

BUDGET-BASED ASSISTIVE TECHNOLOGY FUNDING

Procedure Flow

- . **1)** Individual and/or IDT member collaborates with other members of the team to identify AT needs and researches or trials various AT options, as needed.
- . **2)** The Case Manager presents the guardian/individual with a Secondary Freedom of Choice to select an Assistive Technology Purchasing Agent (PA) provider.
- . **3)** IDT member or therapist collaborates with other members of the team, to prioritize which AT item(s) to include on the Budget-Based AT application (AT-app) and to reach consensus as to whether the request(s) meet the requirements of the Budget-Based AT. When prioritizing purchases, it is important to consider the amount of the available budget. The maximum amount of money available for AT items and shipping and handling fees is no more than \$227.00. The balance of 10% (\$22.70) is paid as an administrative fee.
- . **4)** Individual and/or IDT member completes the Budget-Based AT-app, with the exception of information related to the Purchasing Agent (upper right block of pg. 1), and obtains all required ordering information. Assure that the application is signed and dated.
- . **5)** The Budget-Based AT-app and required AT ordering documentation are forwarded to the Case Manager. Documentation is required to be submitted if the requestor OR the purchasing agent will make the purchase. DO NOT send the app and AT ordering documentation directly to the Purchasing Agent.
- . **6)** The Case Manager completes the information related to the Purchasing Agent (upper right block of pg. 1) and reviews the Budget-Based AT-app for completeness and match with AT criteria. If the application is fine, the Case Manager provides their name, email, initials and date in the space in the upper right of page 1. If changes are needed, the CM returns the Budget-Based AT-app to the requestor for needed changes.
- . **7)** When the Case Manager determines that the AT-app is acceptable for submission, a budget is created, as follows:

Enter the AT Purchasing Agent and the total cost of assistive technology item(s) including shipping and handling charges plus 10% (reimbursement fee for the PA). No taxes will be paid. The sum of the cost of AT item(s), shipping and handling charges and 10% administrative fee may not exceed \$250.00 per ISP cycle.
- . **i)** Example #1: The AT items cost \$83.99. ☐The shipping and handling fees are \$25.00. ☐The sum of these charges is \$108.99. ☐The amount due to the Purchasing agent is \$10.90. The

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amount entered onto the budget worksheet is \$119.89.

- ii) Example #2: The AT items cost \$278.50. The shipping and handling fees are \$35.00. The taxes are \$22.28, but taxes may not be reimbursed. The sum of the AT, shipping and handling is \$313.50. However, the fund will cover only \$ 227.00 for cost of AT and shipping and handling and 22.70 for administrative fees. A supplementary funding source must be identified on the Budget-Based AT Application. That source must pay for \$63.80 above the funding limit.

The Budget-Based AT Fund may be accessed multiple times throughout the ISP cycle until the total annual allowable amount (per ISP cycle) of \$250.00 is reached. Remember this amount includes the cost of AT item(s), shipping and handling and 10% administrative fee.

8) The budget worksheet for purchase of Assistive Technology is submitted to the outside reviewer (OR). The OR reviews the request to assure that it meets the Clinical Criteria and when it does, transmits the approval to the TPA for data entry.

9) When the approved budget for AT is received by the CM, the following documents are forwarded to the Purchasing Agent for purchase or funding:

- Budget-Based AT Application and attached documentation,
- SFOC (required for first request and not after, unless another purchasing agent is chosen)
- Approved budget

10) When the authorization for billing is seen on the AT Purchasing Agent agency's Prior Authorization report, the purchase of AT items may be made, using the ordering information supplied with the AT Fund App and the documentation provided by the requestor. The Purchasing Agent makes shipping arrangements to the identified Delivery Address or sends a check to the requestor, as indicated on the application.

11) If the Budget-Based AT-app indicates that the check is to be sent to the Contact Person, that person is responsible to order/purchase the approved AT item(s) within 30 days of receipt of funding. The Contact Person will also be responsible for delivery of the AT items to the individual within 30 days of receipt.

12) If the Contact Person is responsible to order/purchase the approved AT item(s), that person must provide the AT Purchasing Agent with the associated receipts within 30 days following purchase of the funded items. Readable scans or copies of the receipts are acceptable.

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Procedure Flow

13) If purchased item(s) are used to fabricate or customized AT item(s), and those items are not ready for delivery within 30 days following receipt of the check, the Contact Person must contact the AT Purchasing Agent with an update every 30 days and upon delivery of the AT.

14) The AT Purchasing Agent will complete any requirements as noted in the DD Waiver Standards for “Assistive Technology Purchasing Agent.”