



# Assistive Technology Inventory and Monitoring

## Introduction and Instructions

NM Developmental Disabilities Supports Division

Version I – 9/2013



# What is an AT Inventory?

- An accurate list of all current Assistive Technology (AT) used by an individual on an ongoing basis.
- The location of use for each item
- Who to contact regarding the item
- Dated comments regarding any changes



# Who must have an AT Inventory?

- Any individual receiving DDW services and using ANY assistive technology



# Why have an AT Inventory?

- The AT Inventory allows all AT items to be listed in one place.
- The AT Inventory helps everyone to know if AT items are available and working.
- Eliminates having to put this information in multiple places like:
  - ISP list
  - Therapy reports
  - Individual's personal inventory

# What does the AT Inventory Look Like?

## ASSISTIVE TECHNOLOGY INVENTORY LIST

Individual:

Date AT Inventory was Initiated:

| <b>Assistive Technology</b>  | <b>Location AT is Used</b><br>(indicate the locations AT is used in the shaded boxes below. Indicate with a check mark if AT listed in the 1 <sup>st</sup> column is used in this location) |  |  | <b>Contact Person</b><br>(refer to contact code at the bottom of the page) |
|--|---|--|--|--|
|  |   |  |  |  |
| Communication System<br>(Device, Mount, Switch)  |   |  |  |  |
| Environmental Control  |   |  |  |  |
| Mobility (wheelchair-describe removable parts. Walker, cane, gait belts, transfer equipment, etc.) |   |  |  |  |
| Alternative Positioning  |   |  |  |  |
| Mealttime  |   |  |  |  |
| ADL (bathing, dressing, oral hygiene, etc.)  |   |  |  |  |

# What does the AT Inventory look like?

| Assistive Technology  |     |    | Location AT is Used |  |  | Contact Person |
|---|-----|----|---------------------|--|--|----------------|
|   |     |    |                     |  |  |                |
| Other: <u>No</u> medical technology (i.e. enteral feeding equipment, mattress, bed, bedrails) and <u>No</u> home modifications (i.e. ramps, grab bars, items affixed to the home) |     |    |                     |  |  |                |
| Items   | yes | no |                     |  |  |                |
| Dentures/Partials   |     |    |                     |  |  |                |
| Glasses   |     |    |                     |  |  |                |
| Hearing Aids  |     |    |                     |  |  |                |
| Splints/Orthotics (if yes describe below)   |     |    |                     |  |  |                |
| Other (list below)  |     |    |                     |  |  |                |

To make changes to the list, the contact person should cross out item(s) that are no longer recommended or write in new items. Initial and date the change. Describe the reason for the change if necessary.

Contact Person Code: (if you are the contact person for any AT on this list, write your name and phone # next to a number below then enter that number in the contact code column of the form)

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_



# Timelines for the AT Inventory

- The initial AT Inventory must be developed by the 190<sup>th</sup> day following the Annual ISP effective date May 1, 2013 or after.



# Timelines for the AT Inventory

- Once it has been initiated, the AT Inventory will be reviewed and revised by the 190<sup>th</sup> day following the Annual ISP effective date during each year of service.
- AT that is initiated during the ISP cycle will be added to the Inventory when it is placed for ongoing use.
- AT that is placed for *trial use only* will not be included on the inventory.



# Who will develop the AT Inventory?

- Therapists and/or nurses will develop sections of the Inventory related to the specific AT items that they support.
- In the absence of a therapist/nurse who is responsible for supporting AT items, the IDT must identify another team member to take on this role. That IDT member(s) will develop those sections of the AT Inventory.



# How may the AT Inventory be developed?

- Those responsible for development of the AT Inventory may choose to circulate the document to one another to complete their respective sections until the document is finished.
- Those involved may also choose to meet face-to-face (6 month meeting?) or by phone to complete the AT Inventory or to plan for completion.
- The Case Manager should send reminders to IDT members involved to get the process started if needed.



