

California AT Act - Device Loan & Reporting Webinar Transcript

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- [Kathrine] My name is Kathrine Crowley. I am CFILC Ability Tools program manager, and I'd like to welcome you to Ability Tools newest installment in a series of webinars, outlining the activities established by the AT Act. Today, we'll be providing an overview of the activity device loan. Last month, we discussed the activity reutilization because it was a natural potential step. When thinking about how consumers become informed of the services available to them and begin to seek out services based on their individual needs, using that trajectory of thought. We're continuing along with the experience of the consumer which could bring them to many possible activities as a next step. One of which could be participating in a device loan activity. Our training objective for today will be to clarify the particulars of the activity device loan as it's defined by the AT Act. This is with the intention of facilitating more frequent and effective execution of device loan activities under the AT act, and also facilitating more comprehensive and accurate reporting of device loan activities under the AT Act. A device loan is defined as state AT programs providing short-term loans of assistive technology devices to individuals, employers, public agencies or other seeking to meet the needs of targeted individuals and entities. You might be asking yourself if this activity is a required activity for you to perform. Well that depends the state of California's department of rehabilitation and CFILC partner to contract out the execution of device loan activities to 12 device lending and demonstrations centers throughout the state. So if you're a staff member of one of these 12 device lending and demonstration centers who receive AT Act funding, then yes, device loan activities are required activities. Device loan activities exist within the state level category and are designed with the intention of facilitating a consumers access to assistive technology it's required by the federal government, that state level activities take up about 60% of the AT Act funding received by the state with the remaining 40% going to state leadership activities. So there is an expectation and built in support for device loan activity implementation Device loan is the activity where you're providing short-term loans of devices to members of the disability community, community members reach out with the device name and you respond to those needs. These needs can manifest in the form of loaning a device to assist in decision-making. A consumer might have determined what type of device could best assist regarding a challenge they're experiencing through a discussion or a device demonstration with you or they could have researched independently or had prior experience, which provides a good idea of what type of device they need but they still require that hands-on experience with specific devices to determine which of those devices will fit their permanent need. In this case, they can borrow a device on a short-term basis and be able to make an informed decision when they move forward to purchase their own device. Many times we may loan a device as a stop gap measure. When a consumer is waiting for a device repair. We may be doing a repair for them or they might have their personal device with a vendor for repairs, but either way, there is an apparent need for the device and they need a loaner while they wait their return of the repaired item. Similarly, there are situations where we may loan a device while the consumer is waiting for device funding. This could result from a new need, new awareness of an AT solution to an established need or a replacement occurring for a broken or outdated device. Either way your consumer could find themselves waiting on approval for funding from their insurance, Medi-Cal, a loan program or even a private loan. The need for the device is still there, however, regardless of the need for these funding sources to cross all T's and dot all I's this is where we can step in with a short-term loan to fill that need until their new devices in hand. A device could also be loaned for the purpose of a short-term accommodation where the consumer is experiencing a need for a limited time perhaps their need of a lift assist chair until we recover from a surgery to provide a magnifier at a conference registration table, or an individual needs to borrow a ramp while their family member stays with them for a few weeks, these are all valid needs that we can support an additional situation which might involve a device loan is loaning a device for training our professional development in these instances staff could borrow a device to better familiarize themselves with the device. A student could reach out to have a hands-on learning experience with the devices being discussed in the class on assistive technology, or a staff member could check out devices to use to educate the public on what types of assistive technology is available to them when they interact with our centers. An activity commonly conflated with device loan is open-ended loans or utilization activity. This conflation is understandably confusing because it has loan right in the name. So you would think it was a loan activity but because open-ended loans are a permanent form of acquisition, rather than an access activity to let the consumer try it out. Open-ended loans fall under reuse. The best way to determine which activity you're performing is to look at the loan links. You're performing a device loan activity. If the device has a definite limited loan end date, this was versus an open-ended loan where consumers are provided a device with unlimited loan length. This is not to say that a device loan becomes an open-ended loan when it surpasses the initially established length of the loan a staff will sometimes extend loans to accommodate the needs of the consumer. But even in these instances, there is an agreed upon return date and the devices expected back at that time. An open-ended loan does not establish such an end date. Also staff who provide devices, device loans they fully expect and depend on a return of their loan device, which is in stark contrast to staff providing open-ended loans who do not typically expect a return of the item. Simply advising the device can come back if the consumer finds, they no longer need the device in order to get that device back