

Administration for Community Living

State Grants for Assistive Technology Program Annual Progress Report (AT APR) Data Collection Instrument

OMB # 0985-0042

Expiration Date:

Paperwork Reduction Act Public Burden Statement:

According to the Paperwork Reduction Act of 1995 5 CFR § 1320.8(b)(3), no persons are required to respond to a collection of information unless such collection displays a valid OMB control number (OMB 0985-0042). Public reporting burden for this collection of information is estimated to average 404 hours per response, including time for gathering, maintaining the data needed, completing, and reviewing the collection of information. The obligation to respond to this collection is required to maintain or retain benefits under the 21st Century Assistive Technology Act (AT Act of 1998, as Amended), applicable to Section 4 formula funded grantees for the State Grant for Assistive Technology Program. This Information Collection (IC) contains data needed for completion of the State Grants for AT Program Annual Progress Report (AT APR). The AT APR IC is designed to provide the Administration for Community Living (ACL) with information necessary for program planning and reporting data on required state-level and state leadership activities to Congress, the Secretary of Health and Human Services and additional entities. The AT APR is organized by the state-level and state leadership activities outlined in the 21st Century Assistive Technology Act (AT Act of 1998, as Amended). State Lead agencies or Implementing Entities will report on these state-level and state leadership activities and will provide data required by Section 4(f) of the Act and other necessary information. Annual data and information from individual states will be available to the public once the information is complete, formally submitted, reviewed, and published. Data will be kept private to the extent allowed by law, there are no assurances of confidentiality. The states will not report information that identifies individual consumers. States will provide anecdotes about the effect of their programs on individual consumers, but states are instructed to write anecdotes in a manner that ensures their anonymity. All other data provided is reported in the aggregate. The web-based system used for this instrument will not allow public access to the reporting instrument for data entry, and states will have access to their data only. They will not be able to see or manipulate data of other states. Individual state reports will be kept confidential until they have been finalized by the state and accepted by ACL. Once a report has been finalized by the state and accepted by ACL, access to the aggregated state-specific and national data will be available to the public via the Internet. However, while the public will be able to view the data, they will not be able to alter the data. States will be advised that their data will be available to the public in this manner. Send comments regarding the burden estimate or any other aspect of this collection of information, including suggestions for reducing this burden to Robert Groenendaal, Administration for Community Living, 330 C Street, SW, Washington, DC 20201 or via E-Mail Robert.Groenendaal@acl.hhs.gov.

Table of Contents

General Information.....	3
State Financing.....	4
Reuse.....	15
Device Loans	19
Device Demonstrations.....	24
National Outcome Measures.....	28
Educational/Training Activities	30
Technical Assistance.....	34
Public Awareness and Information and Assistance	37
Coordination/Collaboration and State Improvement Outcomes.....	40
Additional and Leveraged Funds.....	42
Data Collection Instrument Access Performance Measure	44
Data Collection Instrument Acquisition Performance Measure	45
Data Collection Instrument ICT Accessibility Performance Measure	47
Survey Instrument Customer Satisfaction	48

*Additional instructions for completion of this form and relevant definitions are contained in a separate document, "**Instruction Manual and Definitions for the Annual Progress Report (APR) for State Grants for Assistive Technology.**"*

General Information

Statewide AT Program (Information to be listed in national State AT Program Directory)	
1. State Program Title	
2. State AT Program URL (home page for State AT Program)	
3. Mailing address	5. State
4. City	6. Zip code
7. Main email address (for general public to use to contact State AT Program)	
8. Main phone number (for general public to use to contact State AT Program)	
9. Separate TTY number (for general public to use to contact State AT Program if applicable)	
Lead Agency	
10. Agency name	
11. Mailing address	13. State
12. City	14. Zip code
15. Lead Agency URL	
Implementing Entity	
16. Does your Lead Agency contract with an Implementing Entity to carry out the Statewide AT Program on its behalf? Yes <input type="checkbox"/> No <input type="checkbox"/> <i>If yes, complete Items 17–22.</i>	
17. Name of implementing entity	
18. Mailing address	20. State
19. City	21. Zip code
22. Implementing Entity URL	
Program director and other contacts	
23. Program Director for State AT Program (last, first)	
24. Title	
25. Phone	
26. E-mail	
27. Primary Contact at the Lead Agency (last, first)	
28. Title	
29. Phone	
30. E-mail	
31. Primary Contact at Implementing Entity (last, first) – If applicable	
32. Title	
33. Phone	
34. E-mail	
Person Responsible for completing this form if other than State AT Program Director	
34. Name (last, first)	
35. Title	
36. Phone	
37. E-mail	
Certifying Representative	
38. Name (last, first)	
39. Title	
40. Phone	
41. E-mail	

State Financing

Outline

Overview of Activities Performed

- A. Financial loan programs
 - 1. Loan applications
 - 2. Income of applicants to whom loans were made
 - 3. Loan type
 - 4. Interest rates
 - 5. Types and dollar amounts of AT financed
 - 6. Defaults
 - 7. Additional Data for Title III Funded AFP
- B. State financing activities that provide consumers with resources and services that result in the acquisition of AT devices and services
 - 1. Overview of Activities Performed
 - 2. Geographic Distribution, Number of Individuals Who Acquired AT Devices and Services and Number for whom Performance Measure Data are Collected
 - 3. Types and dollar amounts of AT funded
- C. State financing activities that allow consumers to obtain AT for a reduced cost
 - 1. Overview of Activities Performed
 - 2. Geographic Distribution and Number of Individuals Served
 - 3. Savings to consumers, by type of AT device/service
- D. Anecdote
- E. Performance measures
- F. Customer Satisfaction
- G. Notes

Section 4f requirements: (1) the type of State financing activities...used by the State; (2) the amount and type of assistance, including the number of applications for assistance received, the number of applications approved and rejected, the default rate for the financing activities, range and average interest rate for the financing activities, range and average income of approved applicants for the financing activities, and the types and dollar amounts of AT financed; (3) consumers of the State financing activities, who shall be classified by type of AT device or service and geographical distribution

A state financing activity is an activity approved as part of your State Plan for AT that provides for the purchase, lease, or other acquisition of, or payment for AT including State-financed or privately financed alternative financing systems of subsidies. Examples of state financing activities include, but are not limited to administering financial loan programs, administering “last resort” activities funded with non-AT Act dollars, administering cooperative buying programs, administering telecommunications distribution programs, and other activities that result in the acquisition of AT devices and services. Programs that directly provide AT may be programs operated with funds that are earmarked for particular types of consumers (such as children), particular types of AT (such as home modification), or for individuals who meet certain income limitations. States may not use AT Act dollars to provide funds or devices directly to individuals. AT Act dollars may be used to administer a last resort fund comprised of non-AT Act dollars.

Overview of Activities Performed

Did your approved State Plan for this reporting period include conducting any State Financing activities? Check yes or leave unchecked. If yes, complete one or more of sections A, B, or C.

A. Financial Loan Programs

Did your approved State Plan include conducting a financial loan program? Check yes or leave unchecked.

1. Loan Applications

In this section, report on both revolving loans and partnership loans. Revolving loans are made directly by the financial loan program with funds from the loan fund account that are repaid directly back into that account. The entire loan is serviced by the financial loan program. Partnership loans use dollars from another source, usually a financial institution, in which the financial loan program has an investment through loan guarantee, agreement with the partner institution based on an investment deposit, interest or principal buy-down, or other financial or administrative role.

In the table below, report information on loan applications made by Rural Urban Continuum Code (RUCC) of the applicant’s county of residence and the decisions made about those applications. Include all applications that were processed to one of the three decisions shown in the table below (i.e., approved—loan not made, approved—loan made, or rejected) during this reporting period, even if the application was received prior to the start of the reporting period. Do not include applications not reviewed because they were not complete, were withdrawn before a final decision was made, or were still pending at the end of the reporting period. For guidance on how to classify the applicant’s area of residence as metro or non-metro, please see the Instruction Manual.

