

# Assistive Technology Purchasing

## NC DIVISION OF SERVICES FOR THE BLIND POLICIES AND PROCEDURES VOCATIONAL REHABILITATION

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**Title:** Assistive Technology Purchasing  
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Examples of assistive technology which DSB may purchase for eligible consumers include:

- Computers and adaptive software as recommended by Assistive Technology Consultants (ATC), the Rehabilitation Engineer or the RCB Technology Teacher.
- Tablets and smart phones as recommended by Assistive Technology Consultants (ATC) or the Rehabilitation Engineer.
- Low tech devices such as color identifiers, large print devices, etc. as recommended by Independent Living Rehabilitation Counselors or Rehab Center for the Blind (RCB) staff
- Mobility devices such as electronic travel aids as recommended by Certified Orientation and Mobility Specialists
- Assistive listening and alerting devices as recommended by Deaf Blind Specialists (see the Deaf-Blind Services policy for more information)
- Computers and adaptive software as recommended by Assistive Technology Consultants (ATC), the Rehabilitation Engineer or the RCB Technology Teacher.

Devices may also be purchased when recommended by external sources when those sources have comparable qualifications to the above named roles and when the purchases are allowed by policy. See the Assistive Technology Services policy for more information.

### General guidelines

- Consumers must be in status 18, 20 or 22 to be eligible for the purchase of assistive technology.

- Prior to purchasing new equipment, the VRC will confirm that suitable, comparable equipment which will allow the consumer to effectively meet their goals is not already available to the consumer.
- The purchase of assistive technology equipment is not subject to economic need. The individual, however, must be working toward a competitive, integrated employment goal that requires specific technology to attain, regain or maintain employment and have the capacity to use the equipment. This applies to the purchase of low and high tech devices.
- All equipment purchased by DSB remains the property of the Agency until such time as the Agency releases it.
- All recommended purchases require documentation by qualified staff of current skill levels of the individual in relation to use of the device and the functional need for the device.
- When available, warranties may be purchased for assistive technology equipment when recommended by a qualified staff member.

### **Computers**

- The Assistive Technology Consultant or Rehabilitation Engineer completes the DSB Consumer Computer Purchase Recommendation form and provides it to the Vocational Rehabilitation Counselor. This form is forwarded to the DVRS Purchasing section by fax, mail, or encrypted email.
- Justification for Sole Source and/or Waiver of Competition must be submitted to and approved by DVRS Purchasing, when relevant.
- A formal bid process will be completed by DVRS State Purchasing.
- When the bids are received, DVRS State Purchasing will forward them to the AT Consultant for verification that the bids meet the required specifications.
- DVRS State Purchasing notifies the case manager of the awarded vendor and the price quote for the item(s).
- The case manager completes the plan entry, obtains all signatures required including the consumer signature and then notifies DVRS Purchasing.
- The case manager and supervisor approval is required on the authorization.
- DVRS Purchasing creates the purchase order outside of BEAM and issues it to the awarded vendor.

- Also see section on “Computers Purchased through Colleges and Universities”.

### **Equipment and Computer Use Agreement**

- When a computer is purchased, the VRC will prepare and distribute the agreement DSB-4016-VR Equipment and Computer Use Agreement with instructions for use of equipment.
- Small items valued at less than \$500.00 will not be listed on the fixed asset inventory but a record of the equipment issue will be maintained through the Verification of Items Received as confirmation of receipt of the item(s).
- The equipment must be reviewed at the time of case closure. If at this time, the equipment is being used for the intended purpose and the employment is satisfactory and stable, the ownership of the equipment may be turned over to the individual.
- Both the Vocational Rehabilitation Counselor and individual will sign the transfer of ownership of equipment portion of the DSB-4016 Equipment and Computer Use and Agreement and distribute form copies according to form instructions.
- If there are questions as to the appropriate use of the equipment under the IPE, or if the equipment or any part ceases to be used by the individual in connection with the occupation or training, then the equipment or the part not used should be returned DSB.
- Purchases of computers through the colleges and universities for eligible individuals are granted an exception to State Purchasing and Contract Rules. See Purchasing Procedures for more information.