out to another consumer on another open-end loan. And finally centers who provide device loans need to keep a tight inventory of their devices in order to record all of the activities associated with them and to help safeguard against loss of devices. This contrast with centers who provide open-ended loans where it's not necessary to inventory devices as you're able to add a device into a revitalization activity at the activity page without needing to pool from an established inventory. DR has determined that the AT Act and AT advocates will be supported under the same roof as ILCs, which is very unique as California as the only state, which does this. California AT advocates and the hub Ability Tools perform state leadership activities and Ability Tools as the hub performs and contracts out the performance of state level activities like device loans out to the California's device lending and demonstration centers. As we continue further into the series we'll discuss more of the state level activities. One of our requirements as the hub is to collect, organize and report all state leadership and level activity to the federal government. In order for us to count all of the hard work that gets done it needs to be individually reported by the centers performing those activities. National Assistive Technology Act Data Systems or NATADS is the web-based aggregate data reporting system used by state AT programs to submit the required data elements of the APR as mandated by the AT Act. NATADS primary purpose is to serve as the official APR data collection mechanism. However NATADS has also has a web-based day-to-day data collection system that can optionally be used by state AT programs for collecting and managing data reporting for all activities included in the state plan for AT and required by the annual progress report. As a result of this day-to-day reporting option being available as a central reporting system, capable of ensuring the validation of all of California's data California's Assistive Technology Advisory Council and the department rehabilitation made the decision that California would utilize NATADS for collecting the data relevant to our state's AT Act activities. Upon your reminder email this morning you should have received two documents titled NATADS activity guide, main inventory entry and NATADS activity guide device loan activity entry. I'm now going to do a live walkthrough of the steps. You'll go through to enter your device loan activities. Now, I could do a walkthrough of maintaining your main inventory but we actually have a recording of that available in our training library, we did an inventory maintenance webinar for entering Chromebooks and Yetis and all of the information that is specific to those items but general in how you enter the actual items into the library into your inventory. So you can go ahead and visit that at any time. If you have any questions about entering and maintaining items into your inventory. For now let's move on to specifically device loan activity. So you're going to begin by entering the NATADS website using your work email and your unique password. You're going to select day-to-day new. And from the NATADS day-to-day application page you're going to scroll down to the state level functions and select the device loan button. From here you can look at device loan activities. You can look at, you can add device loan activities. You can see your request queue to see if there are any requests in from consumers who are using the website to put in requests for items. But if you're really wanting to add an activity it's always best to start with the consumer. That way, if you start adding an activity and the consumer isn't in the system you don't have to redo all of the work that you just started. You'd have to go all the way back create a client profile and then start from scratch. And that's no fun. So let's start from our client. We're going to view clients and under the search parameters you can search from the last name, first name, full name or any other host of information that you might have available for you to be able to add an activity to this person. Let's go ahead and start with the last name and I'm going to use my favorite consumer. Underneath the search button, you're going to see that there is a records table and it will bring up all of the options available based on your search. You can then select the name it's hyperlinked to their client information sheet. You'll be able to scroll down past their primary information, their address and their contact information. And you'll find a series of records tables for all of the activities that you can associate with a consumer. So you'll see device loan, device demonstration, device revitalization, state financing, training, information and assistance and technical assistance along with custom activities. The only activity that you're not going to see there is public awareness. And that's because we don't tease out individual consumers for public awareness events. So for the purposes of today's training you're going to go to the device loans banner and underneath the record's table, you can click on the hyperlink option, add device loan from there you'll have the loan date auto-filled with today's date. And you can see that the end date is going to be set automatically when all items are checked in it automatically populates your name which is why it's very important that you use your own unique login for this for entering any new activities. That way we can verify that it was you that entered it. You're going to select the purpose of the loan. Now what's going to change with the purpose of the loan is if you select assistant decision-making device trial or evaluation the first option you're going to see that the performance measures. If you scroll down to performance measure decision and satisfaction information they're going to read primary area of AT use, AT performance decision and satisfaction. Those are AT access performance measure questions. If you were to choose any of the other options serve as a loaner during device repair or while waiting for funding, providing accommodation on a short-term basis, conduct training self-education or other professional development activity it's going to update your page. And the only thing that's going to change is now the performance measures are going to be measures of acquisition activities. So primary area of AT use, reason for using AT programming and contrast and