Number of Applications	Area of Residence		Total
	Metro RUCC 1-3	Non-Metro RUCC 4-9	
A. Approved—loan made			<i>System-generated</i>
B. Approved—loan not made (i.e., the application was withdrawn after the loan was approved, or the loan was approved but not accepted by the consumer)			<i>System-generated</i>
C. Rejected			<i>System-generated</i>
D. Total	<i>System-generated</i>	<i>System-generated</i>	<i>System-generated</i>

2. Income of Applicants to Whom Loans Were Made

This section collects data about the income of applicants to whom loans were made (i.e., those who were counted in row A of the table above). For purposes of this section, the income of these applicants is the gross annual income that the applicants reported on the loan applications (i.e., the amount upon which the decision about the loan was based.) This may be the income of the individual, the family, and/or one or more co-borrowers.

- a. Enter the lowest and highest income reported among all applicants to whom loans were made during the reporting period:

Lowest: \$ _____
 Highest: \$ _____

- b. Use the table below to calculate the average gross annual income of applicants to whom loans were made. In Column A, enter the sum of the incomes reported by all applicants to whom loans were made. The system will divide that amount by the number of applicants to whom loans were made (as reported in row A of the table above to calculate the average income.

A	B	C
Sum of Incomes	Number of Applicants to Whom Loans Were Made	Average Gross Annual Income
\$	System-generated	System-generated

- c. In the table below, enter the number of loans made to applicants who reported incomes in each of the specified ranges. The total number of loans should match the number you reported in row A of the first table. The system will calculate the percentage of loans made to individuals in each income category.

	Number and Percentage of Loans Made to Applicants with Incomes of						Total
	\$15,000 or Less	\$15,001 to \$30,000	\$30,001 to \$45,000	\$45,001 to \$60,000	\$60,001 to \$75,000	\$75,001 or More	
Number of loans							System-generated
Percentage of loans	System-generated	System-generated	System-generated	System-generated	System-generated	System-generated	System-generated

(System will generate an error message if total number of loans does not match number reported in row A of the table in Section A.1.)

3. Loan Type

- a) Enter the number of loans by loan type as defined below. The system will calculate the percentage of loans that fall into each category. Report each loan in only one category.

Revolving loan fund (or revolving loan): A loan fund that uses Statewide AT Program funds for loans. The AT program directly provides the funds that are to be loaned out and retains full control over to whom and at what terms the funds are loaned. As loans are repaid, the money is lent out again to other AT consumers — that is, the same money “revolves” out to other borrowers as earlier borrowers return it to the program.

Partnership loan: A loan administered by and using dollars from a source other than the Statewide AT Program, usually a financial entity, for which the Statewide AT Program has a direct financial investment through interest or principal buy-down, loan guarantee, or agreement with a financial institution based on an investment deposit or other written agreement with documentation of the subsidy provided for loans made (e.g. the financial institution provides a prime or less interest rate without buy-down payment.)

Interest buy-down loan: A partnership loan in which AT program funds are used to buy down the interest rate of a loan. The AT program uses funds to reduce the interest rate that lending institutions offer to consumers for loans to purchase AT. The AT program pays the lending institution for a portion of the interest on the loan, resulting in lower interest payments for the consumer over the long term.

Loan guarantee: A partnership loan in which the Statewide AT Program guarantees that the loan to a consumer is secure and will be repaid, thus increasing the lender’s willingness to loan funds.

Type of Loan	Number of Loans	Percentage of Loans
Revolving Loans		<i>System-generated</i>
Partnership Loans		
Without interest buy-down or loan guarantee	<i>Mandatory Explanation</i>	<i>System-generated</i>
With interest buy-down only		<i>System-generated</i>
With loan guarantee only		<i>System-generated</i>
With both interest buy-down and loan guarantee		<i>System-generated</i>
Total	<i>System-generated</i>	<i>System-generated</i>

(System will generate an error message if total number of loans does not match number reported in row A of the table in Section A.1.)

If a number is reported under Partnership Loans without interest buy-down or loan guarantee you must have a written agreement with the partner organization and must describe the subsidy provided by these loans or other investment of the financial loan program in these loans. Verification that these loans are all low interest (prime or less) will provide the required subsidy documentation. If these loans are not low interest, other verification of the clear subsidy and investment of the financial loan program in these specific loans must be described.

b) Enter the dollar value of partnership loans and revolving loans. The number of loans in each category will automatically populate based on the table in 3(a). Report each loan only once.

Type of Loan	Number of Loans	Dollar Value of Loans
Revolving loans	<i>System-generated</i>	\$
Partnership loans	<i>System-generated</i>	\$
Total	<i>System-generated</i>	<i>System-generated</i>

4. Interest Rates

a) Enter the lowest and highest interest rates among all loans made, including both revolving and partnership loans. For interest buy-downs, report the interest rate to which you bought the loan down:

Lowest: _____ %
 Highest: _____ %

b) Use the table below to calculate the average interest rate for all loans, including both revolving and partnership loans. Enter the sum of interest rates for all loans in Column A. The system will divide that amount by the number of loans made as previously reported and automatically populated in row A to calculate the average interest rate.

A	B	C
Sum of Interest Rates	Number of Loans Made	Average Interest Rate
	<i>System-generated</i>	<i>System-generated</i>

c) In the table below, enter the number of loans made at interest rates in each of the specified ranges. The total number of loans should match the number you reported in row A of the table in Section A.1. above.

Number of Loans Made at Interest Rates of --								Total Number of Loans
0-2.0%	2.1-4.0%	4.1-6.0%	6.1-8.0%	8.1-10%	10.1-12%	12.1-14%	14+%	
								System-generated

(System will generate an error message if total number of loans does not match number automatically populated as the total based on previous reported data.)

5. Types and Dollar Amounts of AT Financed

Use the table below to provide information on the types of devices or services financed and the dollar value of loans made for each type of device or service. Report each device/service in only one category. For guidance on how to classify devices and services, and decision rules for devices and services, refer to the Instruction Manual. Because a single loan may pay for more than one device or service, the number of devices and services reported in this table may exceed the number of loans. However, the total dollar value of loans should be the same as reported previously in 3.b.

For large building access projects or similar activities with multiple devices in one AT category, the numbers reported should reflect a logical access grouping (e.g., a bathroom modification or exterior ramping of a house would be a home modification). Where an AT service (such as an evaluation) was part of a financial loan, include that dollar amount in the appropriate AT category associated with the service (e.g., an audiological evaluation would go in the "hearing" category).

If the loan is a refinance, and the AT purchased with previous loan has never been reported, you should report the AT devices/services purchased with the previous loan as the AT associated with the refinance. (NOTE: If the refinance is of a previous loan and the AT purchased with the previous loan has been reported, the refinance should not be reported at all.)

Type of AT Device/Service	Number of Devices Financed	Dollar Value of Loans
Vision		
Hearing		
Speech communication		
Learning, cognition, and developmental		
Mobility, seating and positioning		
Daily living		
Environmental adaptations		
Vehicle modification and transportation		
Computers and related		
Recreation, sports, and leisure		
Total	<i>System-generated</i>	<i>\$ System-generated</i>

(System will generate an error message if total dollar value of loans does not match amount reported in the Total Dollar Value of Revolving Loans and Partnership Loans calculated in Item 3(b) above.)

6. Defaults

In the first cell below, enter the number of loans that were in default during this reporting period. A loan is in default after 120 days in which the borrower has not made the scheduled payment for the balance still owed; or at which time the organization administering the loan paid the lending institution the remaining agreed upon balance of loan. Do not count any payments that may have been made by the loan administering organization on behalf of the borrower

during that 120-day period as payments made by the borrower. (Rescue payments do not count as borrower payments and the 120-day clock continues.)

In the second cell below, enter the net dollar loss on defaulted loans. Net dollar loss on loans means the amount lost as a result of default during this reporting period after subtracting any funds that were recovered. It includes the amount that is unpaid on any loans in default and any loan guarantee payout amounts minus the amount of collateral recovered.

Number of Loans in Default	Net Dollar Loss on Loans

Note: If you have a loan in default for this reporting period and you reasonably believe you will be able to recoup some of the net dollar loss associated with this default during the next reporting period you can choose to defer reporting the default and the net dollar loss until the next reporting period. This should only occur when loans went into default later in the current reporting period and you have not had sufficient time to sell or otherwise recoup some of the value of the collateral.