### **Mobile devices**

- Note that where policy allows for the purchase of a mobile device, consumers are only eligible for the purchase of one mobile device. Eligible consumers may receive either a tablet or a smart phone but not both.
- Models of purchased mobile devices may be no newer than one generation earlier than the most currently available model.
- In almost all cases, upgraded devices will not be purchased. See Replacement of Equipment below for more information.
- Mobile device apps may allow individuals to accomplish the same tasks as other types of adaptive aids. Purchases for devices which allow the individual to achieve the same functional task may not be duplicated. For example, if an individual has a mobile device with a color identifier app the consumer is not eligible to also receive a standard color-identifier.

- At the time the mobile device is provided, devices must be equipped with tracking apps (ex: find my iPhone) so that if the device is lost or stolen, the equipment can be tracked.
- Peripherals such as keyboards and earbuds may be purchased when needed to effectively utilize the device.
- All mobile devices should be purchased with a protective case capable of withstanding being dropped. The device should be inside of its case at the time of delivery to the consumer. Consumers should be advised that the device must be maintained in the case.
- The Division may purchase apps which are required for achieving postsecondary, career training or vocational goals on their Individualized Plan for Employment. The purchase of the app must be recommended by a qualified staff member who determined the individual is able to utilize the recommended device and must be able to receive any necessary instruction to utilize it. The VRC will purchase an app store card, for example an iTunes or Google Play card, in the exact amount needed to purchase the recommended app(s). Division staff will utilize the app store card to install the app(s) on the consumer's mobile device. The Division retains possession of the app store card until the approved apps are installed.

## **Repairs**

When dealing with broken or malfunctioning equipment, the VRC should first review whether the item is covered under a warranty, and if so, pursue the repair via the manufacturer's warranty. In cases where the warranty is not in effect, the Assistive Technology Consultant or the Rehabilitation Engineer should be consulted on broken equipment prior to sponsoring repair costs. The ATC or Rehabilitation Engineer may be able to troubleshoot and repair the equipment and/or may advise the VRC whether repair of the equipment is practical. Equipment repairs may be sponsored if such repairs are required in order to complete the rehabilitative program. At the time of closure, the consumer assumes responsibility for any needed equipment repairs.

Vocational Rehabilitation Counselors should secure at least two quotes on repairs estimated to be under \$500.00 and may approve such repairs. Repairs estimated to exceed \$500.00 should be purchased through the bid process. Vocational Rehabilitation Counselors should be aware of the cost of the repairs in relation to the value of the equipment being repaired. At the closure of the case, DSB will turn over the ownership of the equipment to the individual if the employment is satisfactory and it appears that the employment will continue. At the conclusion of the case, the consumer becomes responsible for future repairs.

## **Replacement of Equipment**

### **Broken equipment**

Under specific conditions outlined in this policy, broken equipment may be replaced up to a maximum of one time. Equipment which cannot be repaired may be replaced only if the device is a critical part of achieving vocational or educational success and the consumer demonstrates the ability to effectively care for the device. The broken equipment must first be returned to the VRC regardless of its condition. The Division will first determine if the equipment can be repaired in a cost-effective manner before considering replacing the equipment. If the device can be effectively repaired a replacement will not be purchased.

### **Lost or stolen equipment**

Equipment which has been lost or stolen may be replaced if specific conditions are met. The Vocational Rehabilitation counselor who receives information or evidence of lost or stolen State owned equipment shall as soon as possible, but not later than three days from receipt of the information, report such information to his/her immediate supervisor utilizing the North Carolina State Bureau of Investigation Incident Report ([SBI-78 State Property Incident Report](#)). The District/Area Supervisor shall in turn forward the completed report to the Division Director. The Division Director shall, within a reasonable time but no later than 10 days, forward the report to the Director of the State Bureau of Investigation. (NCGS 114-15.1) The Vocational Rehabilitation Counselor should keep a copy of the report in the individual's case file. The Vocational Rehabilitation Counselor may authorize replacement of the equipment if a written justification is in the case file and the purchase is approved by the District or Area Supervisor.