satisfaction. That's why it's very important that you accurately report what the purpose of the device loan is. The loan duration is going to be auto-filled. The due date will also be auto-filled. The AT recipient category is going to provide a dropdown menu for you to select how that individual identifies as an individual with a disability, family, guardian or authorized rep, reps of education and so on. So I'm gonna go ahead and select individual with a disability for Ahab. And you'll see that since you started with your consumer and you're associating a device loan activity to the consumer, it already populated them into the field for the clients related to device loan. So that's one step you don't have to worry about. If you need to add additional clients, you can go to the add clients button that's located just underneath the banner, and there will be search parameters where you can search by just like last time last name, first name, full name, a whole host of identifying factors, type in your search hit search and the option will pop up and you can select, you can click on their hyperlink name to add them to the activity, hit close and you're ready to go. From here you'll continue to scroll down and you'll see the banner titled inventory devices loaned underneath that banner you'll see a hyperlink that says, add inventory, select the hyperlink and a window's going to pop up over your screen. It's going to say search and add inventory to device loan. And you can again, select your search parameters. So I'd like to search by inventory name. That's easiest for me. If I have a consumer that's coming in, they're not gonna know the inventory number or the manufacturer model. They're gonna be telling me I need to borrow a ramp. So I'm gonna type in, underneath that inventory names as area you can see that there's also another option for you to search by that says view inventory from other regions. If you look for something in your inventory and it doesn't pop up but this is a need that you want to be able to fulfill for your consumer, you can select this box and it will search in other regions for those items. And then you can reach out and coordinate with other centers to see if they might be able to loan the item to the consumer for you. So hit search. And I'm gonna go ahead and go with the portable folding wheelchair ramp because Ahab is a pretty active guy. When you collect it, it's gonna say success. Portable folding wheelchair ramp eight feet has been added. So you can scroll down to the bottom of that window, hit the close button in the bottom left hand corner. And when you scroll down your screen and see the inventory devices loaned, you'll see that the item has been added to your activity, underneath that field, you'll see under the record's table that it'll say check in all items. This is not something you need to worry about now. You're still in the process of checking it out. So go ahead and ignore that for now. There's going to be a banner that says additional, other devices loaned. This field is... It can be confusing for some people because they see that they can add additional items up here. So why does this area exist? The reason that this field exists is because there are times where you have a device that you check out in the inventory devices loan section like a tablet, you're checking out that tablet so the consumer may be because they wanna try out Proloquo two. So here, you're going to add in device category you're going to add in speech and communication in that instance, you're gonna add the number of devices. It's that one program. And under the description you can type in Proloquo two. So this area is for items that are not tangible devices that you're handing out. There are specific devices that are integral to the needs of serving that person with a disability but they aren't a tangible item that you're actually inventorying and handing out to them. It's an app on a computer. And so you can add that to it. And that way you can more fully understand why they're borrowing this item and what their needs are. Under the performance measures. You're not going to be able to save this device loan activity without selecting some options. Sometimes you have the consumer with you while you're processing this device loan. And you can ask them, is it for education, employment or community living? Is the performance decision that the AT will meet the needs, not meet the needs, no decision made, non respondent. Satisfaction and keep please keep in mind satisfaction measures are measuring how satisfied they are with your device loan activity, not the device. If the device didn't meet their needs, but they were happy with the process and that you worked with them to try and find out if it was going to meet their needs then they would select highly satisfied. The measure is of the activity, not the device. So my advice in these situations would be to select non respondent. If you aren't able to get this information from the consumer at the time of checking it out and you're going to update it when you get your survey back with all the performance measures indicated. You can provide an anecdote if you scroll down, there's an anecdote batter with a text box that can accommodate up to 10,000 character count. You can put in information about the activity, their needs. You can put in the individuals that are associated with the activity. The individual with a disability. Anybody who's assisting them, their relation to the activity. If you want to put that you are going to be referring them to a specific vendor for a need. You can put there the person's name and their association. You can put what the person is in there for, what devices they're interested in and just be as descriptive and provide a narrative. I have all the parameters lined out in the guide. So you can take a look at that. Underneath that you're going to see that there is an anecdote image banner and underneath that banner, you can see that you can add an image for the anecdotal story. This is really great. If you had a particularly good interaction with this individual, and you're wanting to put it to send in a success story, you can provide the success story in the anecdote area, and then slowly hit the select button for the anecdote image and apply an image from your computer onto the NATADS site. And you can also provide an alt text to your images. Once you've gotten all of that taken care of you're going to go to the bottom left hand corner and select the