B. State Financing Activities that Provide Consumers with resources and services that result in the acquisition of AT devices and services

1. Overview of Activities Performed

How many other state financing activities that provide consumers with access to funds for the purchase of AT devices and services were included in your approved State Plan? – *enter number*. Which of the following best describes this state financing activity? Drop-down box: (1) last resort activity; (2) telecommunications equipment distribution program (including deaf/blind EDP); (3) lease-to-own program, (4) other (specify)

2. Geographic Distribution, Number of Individuals Who Acquired AT Devices and Services and Number for whom Performance Measure Data are Collected

In this table, report the number of individuals who acquired AT devices and services through this activity, by the Rural Urban Continuum Code (RUCC) for the county in which they reside. For guidance on how to find a county’s RUCC, please see the Instruction Manual.

Of the recipients of AT devices and service, identify the number for whom performance measure data can be reported. This may be all of the recipients or may be fewer if the Statewide AT Program is administering a program (using external funding to purchase/provide the AT) on behalf of an entity that has responsibility for providing AT devices and services. The performance measure data questions are not answerable by such entities. While the number of individuals served by such programs should be reported here and in #3 below, performance measure data should not be collected for those individuals.

County of Residence	Individuals Served
A.Metro (RUCC 1-3)	
B.Non-Metro (RUCC 4-9)	
C. Total Served	<i>i System-generated</i>

D. Excluded from Performance Measure (Number of individuals excluded from performance measure data collection because AT is provided to or on behalf of an entity that has an obligation to provide the AT such as schools under IDEA or VR agencies/clients)	<i>Mandatory explanation</i>
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E. Number of Individuals Included in Performance Measures	<i>ii System-generated</i>
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(ii = i minus excluded number D)

If a number is reported in D you must provide a description of the reason the individuals are excluded from the performance measure: _____

3. Types and Dollar Amounts of AT Funded

Use the table below to provide information on the number of devices or services funded and the amount of funding provided, by type of AT device/service. Report each device or service in only one category. Because a single recipient may acquire more than one device or service, the number of devices and services reported in this table may exceed the number of recipients. Refer to the Instruction Manual for decision rules on how to classify devices and services.

For large building access projects, the numbers reported should reflect a logical access grouping (e.g., a bathroom modification or exterior ramping of a house would each be one home modification). Where funding was provided for an AT service (such as an evaluation), include that dollar amount in the appropriate AT category associated with the service (e.g., an audiological evaluation would go in the “hearing” category).

Type of AT Device/Service	Number of Devices Funded	Value of AT Provided
Vision		\$
Hearing		\$
Speech communication		\$
Learning, cognition, and developmental		\$
Mobility, seating and positioning equipment		\$
Daily living		\$
Environmental adaptations		\$
Vehicle modification and transportation		\$
Computers and related		\$
Recreation, sports, and leisure		\$
Total	<i>System-generated</i>	<i>\$ System-generated</i>

C. State Financing Activities that Allow Consumers to Obtain AT for a Reduced Cost

1. Overview of Activities Performed

How many activities that allow consumers to obtain AT for a reduced cost were included in your approved State Plan? – *enter number*. Which of the following best describes this state financing activity? Drop-down box: (1) cooperative buying program; (2) AT leasing for savings program; (3) AT fabrication or AT maker program; (4) other (specify)

2. Geographic Distribution and Number of Individuals Served

In this table, report the number of individuals who acquired AT devices and services through this activity, by the Rural Urban Continuum Code (RUCC) for the county in which they reside. For guidance on how to find a county’s RUCC, please see the Instruction Manual.

Of the recipients of AT devices and service, identify the number for whom performance measure data can be reported. This may be all of the recipients or may be fewer if the recipients

of the cost savings are entities that have responsibility for providing AT devices and services regardless of cost. The performance measure data questions are not answerable by such entities. While the number of individuals served by such programs should be reported here and in #3 below, performance measure data should not be collected for those individuals. See the instructions “Who Must Provide Performance Measure Data” for more information.

County of Residence	Number of Individuals Served
A.Metro (RUCC 1-3)	
B.Non-Metro (RUCC 4-9)	
C. Total Served	<i>i System-generated</i>
D. Excluded from Performance Measure (Number of individuals excluded from performance measure data collection because AT is provided to or on behalf of an entity that has an obligation to provide the AT such as schools under IDEA or VR agencies/clients)	<i>Mandatory explanation</i>
E. Number of Individuals Included in Performance Measures	<i>ii System-generated</i>

(ii = i minus excluded number D.)

If a number is reported in D you must provide a description of the reason the individuals are excluded from the performance measure: _____

3. Savings to Consumers, by Type of AT Device/Service

Use the table below to provide information on the number of devices or services provided to consumers and the savings to consumers resulting from this activity, by type of AT device or service. Report each device or service in only one category. Because a single recipient may acquire more than one device or service, the number of devices and services reported in this table may exceed the number of recipients. Refer to the Instruction Manual for decision rules on how to classify devices and services.

For each type of AT device, enter the total estimated current purchase price of the devices and the total amount for which devices were sold. The system will calculate the resulting savings to consumers. Use the Manufacturer’s Suggested Retail Price (MSRP) to determine the current purchase price of the device. If you are unable to find the exact price for a particular item, use the value of a comparable device. Using estimates is acceptable when exact pricing is not available. In the case of fabrication or AT maker programs you will use the retail price of a comparable product to that which is being fabricated/made. In some cases, you may need to identify multiple similar devices and average to estimate a MSRP. If the device was given away, use a sale price of zero in your calculations.

For large building access projects, the numbers reported should reflect a logical access grouping (e.g., a bathroom modification or exterior ramping of a house would each be one home modification). Where funding was provided for an AT service (such as an evaluation), include that dollar amount in the appropriate AT category associated with the service (e.g., an audiological evaluation would go in the “hearing” category).

Type of AT Device/Service	Number Provided	Total Estimated Current Retail Purchase Price	Total Price for Which Devices Were Sold	Savings to Consumers
Vision				<i>System-generated</i>
Hearing				<i>System-generated</i>
Speech communication				<i>System-generated</i>
Learning, cognition, and developmental				<i>System-generated</i>
Mobility, seating and positioning				<i>System-generated</i>
Daily living				<i>System-generated</i>
Environmental adaptations				<i>System-generated</i>
Vehicle modification and transportation				<i>System-generated</i>
Computers and related				<i>System-generated</i>
Recreation, sports, and leisure				<i>System-generated</i>
Total	<i>System-generated</i>	<i>System-generated</i>	<i>System-generated</i>	<i>System-generated</i>

D. Anecdote

Provide at least ONE anecdote about an individual who benefited from a state financing activity. Do not provide more than TWO anecdotes. If you have a picture to accompany the narrative you submit, please check the box provided. Each narrative is limited to 1800 characters. Please check the area (education, employment, or community living) of the outcome/impact of the anecdote.

(Narrative item #1)

Impact area: Education Employment Community Living

If you have a picture to accompany anecdote #1, please add here with alt text.

(Narrative item #2)

Impact area: Education Employment Community Living

If you have a picture to accompany anecdote #2, please add it here with alt text.

E. Performance Measures

State financing activities are covered by the Acquisition Performance Measure. To collect data for this measure, statewide AT programs will collect follow-up information from consumers. Use data collected from consumers to complete the table below. Refer to the Instruction Manual for guidance on how to categorize the primary purpose for which AT devices/service are needed.

The total number of customers from whom data is reported must equal the sum of the number of individuals to whom financial loans were made (as reported in Section A.1.A) and the number of individual recipients of other state financing activities who are included in performance measures (as reported in Sections B.2.E.ii and C.2.E.ii).

Response	Primary Purpose for Which AT is Needed			Total
	Education	Employment	Community Living	
1. Could only afford the AT through the statewide AT program (n,d)				
2. AT was only available through the statewide AT program (n,d)				
3. AT was available through other programs, but the system was too complex or the wait time was too long (n,d)				
4. Subtotal	<i>System-generated</i>	<i>System-generated</i>	<i>System-generated</i>	
5. None of the above (d)				
6. Subtotal	<i>System-generated</i>	<i>System-generated</i>	<i>System-generated</i>	
7. Nonrespondent (d)				
8. Total	<i>System-generated</i>	<i>System-generated</i>	<i>System-generated</i>	<i>System-generated</i>
9. Performance on this measure	<i>System-generated</i>	<i>System-generated</i>	<i>System-generated</i>	

NOTES: Items marked (n) are included in numerator. Items marked (d) are included in denominator. Non-respondents are included in denominator. (System will generate an error message if total reported in column at far right does not equal total of Sections A.1.A plus B.2.E.ii plus C.2.E.ii)

F. Customer Satisfaction

Use data from customer surveys (which include an item about satisfaction) to complete the table below for all customers served by state financing activities.

