



The Roles, Rules, and Strategies of Funding Assistive Technology

Have you ever tried to find funding for a piece of adaptive equipment or an assistive technology device?

If you are like most people you probably found it to be a frustrating experience. We have found that people who are successful in getting funding know:

- There are people with key **roles**,
- There are "**rules**",
- There are **strategies**.

People often overlook certain funding sources for lack of information, or they give up the idea of purchasing a service or item due to its high cost. There are public agencies that offer funding. You could be eligible for funds from one or more of them, even if you have been denied funding by other agencies.

Now, let's examine the basics of funding.

The Goal

To obtain financial assistance for your assistive technology needs.

The Roles

You, the Consumer:

You may be eligible for public or private funding; however, *you must be persistent in seeking funding.*

Funding Coordinator:

You, or a person of your choosing, who gathers funding information and prepares funding applications. This should be a person close to you, dedicated to finding you funding, and someone who understands your needs. It could be a parent, sibling, friend, provider, or vendor. Many vendors are experienced in assisting in the funding process. Selection of a funding coordinator should be done before applying for funding.

Professionals and Advocates:

Other people who know your physical, social, and safety needs, such as doctors, teachers, physical therapists, occupational therapists, speech language pathologists, advocacy group members or support group members.

Agencies or Programs (funding sources):

Organizations that have funds, process applications for funding, and award funds to qualified applicants. Public programs are divided into three main categories: medical, educational, and vocational/employment. There are private programs that also offer funds, try these if you are ineligible for public programs. Some examples of funding sources include:

Funding Category	Medical	Educational	Vocational/Employment	Private
Funding types	Private insurance, Medicare, Medicaid	Special education	Vocational rehabilitation	Community service groups

Agency Contact:

A representative of the funding agency. The funding coordinator should attempt to speak with the same agency contact each time they call or visit.

The “Rules”

These "rules" are not carved in stone and should be used as a guide to obtain funding.

Rule 1: Eligibility Requirements

The funding coordinator must obtain information on eligibility requirements; you may or may not be eligible for funding. Some examples of requirements include:

- You must fit the definition of the population served by the agency.

- Rejection by other programs (e.g., to qualify for some waiver programs under Medicaid, you must be ineligible for Supplemental Security Income.)

Rule 2: Terminology

Each funding agency has its own service goals and therefore its own definition of demonstrated need. You must present your need in a way that fits with the agency's definitions and terminology. For example, medical sources may require terms such as ***medical necessity*** or ***basic medical need***. Educational sources may look for ***integrate*** and ***perform***, and vocational programs may prefer ***productivity*** and ***self-sufficient***.

Rule 3: Negotiation

Part of the funding process is learning how to negotiate with the funding agency. There should be ongoing dialogue between the funding coordinator and the agency contact, to come to the same understanding of need and use the same terminology.

Rule 4: Documentation

The funding coordinator should keep track of all correspondence and phone conversations. The funding coordinator should take notes—there will be important information or contact names to remember. The date and time of all phone calls should be recorded. The funding coordinator should keep a file or notebook with all this information.

Rule 5: Do not be discouraged by rejection

The reasons for rejection should be explored. Sometimes the problem can be fixed easily. In some cases, you may have to be ineligible for one program to be accepted by another.

The Strategies

Now that you know the roles and rules and have selected a funding coordinator, it is time to figure out your strategies. The strategies are a general guide to the process of obtaining agency funding for assistive technology. The examples given do not describe everyone's situation, and the lists of sources do not cover every program. However, the strategies are presented as steps to help you and the funding coordinator to plan the search for information and to know what to expect when applying for funds.

Step 1: Contact Easterseals Iowa Assistive Technology Program to Explore Options

If you are an Iowa resident, contact Easterseals Iowa Assistive Technology Program at **1-866-866-8782 or 1-515-289-4069 (TTY)**.

Easterseals Iowa Assistive Technology Program (ESI ATP) is a great source of free information about assistive technology devices and resources as well as funding programs. For now, ask ESI ATP to determine the programs that may give you funding. There are four main categories of funding sources: medical/health programs, educational programs, vocational/employment-related agencies and private organizations. This step will weed out the agencies and programs that will not work for your situation. ESI ATP can also provide you with information about advocacy groups and peer support groups.

Step 2: Obtain information about eligibility requirements

All agencies and programs have different eligibility requirements. It is the funding coordinator's task to obtain the eligibility requirements by contacting the funding source and the advocacy group provided by Easter Seals Iowa Assistive Technology Program (see Step 1).

Step 3: Request and collect the documentation consistent with eligibility requirements

Gather the papers and records necessary to prove your eligibility. If the information you received from the funding agency does not make clear what records you need, call them back and ask for a list. Many of these papers will be letters from professionals explaining how long they have known you and why you need the assistive technology you are requesting. Some professionals may need to be alerted to the requirements and terminology of the agency.

Step 4: Review the Documents and Submit Funding Request

Review the documents with the funding coordinator, advocacy group member or professional; make photocopies of all documents; and submit your request for assistance to the agency.

Be sure to ask the agency how long it might be until you get a reply. If you do not hear from them in that time, you or the funding coordinator should make a follow-up call to your contact at the agency.

Step 5: Review your Application and Appeal if Denied

If your application is denied, be sure to review the application process with your funding coordinator and agency contact to determine why your application was denied.

Some applications are denied when the information supplied is incomplete or inconsistent. Contact Easterseals Iowa Assistive Technology Program for the names of advocacy groups that may be able to assist you. If your application is in the correct order and you are still rejected, your next step is to appeal the decision.

An appeal is a written protest of rejection that attempts to prove why your application for assistance should be accepted. Each public funding source (except private sources) has its own legal and administrative procedures for appealing a decision. Be sure to find out what the process is from the agency contact or advocacy group. Seek their help in the appeal process. You may have to appeal more than once.

Step 6: Approach other funding sources and begin again with Step 2

Exhaust all options for public funding from medical, educational, and vocational programs. Then approach private organizations.

These steps do not guarantee that you will be eligible for funding, but greater persistence does increase the chances of obtaining funding. Here is a review of the process:

1. Call Easterseals Iowa Assistive Technology Program to discover your possibilities
2. Contact the agency and ask about eligibility requirements
3. Request and collect the documentation required
4. Review the documents, make photocopies and submit application
5. Resubmit corrected application; if rejected, appeal
6. Approach other funding sources

And remember, you will not get funding unless you apply for it. Good luck!

The Easterseals Iowa Assistive Technology Program is made possible through funding from the Center for Disabilities and Development at the University of Iowa Health Care supported by the State AT Program grant from the U.S. Department of Health and Human Services Administration for Community Living. Its contents are solely the responsibility of the authors and do not necessarily represent the official views of the Administration for Community Living or HHS.

Text is adapted, with permission, from an Independent Living brochure series produced by the Health and Welfare Department of Canada.