save button. And it's been saved. It will then move you to the device loan view page where you can perform a variety of functions you can modify. So this will be useful if you have somebody who checks something out for 30 days and they called and said, I need it for another 20 days would that be all right? If you determined that you can extend their loan you can select modify, extend the loan duration so that it isn't overdue in your loan inventory. You could also select the button check-in loan which we'll be going over in just a moment. You can select the delete button. This is definitely something that you do not wanna do lightly. In fact, this is generally something that's only performed by CFLC Ability Tools Hubstaff. you can print packing slip. You can print the survey. You can go back to the list of device loans or you can go back to the client that's associated with the loan. So what we're going to is go over first is printing out the packing slip and printing the survey. So you've already processed their loan and you're gonna be handing off or mailing the device to the consumer. You're going to always want to print the packing slip and print the survey. Packing slip is important because it include the, in the packing slip it's included the device loan agreement. So when you select print packing slip, a window is going to pop up over your screen. And you'll see that you have all of the information related to the loan, but there's also a whole area underneath with a device loan agreement that has an area where you can sign and date your wish for your consumer to be able to check out the loan. You can either download it onto your computer or you can print out the agreement. And once you've selected how you wanna retain this agreement, you can hit the X. And move back to, I'm sorry it's giving me trouble and move back to your screen, your device loan view screen. Once you've done that, you can go to the print survey button and it'll have the similar options where you can download the survey. You can print out the survey or you can exit the window. And that's in the upper left hand corner of the window that popped up over your screen has all of the same information related to the device. And it has the access performance measure questions and the satisfaction ratings. This is how you're going to gather your performance measure information. If you weren't able to obtain it when you were first opening up the loan for your consumer they can send this back to you and you can gather it that way. Select the X button to leave that window and that is enough to get you through the process of sending out the device loan. Now, the other end of it is it's been a month. The item comes back to you now how do you go to check in the loan? I'm gonna go ahead and start from here but what you would typically do is, sign in, go ahead here. We're gonna go ahead and start from the beginning. Sign in, go to your day to day. And then I would do a search by client personally because rather than having to type in a code for your specific item, you have this item that came back from a consumer that you know, you know their name. So you're going to go to view clients, search for them by name, select the consumer. And then you can scroll down and you'll see that the device loan is still active inside the records table, under device loan activities. So from here, you can select the device loan and it takes you to that device loan view page where you were able to print your packing slip, print your survey, modify the loan or check in the loan. And so we're going to go ahead and select the check-in loan button. That's located just underneath the device loan view banner. It's going to allow you to enter the check-in date. It auto-fills the name of the person who's checking it in, the purpose of the loan is static. You can't change that. And the AT recipient category can't be changed. You're going to select what's being checked in either by selecting the checkbox next to the item or if there were multiple items and everything's being checked in, you can select all items. Or if they're only returning one of two perhaps you can select that and check that item in and still keep this loan activity open for the other item. So we're going to go ahead and say that he is checking in his ramp. Let's say that this is gonna get turned in tomorrow because he really needed it on a very short-term basis. And the underneath the performance measure and decision satisfaction information, you can see that new are still able to modify the performance measures. So let's say you got the item back and they kept the survey, filled it out, sent it back with the item. The only thing you can't change is the primary area of AT use. And that's because you're assisting this person and figuring out what device they need to borrow. So you're going to know what they're using it for. And so you don't really need a survey to figure that part out. You're going to have already established that upon the device loan process. So you can look at your survey and see that they decided, yep, this ramp is going to meet my needs and I'm highly satisfied. And so it's already built in that when you check in the loan that you have right in front of you the performance measures to be able to be updated and accurately reported. You can add any story that you didn't put in before. If they when they returned the item they sent you a letter or they called you and let you know what was going on you can add to that story to full, more fully flesh out the device loan activity. And from there, you can select the check-in button on the bottom left hand corner. And your loan has been completed. This is a full overview of the activity device loan. Again, we could go over the main inventory entry but we do already have something on record for that because you're going to obviously need an inventory to pull your device out of if there's a need, if the fact that it was very specific to how you enter a Chromebook or how you enter a Yeti, if that is a problem for people then I would be happy to further on after we get done with all of these AT Act activity webinars put together a webinar specifically for entering items into the device inventory. So let's go ahead and open it up to Q&A and discussion. Does anyone have any questions, clarification's concerns? Anyone would you like to share how you perform device loan activities any techniques for attaining these performance measures or ensuring the return of the devices?