Customer Rating of Services	Number of Customers	Percent
Highly satisfied		<i>System-generated</i>
Satisfied		<i>System-generated</i>
Satisfied somewhat		<i>System-generated</i>
Not at all satisfied		<i>System-generated</i>
Nonrespondent		<i>System-generated</i>
Total	<i>System-generated</i>	
Response rate	<i>System-generated</i>	

(System will generate an error message if total does not equal total reported in Sections A.1.A plus B.2.C.i plus C.2.C.i.)

G. Notes

Describe any unique issues that may affect your data in this section (e.g., types of devices/services that may not be financed because they are financed by other programs).

(Narrative item)

--

Reuse

Outline

Overview of Activities Performed

- A. Number of recipients of reused devices
- B. Device exchange activities
- C. Device Reassignment/Refurbishment and Repair Activities
- D. Open-ended loans
- E. Anecdote
- F. Performance measures
- G. Customer satisfaction
- H. Notes

Section 4f requirement: the number, type, estimated value, and scope of assistive technology devices exchanged, repaired, recycled, or reutilized (including redistributed through device sales, loans, rentals, or donations) through the device reutilization activities, and an analysis of the individuals with disabilities that have benefited from the device reutilization activities

Device reuse includes device exchange activities and device refurbishment/repair activities in which the device can be reassigned or placed on open-ended loan where the borrower can keep the device for as long as it is needed. All of these types of reuse are considered a form of “acquisition.”

Device exchange activities are those in which devices are listed in a “want ad”-type posting and consumers can contact and arrange to obtain the device (either by purchasing it or obtaining it for free) from the current owner. Exchange activities do not involve warehousing inventory and do not include sanitation or refurbishing of used devices.

To report all required device exchange data, a Statewide AT Program will need to be able to collect performance measure outcome data. If the device buyer and seller make the exchange transaction without any involvement of the Statewide AT Program it will be challenging to accurately gather and report required performance measure data at the conclusion of the exchange. While an online exchange listing system may be able to automatically collect some data from the seller and/or device listing (category of AT), the State AT Program must be able to confirm the exchange transaction was completed, verify the final sale price of the device, and attempt to collect performance measure data directly from the buyer after the exchange transaction is complete. This will require direct interaction with the end recipient to verify the completed exchange data and request a response to the performance measure. If your exchange program does not provide a mechanism to directly interact with the end recipient of device exchange and collect this required data, you should not report this activity data in the Annual Progress Report.

Device sanitation/refurbishment/repair activities are those in which devices are accepted (usually by donation) into an inventory; are sanitized and/or refurbished as needed; and then offered for sale, open-ended loan, or give away to consumers as redistributed products. Repair activities are those in which device(s) are repaired for an individual (without the ownership of the device changing hands) which prevent the owner from needing to purchase a new device.

Devices in a reuse inventory can be reassigned on a permanent basis to a new “owner” or provided as an open-ended loan to a borrower as long as required to meet a particular need. Open-ended device loans are generally distinguishable from short-term device loans by the length of the typical loan period and/or lack of a set short-term period that is known to be appropriate for the loan. Open-ended loans are generally longer term without a known appropriate end-date and/or the device placed with a consumer on an ongoing basis but without transferring ownership to the consumer.

Devices produced as a result of AT “maker” or fabrication activities MAY be included in reutilization if the fabricated devices are provided as open-ended loans, with the expectation that the devices will be returned to the program’s inventory when no longer needed. In general, however, AT fabrication should be considered as an “other” type of state financing as devices fabricated are frequently made specifically for an individual. In any case, devices produced through maker or fabrication activities must be counted as only one acquisition unless the fabricated device is taken back into the inventory of the reuse program from the original recipient and provided to a new recipient.

Overview of Activities Performed

Did your approved State Plan for this reporting period include conducting any device reuse activities? *Check yes or leave unchecked.*

A. Number of Recipients of Reused Devices

In this table, report the number of recipients who receive devices through device exchange or refurbish/ repair (reassign and/or open-ended loans). Recipients should be reported only once, even if they receive multiple devices as part of a reuse event. Of the recipients reported, identify the number for whom performance measure data cannot be reported. Some entities that have an obligation to provide AT may provide it via reuse. For example, a school has an obligation to provide AT devices identified in an IEP and the school may obtain the device through the reuse program. In this case, the performance measure questions are not answerable by the school because the issues of affordability or availability are not allowable reasons to limit access to AT that has been identified as necessary by the IEP team. You should exclude from the performance measures device recipients who acquire reused devices under these circumstances.

Activity	Number of Individuals Receiving a Device from Activity
A. Device exchange	
B. Device Refurbish/Repair – Reassign and/or Open-Ended Loan	
C. Total Served	<i>i System-generated</i>
D. – Excluded from Performance Measure because AT is provided to or on behalf of an entity that has an obligation to provide the AT such as schools under IDEA or VR agencies/clients)	<i>Mandatory explanation</i>
E. Number of Individuals Included in Performance Measures	<i>ii System-generated</i>

(ii = i minus excluded number D)

If a number is reported in D, you must provide a description of the reason the individuals are excluded from the performance measure: _____

B. Device Exchange Activities

Enter the total number of devices exchanged (listed by one individual/entity and obtained by another) during the reporting period, by AT type. Because a single recipient may acquire more than one device or service, the number of devices and services reported in this table may exceed the number of recipients. For each type of AT device, enter the total estimated current purchase price of the devices and the total amount for which the devices were exchanged. To report a device as “exchanged” you must have documentation of the price for which it was sold or exchanged. Use the Manufacturer’s Suggested Retail Price (MSRP) to determine the current purchase price of the device. If you are unable to find the exact price for a particular item, use the value of a comparable device. You may need to identify multiple similar products and average to identify a MSRP. Using estimates is acceptable when exact pricing information is not available. If the device was given away, use a sale price of zero in your calculations. The system will calculate the resulting savings to consumers in the last column.

Type of AT Device	Number of Devices Exchanged	Total Estimated Current Purchase Price	Total Price for Which Device(s) Were Exchanged	Savings to Consumers
Vision				<i>System-generated</i>
Hearing				<i>System-generated</i>
Speech communication				<i>System-generated</i>
Learning, cognition & developmental				<i>System-generated</i>
Mobility, seating and positioning				<i>System-generated</i>
Daily living				<i>System-generated</i>
Environmental adaptations				<i>System-generated</i>
Vehicle modification & transportation				<i>System-generated</i>
Computers and related				<i>System-generated</i>
Recreation, sports and leisure				<i>System-generated</i>
Total	<i>System-generated</i>	<i>System-generated</i>	<i>System-generated</i>	<i>System-generated</i>

C. Device Refurbish/Repair - Reassignment and/or Open-ended Loan Activities

Enter the total number of devices sanitized/refurbished/repared and acquired by an end user through reassignment or open-ended loan during the reporting period, by type. Because a single recipient may acquire more than one device or service, the number of devices and services reported in this table may exceed the number of recipients. However, multiple devices within the same AT category grouped together for a function should be reported as one device (e.g. multiple components of a functional seating system). For each type of AT device acquired, enter the total estimated current purchase price of the device and total price for which the devices were sold. The system will calculate the savings to consumers. Use the MSRP for the current purchase price of the device. If you are unable to find the exact price for an item, use the value of a comparable device. You may need to identify multiple similar products and average for an MSRP. Using estimates is acceptable when exact pricing is not available. If the device was given away, use a sale price of zero in your calculations.

NOTE: Open-ended loans are reported only once in the reporting period the loan is made; not in subsequent years even if the loan is still open.