### **Upgrades**

In most circumstances, individuals are not eligible for the purchase of newer versions of devices or newer types of devices that would replace existing equipment which meets the functional needs of the consumer in relation to their planned goals. Although newer versions may contain desirable features, the Division cannot sponsor the purchase of newer technology which is not essential to meeting the vocational or educational goals of the consumer. Exceptions may be made under the following conditions,

- A device which is needed to achieve planned goals becomes phased out by the manufacturer and is no longer supported. This determination needs to be made by the AT Consultant with specific information on why the product can no longer function in the manner needed and what technology is needed to allow the achievement of planned goals.
- Voice controlled personal assistants (Siri, Cordana, Echo) are currently a common feature of tablets and are more than a convenience for visually impaired and blind users. These voice activated technologies give some Division consumers opportunities to access mainstream technologies to effectively meet their goals by allowing voice dictation and simpler navigation of the device in significantly less time

than using built in accessibility options alone. Therefore, when a consumer already owns a tablet from a product generation which did not contain a voice controlled personal assistant, a newer version of the product may be purchased by the Division if other eligibility criteria are met.

### **Repossession of Equipment**

The VRC may authorize the repossession of equipment purchased for the consumer under the following conditions:

- The equipment has been utilized in a way that endangers the safety of the consumer or others
- The equipment has been abused or improperly cared for
- The consumer has attempted to sell the equipment
- Friends or relatives, including children, have been allowed to use the equipment
- Additional software or hardware has been installed on a computer without prior Division approval

### **Returned Equipment**

Division staff will notify the District/Area Vocational Rehabilitation Supervisor and the Deaf Blind Assistive Technology Program Specialist (DBATPS) when equipment costing more than \$500.00 is repossessed or returned to the Agency. The Deaf Blind AT Program Specialist will maintain the AT Inventory List with returned and donated items. An updated list will be made available to staff on a quarterly basis.

Returned equipment may be permanently reassigned to another consumer under the following conditions:

- Equipment initially purchased by a specific program should be assigned to another individual served by the same program. Therefore, a VRC will only assign equipment to VR consumers where the device was initially purchased by the VR program.
- Equipment should not be permanently assigned simply because it is available. The equipment should only be permanently assigned after a qualified staff member determines the piece of equipment is the most suitable device for an individual to achieve planned goals.
- The transfer of equipment should be documented in the case record and the individual receiving the reassigned equipment should sign the Verification of Items Received form using the online dsb-0950-ia form. "Equipment Transfer" should be recorded under Authorization # on form dsb-0950-ia.
- The District/Area Vocational Rehabilitation Supervisor and the Deaf Blind Assistive Technology Program Specialist (DBATPS) should be informed that the equipment has been permanently reassigned to a qualifying consumer.

### **Technology for Employment**

- Equipment may be purchased for employment if it is required but not provided by the employer, including those who are self-employed.

- The equipment must be usual and customary for the individual's vocational goal and will be used by the individual towards completion of the IPE; or there must be a documented reason why the specific AT is needed to lead to a successful vocational outcome.

### **Technology for Post-Secondary Education**

Equipment may be purchased for college if it is required but not provided by the educational institution if all of the below conditions are also met.

- College students must be enrolled in two or more courses equal to 6 credit hours or more which require use of the equipment and must remain enrolled in at least 6 credit hours of courses in subsequent years to retain the equipment.
- The individual must have the knowledge to use the device or the ability to be trained in use of the equipment and provision of the training must be part of the IPE.

### **Technology for Temporary Work Assignment**

- Devices needed to be successful in a temporary work assignment may be purchased by DSB and loaned to the individual for the duration of a temporary position if the position is related to the individual's employment goal as stated on the current Individualized Plan for Employment
- Eligible individuals who require technology to successfully perform temporary employment tasks should have their needs assessed prior to beginning the temporary work assignment. Any unanticipated needs which arise after beginning the temporary assignment will be assessed as soon as possible to ensure success.
- Once the technology is received and delivered, the VR Equipment and Computer Use Agreement will be completed. The agreement is to be placed in the individual's case file and/or scanned into the case management system.
- Any needed instruction on the equipment should be provided at the soonest opportunity to allow the individual to successfully utilize it.
- Once the temporary position ends, all technology is to be returned by the individual to the vocational rehabilitation counselor. However, if the temporary position results in a permanent position where the technology is still needed and the employment results in a successful outcome, ownership of the equipment may be turned over to the individual.
- Any requests for exceptions should be directed to the Chief of Rehabilitation Field Services.