# Distribution of the AT Inventory

- The final AT Inventory shall be sent to the Case Manager.
- The CM will distribute it to IDT members and to each provider agency where the individual uses AT.
- Provider agencies will assure that a copy of the AT inventory is available for monitoring in each applicable location.



# Agency Policies for AT Inventory

- As noted in the “Guidelines for the Provision of AT Services,” provider agencies are recommended to include maintenance of the AT Inventory in their policies.

<http://www.health.state.nm.us/ddsd/rules/TA/documents/ATGuidelinescci022006.pdf>



# Updating the AT Inventory

- Updates to the AT Inventory may be made by the Contact Person responsible for that piece of AT only.
- Updates will be made in ink, dated and initialed by the Contact Person directly on the copy at the site the AT is used.
- If the AT is used in more than one location the inventory must be updated at each location where it is used.



# Updating the AT Inventory

- Note that AT Inventories for employment or volunteer settings may not be available at the site of AT use.
- Updates should be documented within the Contact Person's next report to the IDT.



# Monitoring the AT Inventory

- There is a form to assist in monitoring AT. It is called the “AT Inventory Monthly Provider Monitoring and Action Form”.
- The provider agency for each location where one or more items of AT are used must identify a representative of that agency to monitor the AT Inventory.



# Monitoring the AT Inventory

- The agency must monitor the AT Inventory monthly.
- The agency monitor will report any AT supports needed to the contact person for that AT item.
- Battery replacement is the responsibility of the monitoring agency.
- The Contact Person identified on the inventory is responsible to take action to resolve any issues related to AT support.

# The AT Monitoring Form

**ASSISTIVE TECHNOLOGY INVENTORY MONTHLY PROVIDER MONITORING AND ACTION FORM**

**Individual: Jason Black**

**Location of Monitoring: Jason's House**

**Note: PROVIDER-PLEASE REFERENCE THE AT INVENTORY LIST WHEN COMPLETING THIS FORM**

| Date            | All AT Items are Available | All AT Items are Working | List any AT Items that need attention | Describe issues for each item listed in previous column (needs repair, lost, needs battery, etc.) | Action:What is being done and who is responsible | Signature    |
|-----------------|----------------------------|--------------------------|---------------------------------------|---|--|--------------|
| <b>Examples</b> |                            |                          |                                       |   |  |              |
| 9/12/13         | X                          | X                        |                                       |   |  | Joanne Jones |
| 10/14/13        |                            |                          | Voca                                  | Needs repair  | Contacted SLP                                    | Joanne Jones |
|                 |                            |                          |                                       |   |  |              |
|                 |                            |                          |                                       |   |  |              |
|                 |                            |                          |                                       |   |  |              |
|                 |                            |                          |                                       |   |  |              |
|                 |                            |                          |                                       |   |  |              |
|                 |                            |                          |                                       |   |  |              |
|                 |                            |                          |                                       |   |  |              |



# Resources

- The following documents are available on the Clinical Services Bureau website:

[www.nmhealth.org/ddsd](http://www.nmhealth.org/ddsd)

Click on the CSB link on the right side of the page. Go to the “Resources/Assistive Technology” section.

- Assistive Technology Inventory List
- Assistive Technology Inventory Monthly Provider Monitoring and Action Form
- Assistive Technology Inventory Instructions



# Questions?

Feel free to contact your Regional Office AT Liaison:

Metro – [Ellen.Hardman@state.nm.us](mailto:Ellen.Hardman@state.nm.us)

SE – [Lisa.Lollis-Garcia@state.nm.us](mailto:Lisa.Lollis-Garcia@state.nm.us)

SW – [Randall.Cahall@state.nm.us](mailto:Randall.Cahall@state.nm.us)

NW – [Allison.Byrnes@state.nm.us](mailto:Allison.Byrnes@state.nm.us)

NE – [Suzanne.Welch@state.nm.us](mailto:Suzanne.Welch@state.nm.us)

Or you may contact the Clinical Services Bureau for further assistance. Ph. (505) 841-5878.

• [felicia.vidro@state.nm.us](mailto:felicia.vidro@state.nm.us)