Type of AT Device	Number of Devices Sanitized/Repaired /Refurbished	Total Estimated Current Purchase Price	Total Price for Which Devices Were Sold	Savings to Consumers
Vision				<i>System-generated</i>
Hearing				<i>System-generated</i>
Speech communication				<i>System-generated</i>
Learning, cognition and developmental				<i>System-generated</i>
Mobility, seating & positioning				<i>System-generated</i>
Daily living				<i>System-generated</i>
Environmental adaptations				<i>System-generated</i>
Vehicle modification & transportation				<i>System-generated</i>
Computers and related				<i>System-generated</i>
Recreation, sports and leisure				<i>System-generated</i>
Total	<i>System-generated</i>	<i>System-generated</i>	<i>System-generated</i>	<i>System-generated</i>

D. Anecdote

Provide ONE anecdote about an individual who benefited from a reuse activity. For guidance on information to include in the anecdote, please see the Instruction Manual. If you have a picture to accompany the narrative you submit, please check the box provided. Each narrative is limited to 1800 characters. Please check the area (education, employment, or community living) of the outcome/impact of the anecdote.

(Narrative item)

Impact area: **Education** **Employment** **Community Living**

If you have a picture to accompany the anecdote, please add it here.

E. Performance Measures

Device reuse activities are covered by the Acquisition Performance Measure. To report data for this measure, statewide AT programs will collect follow-up information from consumers to complete the tables below. Refer to the Instruction Manual for guidance on how to categorize the primary purpose for which AT devices/services are needed.

Performance measure for exchange, reassignment/refurbishment and repair and open-ended device loan activities should be reported in the table below. The number of customers reported should equal the total number reported in (ii) of Section A.

Response	Primary Purpose for Which AT is Needed			Total
	Education	Employment	Community Living	
1. Could only afford the AT through the statewide AT program (n,d)				

2. AT was only available through the statewide AT program (n,d)				
3. AT was available through other programs, but the system was too complex or wait time was too long (n,d)				
4. Subtotal	<i>System-generated</i>	<i>System-generated</i>	<i>System-generated</i>	
5. None of the above (d)				
6. Subtotal	<i>System-generated</i>	<i>System-generated</i>	<i>System-generated</i>	
7. Nonrespondent (d)				
8. Total	<i>System-generated</i>	<i>System-generated</i>	<i>System-generated</i>	<i>System-generated</i>
9. Performance on this measure	<i>System-generated</i>	<i>System-generated</i>	<i>System-generated</i>	

NOTES: Items marked (n) are included in numerator. Items marked (d) are included in denominator. Nonrespondents are included in the denominator for calculation of performance. (System will generate an error message if total reported in column at far right does not equal total of Section A.ii)

F. Customer Satisfaction

Use data from customer surveys (which include an item about satisfaction) to complete the table below for all customers served by device reuse activities. For exchange activities, you may collect and report satisfaction data from either the device seller or the device recipient in a completed exchange, but not both.

Customer Rating of Services	Number of Customers	Percent
Highly satisfied		<i>System-generated</i>
Satisfied		<i>System-generated</i>
Satisfied somewhat		<i>System-generated</i>
Not at all satisfied		<i>System-generated</i>
Nonrespondent		<i>System-generated</i>
Total surveyed	<i>System-generated</i>	
Response rate	<i>System-generated</i>	

(System will generate an error message if total surveyed is not equal to the number of individuals who acquired a reused device reported in Section A(i).

G. Notes

Describe any unique issues that may affect your data in this section. If you have a device exchange program, please describe your data collection method, any challenges with collecting these data, and plans for overcoming those challenges.

(Narrative item)

Device Loans

Outline

Overview of Activities Performed

- A. Short-Term Device Loans by Type of Purpose
- B. Number of Device Loans by Type of Borrower
- C. Length of short-term device loans
- D. Types of devices loaned
- E. Anecdote
- F. Performance measures
- G. Customer satisfaction
- H. Notes

Section 4f requirement: the number, type, and length of time of loans of assistive technology devices provided to individuals with disabilities, employers, public agencies, or public accommodations through the device loan program...and an analysis of individuals with disabilities who have benefited from the device loan program

Statewide AT programs provide short-term loans of AT devices to individuals or entities. The loan purpose may be to assist in decision making, to serve as a loaner while the consumer is waiting for device repair or funding, to provide an accommodation on a short-term basis for a time-limited event, for educational/training, or other professional development activities. Loans for the purpose of decision-making should be included in the access performance measure. Loans for all other purposes: providing a device during repair, while waiting for funding, providing an accommodation for a time-limited event, and educational/training or personnel development should be included in the acquisition performance measure.

In this section, report only on short-term loans in which devices are borrowed for a limited or prescribed amount of time for one of the four purposes described in Section A. Based on national data, typical short-term loan periods range from between 30 and 45 calendar days. Device loans for significantly longer periods should be reviewed as possible open-ended loans, especially when the loan structure is done as an alternative to device ownership transferring to the consumer. Open-ended device loans, in which the device borrower can keep the device for as long as it is needed, should be reported under “Device Reuse.”

Overview of Activities Performed

Did your approved State Plan for this reporting period include conducting short-term device loans? *check yes or leave unchecked.*

A. Short-Term Device Loans by Type of Purpose

In this section, report the total number of short-term device loans made during the reporting period. A loan (counted as one) is defined as an occasion on which a device or devices were borrowed by an individual/entity who will use the device for one of the following purposes --

- 1) To make a decision (one decision even if multiple devices in the same AT category were borrowed) based on data, judgments, and other relevant information gained from trial use of the device in a natural environment with technical assistance available, upon request, from someone who has technical expertise related to the device(s) borrowed.

- 2) To provide loaner equipment during device repair or while waiting for funding (no decision is involved).
- 3) To provide an accommodation for a time-limited event such as a meeting or situation such as a hospital stay (no decision is involved). Device loans that provide an accommodation for a longer period of time should be carefully reviewed to ensure it is indeed a short-term loan and not more of an open-ended loan (reported in reuse) in which the borrower needs to use the device for a longer period of time.
- 4) To conduct educational/training activities, self-education, or other professional development activities (no decision involved).

The number of short-term device loans will equal the number of borrowers reported in B, as each loan will be classified by the type of individual or entity that borrows. The number of loans will NOT necessarily equal the number of devices borrowed as reported in D as there may be multiple devices borrowed within a single loan event. A device loan event for decision-making is defined by the decision to be made. In general, the decision will be based on borrowing one or more devices within a single AT category in which the device loan event is reported. The same individual may borrow multiple vision devices at the same time or across time (borrow one device, return it, borrow another, return it) to make one overall decision which is one loan event with multiple devices and one decision outcome. Or the same individual can borrow multiple vision devices (same or across time) and the purpose is separate decisions (e.g. a provider is borrowing to make decisions on behalf of different beneficiaries which is multiple loan events.) It is critical to identify the purpose of the device loan first so that the loan event data can be structured to collect accurate data for that event. If a loan is extended it should not be counted as a separate loan unless the extension creates a new, separate loan event purpose.

Report the number of short-term device loans made by primary purpose of the loan. Count each loan in only one category, even if the loan included multiple devices. If at least one device included in the loan was borrowed for decision-making, report the loan in the first row.

Primary Purpose of Short-Term Device Loan	Number of Loans
1. Assist in decision making (device trial or evaluation)	<i>Access Performance Measure</i>
2. Serve as loaner during device repair or while waiting for funding	<i>Acquisition Performance Measure</i>
3. Provide an accommodation on a short-term basis for a time-limited event/situation	<i>Acquisition Performance Measure</i>
4. Conduct education/training or other professional development activity	<i>Acquisition Performance Measure</i>
Total	<i>i. System-generated</i>

B. Number of Device Loans by Type of Borrower

In this section, report the number of device loans by type of borrowers - type of individual or entity by decision-making purpose and by all other purposes. For guidance on how to categorize borrowers, refer to the Instruction Manual. You must be able to categorize borrowers to report them in this table as there is no option for “unable to categorize” or “other”.

The total number of device borrowers for decision-making purpose (total line i below) must equal Section A line 1 above. The total number of device borrowers for all other purposes (total

line ii below) must equal the sum of Section A lines 2, 3 and 4 above. The total number of device borrowers (total line iii below) must equal the total number of short-term device loans reported above in Section A.