### **Technology for Work Experiences**

Individuals who require technology to successfully perform on work experiences should have their needs assessed prior to begin the work experience. Any unanticipated needs which arise after beginning the work experience will be assessed as soon as possible to ensure success with the experience. Devices needed for a successful work experience may be purchased by DSB and loaned to the individual for the duration of the work experience.

## **Video magnification**

- Video magnifiers may be pursued only after the Nursing Eye Care Consultant (NECC) or Low Vision Program Specialist (LVPS) have determined the individual cannot meet their goals effectively with low vision techniques or lower cost devices such as optical devices.
- Evaluations are conducted by the NECC, LVPS or RCB Technology Teacher. To purchase a video magnifier, the staff member completing the evaluation must submit form DSB-2007 Evaluation with Video Magnification to the VRC. This form must include the reason(s) why optical devices, or optical devices alone, could not be used to achieve the planned goals. Additionally, the functional tasks the video magnifier is required for must be noted.
- In cases where when the NECC, Technology Teacher or LVPS cannot be available in a timely manner to meet the individual's training or employment need the individual may instead be evaluated by the AT Consultant or Rehabilitation Engineer. The need for the alternative assessor should be documented in the case record.
- In cases where the device connects to a computer or when the home or workspace must be modified the evaluation needs to be completed in whole or part by the AT Consultant or Rehabilitation Engineer. The need for the alternative assessor should be documented in the case record.
- Reasonable effort must be made to demonstrate three different units, preferably from different vendors, which may meet the individual's needs. Where there are not three units which address the individual's specific needs, the most comparable units must be demonstrated.
- The monitor size should be selected based on the individualized needs of the consumer considering the eye condition, the individual's visual functioning, tasks to be completed and available space for the device.

## **PURCHASING PROCEDURES**

Individual purchases can be made from any vendor and are not governed by State Term Contract pricing with the exception of printers and faxes which should be made via a State Term Contract Vendor All vendors must be in the North Carolina Accounting System (NCAS). Go to <http://eprocurement.nc.gov/index.html> for more information on State Term Contracts or locating registered vendors.

Vocational Rehabilitation Counselors approve what purchases may be made based on qualified recommendations and according to policy. The VRC will compile the following



support documentation for District/Area Supervisors for review and approval for purchases over \$500.

- Copy of the evaluation with recommendations/specifications
- Vocational Rehabilitation Counselor's letter of justification for items costing more than \$500
- If a single source vendor is being requested as a computer purchase through a college or university that provides an avenue for purchase, a complete justification must be supplied to explain why the special package is needed, the needed interface required for this equipment, or any other special circumstances.
- When approving equipment in employment situations, the Vocational Rehabilitation Counselor must provide the following information:
  - The status of the employment (paid, internship, work experience, etc.)
  - Assessment of the individual's financial eligibility;
  - A list of past technology purchases for the individual and how these items are used;
  - Participation of the employer in provision of the required equipment (DSB purchase to include entire package, only assistive devices, etc.)
- When approving the equipment for training situations, the Vocational Rehabilitation Counselor must provide the following information:
  - A list of past technology purchases for the individual and how these items are used;
  - Participation of the training facility in provision of the required equipment (DSB purchase to include entire package, only assistive technology devices, etc.)

### **Aids and Appliances Unit**

Aids and Appliances carries a range of low cost items which may be purchased by individuals who are blind or visually impaired or by DSB authorization for eligible consumers. Aids and Appliances sell items at cost plus shipping and state tax.

To purchase from Aids & Appliances via authorization follow these procedures:

1. An authorization is prepared and signed by the Vocational/Independent Living Rehabilitation Counselor.
2. The Vocational/Independent Living Rehabilitation Counselor will send the authorization directly to Aids & Appliances
3. Aids & Appliances will sign the authorization and the equipment/supplies will be shipped to the Vocational/Independent Living Rehabilitation Counselor along with the authorization and invoice.
4. The Vocational/Independent Living Rehabilitation Counselor verifies receipt of the equipment/supplies by writing "Received" on the invoice, signing and dating.
5. The Vocational/Independent Living Rehabilitation Counselor will send a copy of the signed authorization and signed and dated invoice to DSB Claims Processing for payment.
6. The Vocational/Independent Living Rehabilitation Counselor will promptly deliver the equipment/supplies and obtain a DSB 0950 Verification of Items Received form from the applicant or eligible individual that must list the delivered items, be signed by the individual, dated at the time of delivery and placed in the individual's case record attached to the authorization.