- [Megan] And this is Megan, feel free to either raise your hand or send us questions in the Q&A and we do have a question that says, "If a consumer borrows two items at once is that one loan or is that two loans?"

- [Kathrine] And so that actually comes up quite a bit in the instance of a consumer borrowing, let's say they have not decided if this a rollator or a walker is what they want. So they borrow both of them to be able to try them out and compare them for their need to be able to have better access to mobility. That's going to count as one device loan because the it's like, I always say you need to look at the goal of the activity to be able to determine how to accurately report it. So they are trying to solve one challenge that they're facing, and you're going to be recording the performance measure for that challenge. And so those two devices being checked out they are trying to meet just one need. So the loan activity only counts for one.

- [Megan] Great thank you. So we have a question here that says, "Should we be using the forms provided on NATADS for device loan agreements?"

- [Kathrine] If I can get some clarification, it would be helpful. The loans that are provided on NATADS specifically are the ones that are included in the packing slip and in the survey. Yes, those are the ones that you should be using. If you are obtaining documents, I know that some people have been using documents that are from the AT exchange, and sometimes that can get conflated. That's not a good idea. I would definitely use just, it's very simple just go ahead and select the packing slip print that out and print out the survey and those are the forms that you need.

- [Megan] This is Megan. If that did not answer your question, please let us know. Oh, perfect. It answered your question. That's awesome. We have a followup here that says, "What if the consumer requests the two items that serve different functions like a tablet and a reacher, would that be two loans?"

- [Kathrine] Yeah, definitely. Again, it has to do with whether or not these items are serving the same purpose. So if you had like we were talking about earlier someone deciding between a rollator and a walker for that one specific need, that's gonna be one loan. But in the example you gave with a tablet and what was the other item or reacher. Those are two very different purposes. Those are two very different needs. And so you would record them separately. I would go ahead and do two separate loans and you would record those performance measures separately also. So yes, two items serving two different needs would count as two loans.

- [Megan] Perfect. I hope that clarification helps for folks. So we have a question here from Sergio at Cal life that says, "What happens if a consumer does not return the device?"