Type of Individual or Entity	Number of Borrowers		
	Decision-making	All other Purposes	Total
Individuals with disabilities			<i>System-generated</i>
Family members, guardians, and authorized representatives			<i>System-generated</i>
Representatives of Education			<i>System-generated</i>
Representatives of Employment			<i>System-generated</i>
Representatives of Health, allied health, and rehabilitation			<i>System-generated</i>
Representatives of Community Living			<i>System-generated</i>
Representatives of Technology			<i>System-generated</i>
Total	<i>i. System-generated</i>	<i>ii. System-generated</i>	<i>iii. System-generated</i>

C. Length of Short-Term Device Loans

Enter the standard length of loan established by your AT Program policies/procedures not including extensions. Please report the length in calendar days. If your policy/procedures establish a range, use the midpoint. Please note this is NOT actual days, it is your policy period.

Length of short-term device loan, in days: *(Numeric field)*

D. Types of Devices Loaned

Enter the number of devices that were loaned by device type for decision-making and for all other purposes. For guidance on how to categorize devices, refer to the Instruction Manual. The number of devices loaned may exceed the number of loans reported in Section A since one loan may include more than one device. The total of i. must be greater than or equal to Section A line 1 and ii must be greater than or equal to the sum of lines 2, 3 and 4 in Section A.

Type of AT Device	Number of Devices		
	Decision-making	All other Purposes	Total
Vision			<i>System-generated</i>
Hearing			<i>System-generated</i>
Speech communication			<i>System-generated</i>
Learning, cognition, and developmental			<i>System-generated</i>
Mobility, seating and positioning			<i>System-generated</i>
Daily living			<i>System-generated</i>
Environmental adaptations			<i>System-generated</i>
Vehicle modification and transportation			<i>System-generated</i>
Computers and related			<i>System-generated</i>
Recreation, sports, and leisure			<i>System-generated</i>
Total	<i>i. System-generated</i>	<i>ii. System-generated</i>	<i>iii. System-generated</i>

E. Anecdote

Provide ONE anecdote about an individual who benefited from a device loan activity. For guidance on information to include in the anecdote, please see the Instruction Manual. If you have a picture to accompany the narrative you submit, please check the box provided. Each narrative is limited to 1800 characters. Please check the area (education, employment, or community living) of the outcome/impact of the anecdote.

(Narrative item)

Impact area: Education Employment Community Living

If you have a picture to accompany the anecdote, please add it here.

F. Access Performance Measures

Device loan activities for a decision-making purpose are covered by the Access Performance Measure. To collect data for this measure, statewide AT programs will collect access performance measure data from all borrowers who obtained device loans for the purpose of decision-making (the number reported in Section B i.). That data will be used to complete the table below. Refer to the Instruction Manual for guidance on how to categorize the primary purpose for which AT devices/services are needed.

Response	Primary Purpose for Which AT is Needed			Total
	Education	Employment	Community Living	
1. Decided that an AT device/service will meet needs (n,d)				
2. Decided that an AT device/service will not meet needs (n,d)				
3. Subtotal	<i>System-generated</i>	<i>System-generated</i>	<i>System-generated</i>	
4. Have not made a decision (d)				
5. Subtotal	<i>System-generated</i>	<i>System-generated</i>	<i>System-generated</i>	
6. Nonrespondent (d, if > 35%)				
7. Total	<i>System-generated</i>	<i>System-generated</i>	<i>System-generated</i>	<i>System-generated</i>
8. Performance on this measure	<i>System-generated</i>	<i>System-generated</i>	<i>System-generated</i>	

NOTES: Items marked (n) are included in numerator. Items marked (d) are included in denominator. Nonrespondents in excess of 35% are included in the denominator for calculation of performance. (System will generate an error message if total reported in column on far right does not equal total reported in Section B.i.)

G. Acquisition Performance Measures

Device loan activities for the purpose of providing loaner equipment during device repair or while waiting for funding, for providing an accommodation for a time-limited event, and for

professional development activities are covered by the Acquisition Performance Measure. To report data for this measure, statewide AT programs will collect follow-up information from borrowers to complete the table below. Refer to the Instruction Manual for guidance on how to categorize the primary purpose for which AT devices/services are needed. The number of borrowers reported must equal the total number reported in Section B ii.

Response	Primary Purpose for Which AT is Needed			Total
	Education	Employment	Community Living	
1. Could only afford to borrow the AT through the statewide AT program (n,d)				
2. AT was only available through the statewide AT program (n,d)				
3. AT was available to borrow from other programs, but the system was too complex or the wait time was too long (n,d)				
4. Subtotal	<i>System-generated</i>	<i>System-generated</i>	<i>System-generated</i>	
5. None of the above (d)				
6. Subtotal	<i>System-generated</i>	<i>System-generated</i>	<i>System-generated</i>	
7. Nonrespondent (d if > 35%)				
8. Total	<i>System-generated</i>	<i>System-generated</i>	<i>System-generated</i>	<i>System-generated</i>
9. Performance on this measure	<i>System-generated</i>	<i>System-generated</i>	<i>System-generated</i>	

NOTES: Items marked (n) are included in numerator. Items marked (d) are included in denominator. Nonrespondents are included in the denominator for calculation of performance. (System will generate an error message if total reported in column at far right does not equal total of Section B ii.)

H. . Customer Satisfaction

Use data from customer surveys (which include an item about satisfaction) to complete the table below for all borrowers served by device loans (total in A.i.)

Customer Rating of Services	Number of Customers	Percent
Highly satisfied		<i>System-generated</i>
Satisfied		<i>System-generated</i>
Satisfied somewhat		<i>System-generated</i>
Not at all satisfied		<i>System-generated</i>
Nonrespondent		<i>System-generated</i>
Total	<i>System-generated</i>	
Response rate	<i>System-generated</i>	

I. Notes

Describe any unique issues that may affect your data in this section (e.g., types of devices that are not loaned because those loans are available from another source, or types of devices that are not loaned because your inventory does not include those devices, difficulty obtaining data from intermediaries, etc.)

<i>(Narrative item)</i>

Device Demonstrations

Outline

Overview of Activities Performed

- A. Number of Device Demonstrations by Device Type
- B. Types of participants
- C. Number of referrals
- D. Anecdote
- E. Performance measures
- F. Customer satisfaction
- G. Notes

Section 4f requirement: the number and type of device demonstrations and referrals provided and an analysis of individuals with disabilities who have benefited from the demonstrations and referrals

Device demonstrations compare the features and benefits of a particular AT device or category of devices for an individual or small group of individuals. The purpose of a device demonstration is to enable an individual to make an informed choice. Whenever possible, the participant should be shown a variety of devices to compare features to support decision making.

Device demonstrations should not be confused with educational/training activities during which devices are demonstrated. Educational/training activities are instructional events designed to increase knowledge, skills, and competencies, generally for larger audiences or targeted instruction for a small group focused on skill development whereas device demonstrations are for decision-making purposes. Device demonstrations also should not be confused with public awareness activities at which devices are demonstrated. The key difference is that device demonstrations are intended to enable an individual to make an informed choice rather than merely making him or her aware of a variety of AT.

In a device demonstration individual, guided experience with the device(s) is provided to the participant decision-maker with the assistance of someone who has technical expertise related to the device(s). This expert may be in the same location as the participant or may assist the participant through Internet or distance learning mechanism that provides real-time, effective communication to deliver the necessary device exploration. A demonstration is characterized by its interactive nature whereby the participant can interact with an expert to increase their knowledge and understanding about the details and functions of a device; the participant drives the demonstration and has the ability to interact and have their individual questions about the device addressed. If the demonstration is conducted via the internet or distance learning mechanism it must be a real-time, interactive demonstration that provides one-on-one assistance to the participant. A web-based demonstration that is archived or is a static presentation without interaction is considered an awareness activity, not a demonstration.

If a demonstration is to be conducted without the participant having direct (hands-on) access to the devices to be demonstrated, the interaction must be structured to ensure the device can be adequately explored to enable decision-making. For many types of AT devices, it will not be possible to provide adequate interaction in a demonstration without the device being in the hands of the participant. For example, a demonstration of a daily living aid like a “pill minder” might be done with the participant asking the demonstrator to fill, set and use the device while they watched on interactive video that might provide adequate information for decision-making.