### **Computers Purchased through Colleges and Universities**

Computers purchased through colleges and universities for eligible individuals are granted an exception to State Purchasing and Contract rules for purchase of computers. Purchases of computers through the [colleges](#) and [universities](#) is authorized under G.S. 143-53b, which is the special provision for the purchase of goods and services for persons with disabilities. This statute allows for purchases outside of certified sources of supply and competitive bidding when a single source can provide multiple pieces of equipment, permits priority consideration for vendors who have the expertise to provide appropriate and necessary training for the user's equipment, permits priority consideration to suppliers offering the earliest possible delivery date of goods or services and allows consideration for the convenience of the provider's location for the individual with the disability.

Colleges and universities that provide an avenue to purchase computers are convenient to the [eligible individual](#) and the school will support the school-purchased computer. In most cases the school will load or have loaded all of the software required by the college or university and will provide training, if needed. If the computer breaks, the college or university will repair the system or send it back to the company for repair and give the eligible individual a loaner. When a computer is purchased from another source, the consumer must independently load the software or find support on their own. Therefore, when required or needed, computers may be purchased through the

college or university where the student is enrolled. Justification for this decision should be documented in the case file.

The Agency will view the purchase of a computer through the college or university as a single source purchase. Most equipment purchased will be covered by the guidelines in this policy under Purchasing Procedures Based on Cost - "Cost of at least \$500 but less than \$2,000."

### **Purchasing Procedures Based on Cost**

Below are purchasing procedures according to cost which are in accordance with State Purchasing and Contract rules. These procedures pertain to the purchase of equipment including the purchase of equipment including durable medical equipment.

#### Equipment Available on State Term Contract

**Durable** medical equipment (DME), as defined in the Social Security Act, is equipment which can withstand repeated use, and is primarily and customarily used to serve a medical purpose, and generally is not useful to a person in the absence of an illness or injury, and is appropriate for use in the home. **A prescription is required to purchase durable medical equipment.** DME that is included in a home modification project such as a tub bench or shower chair does not require a prescription for purchase. The cost of DME needed for a home modification project should not be included in the home modification quote and should be processed separately.

The Division is required to use state term contract vendors for the purchase of durable medical equipment. If the equipment is not available on state term contract, bids or quotes must be obtained regardless of the cost of the item. Justification to purchase off contract should be submitted with the client purchase request to DVRS Purchasing for approval.

#### **Cost < \$2,500 (including shipping, handling and set-up charges):**

- The state term contract quote is obtained outside of BEAM
- Service is entered on the plan
- Supervisor approval is not required on the authorization
- Authorization issued to the state term contract vendor

#### **Cost ≥ \$2,500 but < \$25,000 (including shipping, handling and set-up charges):**

- Justification documentation is entered in the client's ECF in BEAM that includes justification statement regarding the client's need and use for the equipment, financial eligibility and comparable benefits applied if applicable in addition to the specialists' assessments and equipment request forms with the equipment specifications
- The state term contract quote is obtained outside of BEAM
- Supervisor reviews the quote and justification packet
- Supervisor notifies the case manager of approval to proceed outside of BEAM

- Plan entry is completed, authorization created and Request for Quotes (RFQ) form completed
- Supervisor approval is required on the authorization
- DVRS Purchasing approval is required on the authorization for any state term contract item that cost is  $\geq \$10,000$
- Authorization issued to the state term contract vendor

#### **Cost $\geq \$25,000$ (including shipping, handling and set-up charges)**

- Justification documentation is entered in the client's ECF in BEAM that includes justification statement regarding the client's need and use for the equipment, financial eligibility and comparable benefits applied if applicable in addition to the specialists' assessments and equipment request forms with the equipment specifications
- The state term contract quote is obtained outside of BEAM
- Supervisor and program chief reviews the quote and justification packet
- Supervisor notifies the case manager of approval to proceed outside of BEAM
- The justification packet and quote are submitted to DVRS Purchasing outside BEAM
- DVRS Purchasing reviews and submits the information to DHHS Purchasing & Contracts for review and approval
- If approved, case manager is notified by DVRS Purchasing
- Case manager completes the plan entry, creates the authorization and completes the Request for Quotes (RFQ) form in BEAM
- Case manager, supervisor, program chief and DVRS Purchasing approval is required on authorization
- Case manager issues the authorization to the state term contract vendor

