

North Carolina Infant-Toddler Program

Assistive Technology Loan Agreement/Return/Transfer

Instructions

Purpose: These forms are used by the CDSA to confirm receipt of loan assistive technology by families or service providers and to document and notify the loan administrator of the return or transfer of an AT loan.

Instructions: **Send the completed forms (follow instructions below) to the AT Loan Administrator by email as an encrypted or password protected attachment or fax. The original forms are maintained in the appropriate section of the Child's Infant-Toddler Program records.**

Loans:

- The loan administrator will enter the child's name, date of birth, inventory number (Inv. #), name of device (Item) and value (Item) on the form. The form will be sent electronically to the requesting CDSA.
- The CDSA records the date when the assistive technology was received by the CDSA and the date when the device was delivered to the family or service provider.
- Comments on the condition of the device can be documented next to the item description at the top of the form at the time of delivery of the loan.
- In the section outlining responsibilities, the person (provider or family member) responsible for the loan should initial each item in the designated section and sign and date the form at the bottom.
- If the loan is to the service provider, then the provider agency information should be completed.
- Parent's and/or provider's initials and signatures on the form acknowledge understanding and agreement with the terms of the loan. A copy of the form is provided to the person who signed as responsible for the loan.

Returns and Transfers – use the form “AT Loan Returns/Transfers - CDSA USE ONLY”

Returns:

- This form is to be completed when loaned AT item(s) are returned by a provider or family to the CDSA.
- The person responsible for completing the loan (EISC or AT Contact) enters the child's name and date of birth at the top of the page, then fills out the return section for each item:
 - Complete the date, EISC name, name and title of person completing the form and the name of CDSA.
 - Enter the Equipment Name and the Item #.
 - Complete the “Safety Check/Condition of Equipment” section. Include parts needed, if applicable.
 - Complete the “Preferred disposition of equipment” section.
 - Add any additional comments in the box below and have the AT Contact review the return form and sign it.
- If items are returned at different times, then the person handling the return completes the information for the additional items being returned.
- Any damage or notification of loss/theft should be documented in the Additional Comments section. If a replacement item or part is needed, this also needs to be documented.

Transfers:

- The “CDSA Transfer Notification” at the bottom of each page is to be completed by the EISC from the sending CDSA when a family moves to a new CDSA catchment area and the child will remain enrolled in the NC ITP. All AT equipment currently supported by the IFSP is to be transferred with the child.
- The person responsible for completing the transfer section (EISC) checks off what equipment is being transferred with the family when moving to a new CDSA catchment area and enters the date of transfer.
- The EISC enters the date of transfer, the name of the receiving CDSA (the name of the CDSA catchment area where the family is moving to), name of the new EISC, and any comments regarding the transfer. The EISC should inform the new EISC of the AT equipment as part of the transfer information.
- The EISC submits the Return/Transfer form with the Transfer section completed to JIRDC within three (3) days of being notified that the child is moving to another CDSA. A copy of the AT Loan Agreement and the Return/Transfer forms should be included during the transfer process, per the Record Transfer Procedures.
- JIRDC forwards a copy of the form to the new CDSA's AT Contact to inform him/her as to what AT equipment the child has.

Disposition: **Infant-Toddler Program records, including financial and automated information, must be maintained based upon the ITP's record retention policy. Records must be archived in accordance with ITP and state requirements to ensure their preservation for the required length of time.**