However, having a demonstrator “show” a Braille note taker to an individual with a vision disability via interactive video would not be adequate.

Following a device demonstration, provision of information about a specific source where the customer may obtain additional information or services related to the devices demonstrated is reported as a referral. A referral must provide a consumer with information on how to contact that source directly. Referrals may be made to funding sources, service providers, vendors or repair services. Do not include referrals to other components of your Statewide AT Program. Report only on referrals that result from demonstration activities, not referrals made through an information and referral service.

Overview of Activities Performed

Did your approved State Plan for this reporting period include conduct device demonstrations? *Check yes or leave unchecked.*

A. Number of Device Demonstrations by Device Type

In this section, report the number of device demonstrations by type of device/service demonstrated during this reporting period. For guidance on how to categorize devices and services, refer to the Instruction Manual. A device demonstration (counted as one) is defined as an occasion in which one or more devices within one AT category are demonstrated to an individual or small group one of whom will make a decision (one decision) based on data, judgments, comparisons and other relevant information gained from the interaction with the equipment and demonstrator. The number of device demonstrations will NOT necessarily equal the number of demonstration participants reported in B as there may be multiple participants in a demonstration even though only one decision will be made by the identified decision-maker participant. Most often the decision-maker is the individual with a disability who is exploring devices to meet their own needs. Other decision-makers include parents on behalf of their children and providers on behalf of agencies who are acquiring a device on behalf of a client.

Type of AT Device/Service	Number of Demonstrations of this Type of AT Device/Service
Vision	
Hearing	
Speech communication	
Learning, cognition, and developmental	
Mobility, seating and positioning	
Daily living	
Environmental adaptations	
Vehicle modification and transportation	
Computers and related	
Recreation, sports, and leisure	
Total	<i>System-generated</i>

B. Types of Participants

In the table below, enter the number of individuals who participated in a device demonstration, by type. For guidance on how to categorize participants, refer to the Instruction Manual. Report the type of individual who is making the decision for the demonstration (an individual with a disability on their behalf or other individual or behalf of an individual with a disability) separately from all other participants. The total number of decision-making participants (i. below) must equal the total number of demonstrations above in Section A since there is one decision-maker identified for each demonstration event who must provide the performance measure outcome.

Type of Participant	Decision-maker	Other Participants	Total
Individuals with disabilities			<i>System-generated</i>
Family members, guardians, authorized representatives			<i>System-generated</i>
Representatives of Education			<i>System-generated</i>
Representatives of Employment			<i>System-generated</i>
Representatives of Health, allied health, rehabilitation			<i>System-generated</i>
Representatives of Community Living			<i>System-generated</i>
Representatives of Technology			<i>System-generated</i>
Total	<i>i. System-generated</i>	<i>System-generated</i>	<i>System-generated</i>

C. Number of Referrals

In this section, report the number of referrals made to each type of entity. Since participants in a demonstration may receive more than one referral, or may not be referred at all, the number of referrals may be greater or less than the number of participants and number of demonstrations. Do not include referrals to other components of your Statewide AT Program

Type of Entity	Number of Referrals
Funding source (non-AT program)	
Service provider	
Vendor	
Repair service	
Others	

D. Anecdote

Provide ONE anecdote about an individual who benefited from a device demonstration. For guidance on information to include in the anecdote, see Instruction Manual. If you have a picture to accompany the narrative, please check the box provided. Each narrative is limited to 1800 characters. Please check the area (education, employment, or community living) of the outcome/impact of the anecdote.

(Narrative item)

Impact area: **Education** **Employment** **Community Living**

If you have a picture to accompany the anecdote, please add it here.

E. Performance Measures

Device demonstrations are covered by the access performance measure. To collect data for this measure, statewide AT programs will collect data from the identified decision-maker who participated in demonstrations (one per demonstration as reported in Item A). That data will be used to complete the table below. Refer to the Instruction Manual for guidance on how to categorize the primary purpose for which AT devices/services are needed.

Response	Primary Purpose for Which AT is Needed			
	Education	Employment	Community Living	Total
1. Decided that an AT device/service will meet needs (n,d)				
2. Decided that an AT device/service will not meet needs (n,d)				
3. Subtotal	<i>System-generated</i>	<i>System-generated</i>	<i>System-generated</i>	
4. Have not made a decision (d)				
5. Subtotal	<i>System-generated</i>	<i>System-generated</i>	<i>System-generated</i>	
6. Nonrespondent (d)				
7. Total	<i>System-generated</i>	<i>System-generated</i>	<i>System-generated</i>	<i>System-generated</i>
8. Performance on this measure	<i>System-generated</i>	<i>System-generated</i>	<i>System-generated</i>	

NOTES: Items marked (n) are included in numerator. Items marked (d) are included in denominator. Non-respondents are included in the denominator for calculation of performance. (System will generate an error message if total reported in column on far right does not equal total reported in Section A.)

F. Customer Satisfaction

Use data from customer surveys (which include an item about satisfaction) to complete the table below for all customers served by device demonstration.

Customer Rating of Services	Number of Customers	Percent
Highly satisfied		<i>System-generated</i>
Satisfied		<i>System-generated</i>
Satisfied somewhat		<i>System-generated</i>
Not satisfied		<i>System-generated</i>
Nonrespondent		<i>System-generated</i>
Total	<i>System-generated</i>	
Response rate	<i>System-generated</i>	

(System will generate an error message if total does not equal total reported in Section B.)

G. Notes

Describe any unique issues that may affect your data in this section (e.g., types of participants that may appear to be underrepresented because they receive demonstration services from another organization, types of devices/services that are not demonstrated because those demonstrations are available from another source, issues related to use of distance education mechanisms to deliver demonstrations, or issues related to dissatisfaction (e.g.; consumer may be dissatisfied because they assumed the AT Program could purchase the device for them).

(Narrative item)

National Outcome Measures (ACL targets for national aggregate data)

Performance measure outcomes from each of the four state level activities are summed in the following tables for one overall acquisition and one overall access performance measure percentage. ACL began using this overall performance measure percentage for aggregate AT Program evaluation in FY18. The ACL National Target identified in each performance measure table is applied to summed national aggregate data for all 56 Section 4 grantees not to individual grantees as a met/not met criteria. It is provided in the acquisition and access performance measure tables below for informational purposes to be used at the discretion of the grantee.

The consumer satisfaction rating and response rates from each of the four state level activities are also summed in the last table. ACL began using an overall consumer satisfaction and response rate for aggregate AT Program evaluation in FY18. The ACL National Targets identified in the consumer satisfaction rating and response rate table is applied to summed national aggregate data for all 56 Section 4 grantees not to individual grantees as a met/not met criteria. It is provided in the consumer satisfaction tables below for informational purposes to be used at the discretion of the grantee.

Overall Acquisition Performance Measure

The overall acquisition performance measure is the sum of State Financing, Reuse and Short-term Device Loan (all purposes except decision-making) data and is used ONLY for national aggregate outcome purposes. This overall calculation includes only lines 1 and 2 in the numerator as it represents the percentage of recipients who were unable to afford or otherwise obtain the AT needed without the State AT Program.

Response	Primary Purpose for Which AT is Needed			Total
	Education	Employment	Community Living	
1. Could only afford the AT through the statewide AT program	<i>System-generated</i>	<i>System-generated</i>	<i>System-generated</i>	<i>System-generated</i>
2. AT was only available through the statewide AT program	<i>System-generated</i>	<i>System-generated</i>	<i>System-generated</i>	<i>System-generated</i>
3. AT was available through other programs, but the system was too complex, or the wait time was too long	<i>System-generated</i>	<i>System-generated</i>	<i>System-generated</i>	<i>System-generated</i>
4. Subtotal	<i>System-generated</i>	<i>System-generated</i>	<i>System-generated</i>	<i>System-generated</i>
5. None of the above	<i>System-generated</i>	<i>System-generated</i>	<i>System-generated</i>	<i>System-generated</i>
6. Subtotal	<i>System-generated</i>	<i>System-generated</i>	<i>System-generated</i>	<i>System-generated</i>
7. Nonrespondent	<i>System-generated</i>	<i>System-generated</i>	<i>System-generated</i>	<i>System-generated</i>
8. Total	<i>System-generated</i>	<i>System-generated</i>	<i>System-generated</i>	<i>System-generated</i>
9. Performance on this measure	<i>System-generated</i>	<i>System-generated</i>	<i>System-generated</i>	<i>System-generated</i>
10. ACL National Target				85%

Overall Access Performance Measure

The overall access performance measure is the sum of Short-term Device Loan (decision-making purpose) and Device Demonstration performance measure data.