#### **Equipment NOT Available on State Term Contract**

**Durable** medical equipment (DME), as defined in the Social Security Act, is equipment which can withstand repeated use, and is primarily and customarily used to serve a medical purpose, and generally is not useful to a person in the absence of an illness or injury, and is appropriate for use in the home. **A prescription is required to purchase durable medical equipment.** DME that is included in a home modification project such as a tub bench or shower chair does not require a prescription for purchase. The cost of DME needed for a home modification project should not be included in the home modification quote and should be processed separately.

The Division is required to use state term contract vendors for the purchase of durable medical equipment. **If the equipment is not available on state term contract, bids or quotes must be obtained regardless of the cost of the item. Justification to purchase off contract should be submitted with the client purchase request to DVRS Purchasing for approval.**

**Cost < \$500 (including shipping, handling and set-up charges):**

- Verify item is not on state term contract
- No quote is required but price comparison recommended to ensure lowest cost
- Supervisor approval not required on the authorization
- Authorization issued to the selected vendor

**Cost ≥ \$500 but < \$2,500 (including shipping, handling and set-up charges):**

- Verify item is not on state term contract
- Justification documentation is entered in the client's ECF in BEAM that includes justification statement regarding the client's need and use for the equipment, financial eligibility and comparable benefits applied if applicable in addition to the specialists' assessments and equipment request forms with the equipment specifications)
- At least one quote is obtained outside of BEAM (three quotes is preferred).
- Supervisor reviews the quote and justification packet
- Supervisor notifies the case manager of approval
- Plan entry is completed, authorization created and Request for Quote (RFQ) form completed
- Supervisor approval is required on the authorization
- Authorization issued to the selected vendor

**Cost ≥ \$2,500 but <\$10,000 (including shipping, handling and set-up charges):**

- Verify item is not on state term contract
- Justification documentation is entered in the client's ECF in BEAM that includes justification statement regarding the client's need and use for the equipment, financial eligibility and comparable benefits applied if applicable in addition to the specialists' assessments and equipment request forms with the equipment specifications
- Three quotes are obtained outside of BEAM.
- Supervisor reviews the justification packet
- Supervisor notifies the case manager of approval to proceed
- The justification packet is submitted to DVRS Purchasing outside BEAM
- A formal bid process will be completed by DVRS State Purchasing
- When the bids are received, DVRS State Purchasing will notify the case manager of the awarded vendor and the price quote for the item(s).
- Case manager completes the plan entry and obtains all signatures required including the consumer signature
- Case manager notifies DVRS Purchasing after all signatures obtained on the plan
- Case manager, supervisor, program chief and DVRS Purchasing approval is required on authorization
- DVRS Purchasing creates the purchase order outside of BEAM and issues it to the awarded vendor

**Cost ≥ \$10,000 (including shipping, handling and set-up charges)**

- Verify item is not on state term contract
- Justification documentation is entered in the client's ECF in BEAM that includes justification statement regarding the client's need and use for the equipment, financial eligibility and comparable benefits applied if applicable in addition to the specialists' assessments and equipment request forms with the equipment specifications)
- Supervisor and program chief reviews the justification packet
- Supervisor notifies the case manager of approval to proceed outside of BEAM
- The justification packet is submitted to DVRS Purchasing outside BEAM
- DVRS Purchasing will submit the packet to DHHS Purchasing & Contracts
- A formal bid process will be completed by DHHS Purchasing & Contracts
- DHHS Purchasing & Contracts will send the lowest bid to DVRS State Purchasing for review
- When the bid is approved by DVRS Purchasing, DHHS Purchasing and Contracts will certify the bid
- DVRS State Purchasing will notify the case manager of the awarded vendor and the price quote for the item(s).
- Case manager completes the plan entry, obtains all signatures required including the consumer signature and then notifies DVRS Purchasing
- Case manager, supervisor, program chief and DVRS Purchasing approval is required on authorization
- DVRS Purchasing creates the purchase order outside of BEAM and issues it to the awarded vendor