

# Key Components of an ASSISTIVE TECHNOLOGY ASSESSMENT

Assistive Technology (AT) assessments may be obtained from rehabilitation providers who are employed in settings such as medical facilities, universities, schools, non-profit agencies or in a private practice. While certification is not required, it can be beneficial. The most common certification is the Assistive Technology Professional (ATP) ([www.resna.org](http://www.resna.org)). Assessments provided by medical equipment dealers, manufacturer representatives, and private sales agents should adhere to the *Vendors of Assistive Technology Expectations for Best Practices*.

*Providers of assistive technology assessments are expected to meet the criteria outlined in this document.*

An assessment is generally requested by a consumer and/or the payer of the service (e.g. DVR, school district, long term care organization, etc.) to provide comprehensive information about the assistive technology options available to the consumer.

There are many reasons to make a referral for an assistive technology assessment. These reasons might include:

- Determining appropriate workplace or school accommodations
- Determining appropriate assistive technology to facilitate independent living

## Before the Assessment is Requested – Payor’s Responsibilities

The referral source should supply the following information to the assessment provider:

- What are the consumer’s goals?
- Why are you referring this person?
- What is the functional outcome desired?
- What is the consumer’s disability or disabilities?
- What is the impact of the disability or disabilities on functional skills?
- What are the relevant environmental concerns?
- Have appropriate releases of information been signed and has any relevant documentation been included with the referral?



Revised 8/8/2014

*This document serves as a guide for service providers to evaluate the content and quality of an assistive technology assessment.*

## **Evaluating the AT Assessment – Components of a Comprehensive Assessment**

An assistive technology assessment should inform the payor about how the consumer can benefit from assistive technology, including:

- A description of the consumer's disability as it relates to the assessment and relevant background information.
- The specific type(s) of assistive technology solutions that were assessed and the pros/cons of each.
- Identification of any variables that should be considered if the assessment did not occur in the setting where the technology will be used.
- The specific type(s) of assistive technology being recommended.
- How and why the equipment will specifically meet the consumer's needs.
- How the decision was reached (e.g. physical assessment with a variety of options, funding options available, etc.).
- Where or from which vendor the appropriate equipment can be purchased.
- Potential funding alternatives for the equipment.
- The availability of a maintenance agreement, warranty or other safeguard, and whether this is included in the purchase price or available at an additional cost.
- The anticipated cost of the equipment, training and maintenance.
- Description of the repair procedures (e.g. shipped, in-home, remote service, etc.).
- The availability of loaner equipment prior to purchase or during repair services.
- Identification of training needs for the recommended device(s), who is able to provide that training (i.e. the vendor, manufacturer, or an outside provider), and training related expenses.

---

*This document was created using source material from the Iowa Assistive Technology Program.*

*Agencies throughout the State of Wisconsin collaborated in this effort, including:*

Center for Deaf-Blind Persons

DWD-Division of Vocational Rehabilitation

IndependenceFirst

DHS-Office for the Blind and Visually Impaired

DHS-Office of Resource Center Development

UW Stout – SVRI

Center for Communication, Hearing & Deafness

Goodwill Industries of Southeastern Wisconsin, Inc.

Milwaukee County Department on Aging

DHS-Office for the Deaf and Hard of Hearing

UW Milwaukee-College of Health Sciences

WisTech

**Full permission is granted to photocopy this document.**

**To download an electronic version, visit:**

[www.wistechwisconsin](http://www.wistechwisconsin)



# VENDORS OF ASSISTIVE TECHNOLOGY

## Expectations for Best Practices

Assistive technology devices may be obtained or purchased from medical equipment dealers, manufacturer representatives, private sales agents or non-profit agencies. Assistive technology devices:

- May have been recommended through a professional assessment
- May be consumer selected as a result of an equipment demonstration/loan
- May have been selected from product literature or a website

*Providers of assistive technology products and services are expected to meet the criteria outlined in this document.*

### Qualifications of Vendors

Vendors must have sound knowledge of anatomy, physiology, disabling conditions and disease processes relevant to the technical aspects of the equipment they provide. In order to gain and maintain this knowledge, vendors will regularly engage in self-guided study and/or attend courses, seminars, trade shows, and other continuing education activities.

*Sound knowledge* can be defined as having the educational background, professional or personal experience or a combination thereof to provide comprehensive information and services to the consumer. This may be in the form of formal education, professional certification or in-depth training by a product manufacturer.

### General Responsibilities of Assistive Technology Vendors

- Gather comprehensive background information about the individual's disability, functional limits and needs, as well as the individual's goals related to assistive technology.
- Explain the **range of options** that could meet the **needs of the consumer**, including free technology, no-tech to high tech options, commercially available technology or custom-fabricated technology.
- Be transparent: scope of products, services and manufacturer relationships.
- Remain objective when providing comparisons of the technology options.
- Use appropriate tools and measurements to assure proper fit and function of the equipment.
- Provide delivery, fitting and adjustment of equipment.
- Provide complete instruction of proper use.
- Provide maintenance and repair information, including who can provide these services and who pays for these services.
- Provide information about when the consumer may be eligible for an equipment update from a funding source, where applicable.



Revised 8/8/2014

***Vendors Will Base their Recommendations Solely on Meeting  
the Customer's Needs in the most cost effective manner***

**Vendor Responsibilities - Financing Process**

- Inform the consumer or payor of services about what the exact costs will be related to the recommended technology. In addition, a vendor shall provide clear information about any co-payments, etc., when applicable.
- Provide clear information about funding options available for the equipment.
- Provide information about reimbursement requirements through insurance or third-party payers.
- Obtain prior authorizations or other required approvals for purchase when needed before ordering equipment.

**Vendor Responsibilities - Purchasing Decisions**

- Provide the equipment being recommended (or similar equipment) for demonstration or trial use whenever possible.
- Provide referrals to other users of that piece of equipment to obtain peer feedback, if available.

**Vendor Responsibilities - Ongoing Support and Service**

- Provide clear information about their ability to provide long-term service and support for equipment, whether at the vendor or manufacturer level.
- Maintain knowledgeable and qualified staff to provide training.
- Maintain an adequate inventory of replacement parts in order to provide timely service or repair, if applicable.
- Provide a loaner device, if available, or assist with location of a loaner device if repairs are needed.
- Provide a written estimate of cost and time required for repair work, if applicable.
- Provide clear information about the equipment warranties and response times for services.
- Maintain adequate levels of professional liability insurance and/or product liability insurance, if appropriate.

---

***This document was created using source material from the Iowa Assistive Technology Program.  
Agencies throughout the State of Wisconsin collaborated in this effort, including:***

Center for Deaf-Blind Persons  
DWD-Division of Vocational Rehabilitation  
IndependenceFirst  
DHS-Office for the Blind and Visually Impaired  
DHS-Office of Resource Center Development  
UW Stout – SVRI

Center for Communication, Hearing & Deafness  
Goodwill Industries of Southeastern Wisconsin, Inc.  
Milwaukee County Department on Aging  
DHS-Office for the Deaf and Hard of Hearing  
UW Milwaukee-College of Health Sciences  
WisTech

**Full permission is granted to photocopy this document.**

**To download an electronic version, visit:**

[www.wisconsinwistech.com](http://www.wisconsinwistech.com)

