

# North Carolina Infant-Toddler Program Procedural Guidance

Reference: Assistive Technology Policy

## *Assistive Technology Loan Procedures*

### **Introduction**

These procedures are for the loan program outlined in the North Carolina Infant Toddler Program (NC ITP) Infant-Toddler Services Policy and Assistive Technology (AT) Policy. **The guidelines provided here are not meant to encompass all aspects of the policy or procedural guidance.**

The current **Loan Administrator of the NC Infant Toddler Program's Assistive Technology Loan Program** is: J. Iverson Riddle Developmental Center (JIRDC)/FIPP, 331 Enola Road, Morganton, NC 28655, Phone: (828) 438-6502, Fax: (828) 438-6503.

### **Procedures**

#### **1. Identification of Concern**

When a family expresses a concern about their child's development and participation in daily routines and activities, a functional outcome is developed. If the IFSP team agrees that some category of assistive technology may be needed by the child and family in order to achieve the established outcome(s), the exploration of assistive technology begins. The *Assistive Technology (AT) Framework* can be used as a guide for decision making when the IFSP team agrees that some category of AT may be needed by a child and family to achieve an established outcome.

#### **2. Assessment and Equipment Trial Loan**

Assessment and equipment trial loans occur while the IFSP team is in the decision-making process regarding assistive technology needs of the child and family. These loans are typically made to a service provider who is providing an early intervention service for the child and family or providing consultation to the IFSP team. The loan can be made to the family if the assistive technology will remain in the family's home for trials in daily routines. The 30-day timely service compliance timeline does not apply; however, requests for trial loans should be sent to JIRDC as soon as possible so that their staff can secure and deliver the requested AT devices in a timely manner.

- A. The process of assessment and trials must be included as activities to achieve specific outcome(s) on the child's *NC ITP Individualized Family Service Plan (IFSP)*.
- B. The EI Service Coordinator (EISC) completes the *NC ITP Assistive Technology Loan Request* form, as decided by the IFSP team for assessment and equipment trial, and submits the form via fax or email, which is encrypted or password protected, to JIRDC within **three** business days of activities being listed on the IFSP. The request form is to be completed on an AT device whether the device is housed at the CDSA's AT Library or at the AT Loan Program Library in Morganton.

- C. JIRDC personnel enter device name(s) and inventory number(s) on the *NC ITP Assistive Technology Loan Agreement/Return/Transfer Form* and provide requested device and loan agreement form to the EISC via fax or encrypted/password protected email. JIRDC has the right to substitute equipment if the requested piece is not available.
- D. EISC arranges for acquisition of the assistive technology device(s) by the provider or family and secures the provider's or family's initials and signature on the *NC ITP Assistive Technology Loan Agreement/Return/Transfer Form* acknowledging receipt of device(s). This form is available in Spanish.
- E. JIRDC is available throughout the length of the trial loan for technical support through the CDSA AT Contact.

### 3. Specific Device Loan Requires 30-Day Timeline

Once an assistive technology device is selected, after the assessment and equipment trial process, the device is added to the *NC ITP IFSP Service Delivery Plan* and made available to the child and family in a timely manner. The 30-day timely service compliance timeline applies for these loans.

- A. The assistive technology is listed on the *Service Delivery Plan* of the *NC ITP IFSP* and written parental consent for provision of the service is obtained on the *NC ITP IFSP Agreement or Review Section*.

**NOTE:** When adding assistive technology to the IFSP, listing the type or class of device (Example 1: AT/Augmentative Communication/Voice Output; Example 2: AT/Mobility/Gait Trainer) is recommended as opposed to listing the specific name or brand of the device.

- B. The EISC completes the *NC ITP Assistive Technology Loan Request* form for specific devices(s) and submits to JIRDC within **three** business days of parental consent on the IFSP.
- C. JIRDC personnel enter device name(s) and inventory number(s) on the *NC ITP Assistive Technology Loan Agreement/Return/Transfer* form and provide requested device and loan agreement form to the EISC via fax or encrypted/password protected email. JIRDC has the right to substitute equipment if the requested piece is not available.
- D. EISC arranges for acquisition of the assistive technology by the provider or family and secures the provider's or family's initials and signature on the *NC ITP Assistive Technology Loan Agreement/Return/Transfer* form acknowledging receipt of device(s). This form is available in Spanish.
- E. JIRDC is available throughout the length of the loan for technical support through the CDSA AT Contact.

### 4. Device Procurement Procedures

When the *NC ITP Assistive Technology Loan Agreement/Return/Transfer* form is received, JIRDC will determine the most efficient method of procuring and delivering the device(s) to the requesting CDSA. JIRDC has the right to substitute equipment if the requested piece is not available. This needed device may be:

- A. located at the requesting CDSA;
- B. located at another CDSA location; or
- C. shipped or delivered from JIRDC.

