager: – perhaps to do job development or whatever it may be, but, but you, but you're wanting to have conversations, you know, about the process with all of the folks involved –

Melissa Glover: Mm hmm.

Angela Yeager: – and so that's, is that kind of how you use the form and to get all those folks, you know, so you can share information about the student?

Melissa Glover: One hundred percent. It's, it, it creates, it allows for us to actually create a little think tank around a student, and so rather than just the specific people who work with a specific kid, we now have multiple people at the table who are very knowledgeable about just transition and what this world looks like, and so as we start brainstorming very specific cases, we have multiple voices at the table, we struggle because our school district is Marion County and Polk County, and so in any given classroom we have students from both counties, and so we wanted to make sure Marion and Polk were both represented at every single meeting that we had, but typically what I wouldn't have done is for an individual student who might have, uh, case management services through Marion County never would I talk to Polk County about that student. I wouldn't typically have a reason to, but then this way we just basically say these are the people who are going to be at the table. We would like your permission to be able to share information across, across everybody, um, and so it gave us that room to be able to talk about a student who might not be working with Polk County. They might be working with Marion, or vice versa, but we're not concerned about we're sharing information that we shouldn't be, because it was up front, this was who was at the table.

Allison Enriquez: Which is certainly was one of the goals of the 2017 legislation to develop the 3010 release of information, statewide release of information is acknowledging that clients are best served when we allow for those multidisciplinary, multiagency teams to all collaborate and work together and even staff individual level cases. Um, it, it's more efficient and effective for the person.

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Angela Yeager: How did this work for you then, Melissa, in terms of using this release **** in past documents?

Melissa Glover: Uh, waste mover, um, it, you know, what we previously had done was we had a single piece of paper for each, um, person, or each agency that we might be working with, but then services changed, they start working with us, and we would get confused, really, on who was this child working with now. Are they, you know, working with the county, do they have brokerage, or who's their VR counsel-, I mean, it was just

sometimes, it was a lot of confusion over who can we talk to and who can't we talk to, and now with this, we do have the ability to just call, I can call Marion County and say who's, who's working with this student right now, and we have this release and I can share that release and we feel comfortable about doing that. Um, so it's a single piece of paper, all possible entities, and it just allows for a really, all the barriers around communication were removed because we all feel very comfortable in being able to just reach out to each other, which was just not something that we used to feel.

Angela Yeager: Am I right in assuming then it's less paperwork then? Did we actually do something with the government that's less paperwork, 'cause you said a single piece of paper as opposed to maybe multiple releases –

Melissa Glover: Mm hmm.

Angela Yeager: – for different entities, right?

Allison Enriquez: Yeah, I mean, that's one of the goals, and hopefully another one of the goals is less duplication of services that, you know, it documents what experiences and, um, information already exists so that students don't have to go and replicate and repeat services once they're, um, out of school or when they're connected to VR or DD employment services, um, that, that they can get right into getting a job seamlessly.

Angela Yeager: So, Allison, is there anything else, um, that I didn't ask you about that you want to mention?

Allison Enriquez: I think we got most of it. I did want to mention where people can maybe go –

Angela Yeager: Yeah.

Allison Enriquez: – to access more information. Um, we do have a brief training online, um, on the ODDS IBD employment policy website. Um, we also have a workers' guide and some example templates that we'll be putting out. Um, the release tools are also posted on the VR and education websites. Um, you also can reach out to ODDS regional employment specialists or transition at work facilitators, um, that are based

throughout Oregon, um, and of course you can always contact us at Employment First.

Angela Yeager: Employment.first@state.org.us, and yes, the IBD policy page, um, which you can find at our website at iworkwesucceed.org, and then just click on policy on the left-hand tab, um, has a whole topic area called referral and release, and so under that topic you can find all the tools in that area.

Allison Enriquez: Yeah.

Angela Yeager: So, anything else you would like to add, Melissa, that I might have forgotten to ask about?

Melissa Glover: Nope. We're still using it this year, it's working well.

Angela Yeager: Great. Great, well, if there's nothing else on this topic, this has been the Employment First Podcast. Thank you, Melissa and Allison, for joining me, and we'll talk to you again next time.