- [Kathrine] And see that has a lot to do with the protocols for each individual center, you a good way to approach it is if they haven't returned the device you need to make sure to try and make as much contact as possible to reach out to this consumer. See if there they need an extension on the loan. If there are any other extenuating circumstances going on. You should have because nobody can create a NATADS account without entering a phone number and address and an email. So you should have a couple of points of communication, if you are successful in reaching out to the consumer that way, then again that's gonna be up to your center. If it's something like a reacher that maybe isn't it's terribly expensive and the center is okay with just kind of letting that go, then it would be up to the center, whether they would just close that out as you know, we're not getting that back. We're just gonna accept that loss. If it's something more expensive that is a less acceptable loss something like that hand controls for a vehicle those are really expensive. Then you would probably want to file a police report. You have all of the information on hand and you can use the resources from the police to try and get the item back. I know that for a lot of centers that can be a difficult thing. Some centers are like we have something between five to six, depending on where you put the boundaries centers that are located in the state of California in the Los Angeles region versus a center like Fresno who is one center and they're covering large physical space. And so actually physically getting items back and involving police is a bit more complicated. So again, it's really up to the center. One really good method for ensuring the return of devices. If you're talking about a tablet or a computer is to get a mobile device management system an MDM, these systems are things that you install on all of your devices and they work to provide a GPS location you have at your central hub you can see where all of the items are located in real time. Kind of like if anybody has used the life 360 app where you can track and see where members of your group are located based on the location of their phone also it's pretty great because it makes so that you can remotely lock down the device. So if you have someone who is keeping the device and it's for more nefarious reasons, less forgetful, less of an issue of people, just not being able to get in touch with you, you can lock down the the device and essentially make it useless to the person. And they'll be more likely to get it back to you. Or at least it's not still just out there and being taken advantage of. You can use that device location to be able to provide that information to the police and they can go and retrieve it for you more accurately, more appropriately, and in less of a sort of doom and gloom element of it. They're really great for having it so that if you get a new app, let's say there's a new version a new app that comes out that you want to try out of AC equipment that you don't wanna have to have every single person that has a tablet out currently come in so that you can put that app on that device. You can use a push notification to push the app out onto the device, and you can alert the person that they now have a new device available a new app available on their device that's at their disposal. So you don't have to have that back and forth going on which is particularly useful during COVID where you wanna bring down those points of contacts as much as possible.

- [Megan] Thank you, Kathrine and kind of piggybacking off that question. If a device ends up not being recoverable in the center does not get it back from the consumer. How do they remove that device from NATADS, what's the proper process?

- [Kathrine] Well, again, it's gonna depend on your status as a center. So if you are using the, if you're using the NATAD system to track your device loans but you're not a device lending and demonstration center then that is going to be up to you. How you manage your inventory. It's gonna be up to your director. If you are a device lending a demonstration center we have protocols in place for that program. If you have a device go out, you can't get it back. You've tried, it's just gone. You're going to fill out an item add an item removal transfer form. I'm actually in the middle of updating all of the device lending in demonstration center forms. I'm gonna put them all in one workbook so that you have basically kind of like a virtual packet of all of the documents that you'll ever need along with an updated policies and procedures manual that I'm currently in the throws of. That's a long manual guys. And so you'll have that form where you can go in you can put in the NATADS inventory ID, you put in what the device is, you select what happened to it whether it was lost, stolen, broken, and you're going to put in any other necessary information, like a serial number. And you're gonna send that on to me at kathrine@cflc.org. That's K-A-T-H-R-I-N-E-C-F-I-L-C.org. And I will go ahead and look over the device and we'll validate it and everything and I will be the person to take it off of NATADS for you.

- [Megan] Great, thanks, Kathrine. And I know most folks on this call are connected to us already, but I wanna head in through Katherine's email in the chat as well. If anyone has questions, please feel free to either raise your hand on here on zoom and we can allow you to talk or to send them to us in the Q&A.

- [Kathrine] And I would love to be able to hear if anybody has any advice, anything that they do to be able to more readily obtain performance measures to ensure the return of your devices to have a open discussion about the challenges COVID has brought about and the adaptations that we've utilized. And I would also advise that we continue the discussion on our list serves. They're a really great resource to just go ahead and throw a question out to your community of coworkers and really be able to get a good discussion going and learn from each other. All right. Well, Megan, if you see any other questions pop up then I'd be happy to go ahead and address them. If not, we can probably finish up for the day.