CDSAs will not be responsible for any fees associated with shipment of assistive technology or be expected to pick up/drop off AT devices. JIRDC will ensure that all devices leaving the facility will be clean, in proper working order and have batteries (if appropriate). If the AT device(s) is too large to mail, JIRDC will ensure delivery of device(s) in a timely manner.

Upon receipt of the assistive technology device, the requesting CDSA shall complete a final check to ensure that the device meets safety and cleanliness standards and includes batteries (if appropriate) prior to releasing the device to a family or service provider. The EISC will facilitate an inspection at the time of delivery of the device(s) by the family, who may request a notation be made about the condition of the device on the *NC ITP Assistive Technology Loan Agreement/Return/Transfer form*.

## 5. Families moving to a new CDSA catchment area

There are times when a family enrolled in the NC Infant -Toddler Program may move from one CDSA catchment area to another. If the family has loaned Assistive Technology that is part of the JIRDC inventory, please follow these procedures:

- A. If the equipment was loaned to a provider, the EISC informs the provider that the family is moving and discusses the timeline for the move. The EISC arranges for the return of the AT devices to the CDSA **or** arranges for the loan responsibility to be assumed by the family. The EISC must obtain the parent's signature on the *NC ITP Assistive Technology Loan Agreement/Return/Transfer form* if the family chooses to retain the device(s).
- B. The EISC notifies JIRDC of the family's move and the return or transfer of the AT loaned device(s) using the *NC ITP Assistive Technology Loan Agreement/Return/Transfer form*.
- C. The EISC documents accordingly through the IFSP process, in progress notes and communicates needed information regarding the AT device(s) on loan to the family to the receiving CDSA.

## 6. Return Procedures

Loaned devices should initially be returned to the CDSA originating the loan. Each CDSA will establish local procedures for processing loan returns, such as designating a location for loan returns and notifying the CDSA AT Contact or designee of the return. Within **THREE** business days of the return, the CDSA AT Contact or designee will send the *NC ITP Assistive Technology Loan Agreement/Return/Transfer form* to JIRDC, including:

- A. Device(s) returned including item name and inventory control number(s)
- B. Date returned to CDSA
- C. Condition of device:
  - Ready for Re-loan
  - Missing Parts
  - Needs Repair
  - Needs Extensive Cleaning
  - Damaged Beyond Repair
- D. Preferred Disposition of Device:

- Leave at CDSA
- Return to another CDSA
- Return to JIRDC

Upon return of the assistive technology device to the CDSA, JIRDC will determine most efficient method of returning the device to the proper location. The CDSA will not be responsible for any fees associated with shipping of the device(s).

## **7. Cleaning Devices and Safety Check**

JIRDC will provide cleaning cloths to CDSAs for the purpose of cleaning returned devices. The CDSA AT Contact will ensure that the returned device is cleaned prior to returning to inventory and should notify JIRDC in the event that a device requires extensive cleaning. The CDSA AT Contact should notify JIRDC in the event that there is a high rate of returns in a given time period. In this event, JIRDC will provide assistance to the CDSA to ensure the devices are cleaned.

## **8. Repair and Replacement of Device**

The CDSA AT Contact will notify JIRDC if a device requires repair. JIRDC will make arrangements to pick up the device for servicing, purchasing repair part(s) and/or contacting vendors for assistance. The AT Contact will notify JIRDC if device is unsafe for loan.

## **9. Confidentiality of Information**

JIRDC is considered a participating agency (any contracted agency that collects, maintains, or uses personally identifiable information (PII) to implement the requirements and regulations of IDEA Part C with respect to a particular child). Therefore the CDSA can disclose PII without parent authorization to JIRDC. Prior to sharing of information, the EISC must ensure that the PII being shared with JIRDC is on a need to know basis, specific to the child needing AT device(s), the parent(s) are informed of the communication between the CDSA and JIRDC, and the information to be shared is supported by the child's IFSP.

## **10. Exchange of Information**

Electronic communication is typically the most efficient way to communicate information between the CDSA and JIRDC. CDSAs and JIRDC must ensure that when communicating in any form, personally identifiable information (PII) for children and families is protected. The following procedures must be followed when sharing personally identifiable information to procure assistive technology loans from JIRDC:

- PII should never be included in an email subject line or body of an email.
- Encryption or password protection of all attachments is required if there is any Personally Identifiable Information (see below) in the communication.

As defined by Family Educational Rights and Privacy Act (FERPA), the term "*Personally Identifiable Information*" includes, but is not limited to:

- The child's name;
- The name of the child's parent or other family members;

- C. The address of the child or child's family;
- D. A personal identifier, such as the child's social security number, child number;
- E. Other indirect identifiers, such as the child's date of birth, place of birth, and mother's maiden name;
- F. Other information that, alone or in combination, is linked or linkable to a specific child that would allow a reasonable person in the community, who does not have personal knowledge of the relevant circumstances, to identify the child with reasonable certainty; or
- G. Information requested by a person whom the participating agency reasonably believes knows the identity of the child to whom the early intervention record relates.