Response	Primary Purpose for Which At is Needed			Total
	Education	Employment	Community Living	
1. Decided that an AT device/service will meet needs	<i>System-generated</i>	<i>System-generated</i>	<i>System-generated</i>	<i>System-generated</i>
2. Decided that an AT device/service will not meet needs	<i>System-generated</i>	<i>System-generated</i>	<i>System-generated</i>	<i>System-generated</i>
3. Subtotal	<i>System-generated</i>	<i>System-generated</i>	<i>System-generated</i>	<i>System-generated</i>
4. Have not decided	<i>System-generated</i>	<i>System-generated</i>	<i>System-generated</i>	<i>System-generated</i>
5. Subtotal	<i>System-generated</i>	<i>System-generated</i>	<i>System-generated</i>	<i>System-generated</i>
6. Nonrespondent	<i>System-generated</i>	<i>System-generated</i>	<i>System-generated</i>	<i>System-generated</i>
7. Total	<i>System-generated</i>	<i>System-generated</i>	<i>System-generated</i>	<i>System-generated</i>
8. Performance on this measure	<i>System-generated</i>	<i>System-generated</i>	<i>System-generated</i>	<i>System-generated</i>
9. ACL National Target				90%

Overall Satisfaction Rating

The overall satisfaction rating is the sum of all four state level activities (State Financing, Reuse, Short-term Device Loan and Device Demonstration) satisfaction data. It represents the number of program beneficiaries who are highly satisfied or satisfied with state level activity services they received from the State AT Program.

Customer Rating of Services	Percent	ACL National Target
Highly satisfied and satisfied	<i>System-generated</i>	95%
Response rate	<i>System-generated</i>	90%

Educational /Training Activities

Outline

Overview of Activities Performed

- A. Educational/Training participants: Number and types of participants; geographical distribution
- B. Educational/Training topics
- C. Description of educational/training activities
- D. Notes

Section 4f requirements: Educational Activities/Training

1. "the number and general characteristics of individuals who participated in educational activities ... (such as individuals with disabilities, parents, educators, employers, providers of employment services, health care workers, counselors, other service providers, or vendors)"

2. "the topics of such educational activities"

3. "to the extent practicable, the geographic distribution of individuals who participated in the educational activities."

Transition: No explicit reporting requirement in Section 4f, but Section 4e includes requirement that statewide AT programs provide educational activities and technical assistance to assist students with disabilities who receive transition services under IDEA and adults with disabilities maintaining or transitioning to community living. Section e also requires that at least 5% of the money spent on State Leadership activities be used for transition activities.

The AT Act of 1998, as amended in 2004 provided a combined description of training and technical assistance. The 21st Century Assistive Technology Act, enacted 12/23/2022, reauthorized the program and changed the term "training" to "educational activities." In general, education provides theoretical knowledge while training provides practical skills, and the APR has historically defined training as inclusive of both. Following is guidance on what activities to report in this section and how to distinguish educational/training activities from public awareness or technical assistance activities. Report each activity only once, in the appropriate section.

This section of the reporting form also collects information on educational/training activities that are related to transition. Information on technical assistance activities related to transition should be reported in that section of the form. Reminder: each Statewide AT Program must report on at least one transition activity related to school transition (e.g., secondary school to post-school) AND one transition activity related to community living transition (e.g., congregate living to community living). The activity reported may be either an educational/training event or a technical assistance initiative.

Educational/training activities are instructional events, usually planned in advance for a specific purpose or audiences, which are designed to increase participants' knowledge, skills, and competencies regarding AT. Such events can be delivered to large or small groups, in-person, or via telecommunications or other distance education mechanisms. In general, participants in educational/training activities can be individually identified and could complete an evaluation of the educational/training event. Examples of educational/training activities include classes, workshops, and presentations that have a goal of increasing skills, knowledge, and competency, as opposed to something intended only to increase general awareness of AT.

Distinguishing Educational/Training Activities from Public Awareness Activities

Educational/training activities have more depth and breadth than public awareness activities and are focused on skill building and competency development. If the purpose of an

educational/training session is to create awareness, the session should be classified as a public awareness activity. In general, participants in educational/training events can be individually identified, while in awareness activities, it may not be possible to identify each participant individually.

Working with individual consumers on how to use a particular AT device or troubleshooting problems with devices should be reported under “Information and Assistance.”

Distinguishing Educational/Training Activities from Technical Assistance

Educational/Training activities are designed to teach, present, or guide individuals to impart knowledge, skills, and competencies. Technical assistance is focused on providing extensive assistance to state or local agencies or other entities (rather than individuals) and generally involves problem solving to achieve a mutually agreed-upon goal. Technical assistance typically involves multiple contacts and interactions over an extended period.

In some cases, educational/training activities may be a component of technical assistance. Educational/training activities provided as part of technical assistance can be reported here, but only if the educational/training activity was supplemented by other technical assistance activities. If an educational/training activity was the only technical assistance service provided, it can be reported as either educational/training or technical assistance, but not both.

Overview of Activities Performed

Educational/Training activities are required and must be reported as described below.

A. Educational/Training Participants: Number and Types of Participants; Geographical Distribution

1. Enter the number of educational/training participants by type. The participant may self-determine the appropriate descriptor for themselves, or such information may be derived from other educational/training event records. Use “unable to categorize” when no data can be obtained on type of participant.

Type of Participant	Number
Individuals with disabilities	
Family members, guardians, and authorized representatives	
Representative of Education	
Representative of Employment.	
Representative of Health, allied health, and rehabilitation	
Representative of Community Living	
Representative of Technology	
Unable to Categorize	
Total	

2. Enter the number of individuals who participated in educational/training events, by the Rural Urban Continuum Code (RUCC) of the participant’s county. For a consumer, you determine the RUCC by the county in which he or she resides. For a representative, you determine the RUCC by the county in which they generally provide services.

Participants for whom you cannot determine a county are counted in “Unknown.” For additional guidance on the RUCC, refer to the Instruction Manual.

Metro (RUCC 1-3)	Non-Metro (RUCC 4-9)	Unknown	TOTAL

The Total in A (2) above must equal the Total of A (1)

Educational/Training Topics

Enter the number of participants by the primary content of the educational/training event organized into the following categories:

1. AT products and services, which includes subcategories of AT types.
2. AT funding, policy, and practice, which includes subcategories of common topics in this category and space other related AT topics.
3. Information and Communication Technology (ICT) Accessibility including web access, software accessibility, procurement of accessible ICT, and similar. **For participants in this topic, you will need to collect a performance measure, see below.)**
4. Combination of AT products and services, AT funding, policy, and practice and/or IT/Telecommunications. (Use this category only when absolutely necessary.)
5. Transition, including transition from school to work or postsecondary education and transition to community living. (Use this category for ALL transition activities even if they could be reported as AT Products/Services, AT Funding/Policy, etc.)

Primary Topic of Educational/Training Activities	Number of Educational/Training Participants
1. AT Products/Services Focused on AT: such as instruction to increase skills and competency in using AT, and integrating AT into different settings	
2. AT Funding/Policy/ Practice Focused on funding sources and related laws, policies, and procedures required to implement and deliver access to AT devices/services and related.	
3 Combination of 1 and 2 above AT Products/Services and AT Funding/ Policy/Practice	
4.Information and Communication Technology (ICT) Accessibility Focused on accessible information and communication technology (ICT) including web access, software accessibility, procurement of accessible ICT	<i>A performance measure must be collected for these participants</i>
5. Transition Focused on education transition (school to work or post-secondary education and early intervention (birth to 3) to school aged (3 -21) and community transition (maintaining or transitioning to community living). (Note: A number must be reported here unless transition technical assistance is reported.)	<i>If a number is reported here, a description must be provided in C.2. below.</i>
Total	<i>System-generated</i>

The Total Number of Educational/Training Participants must equal the Total in A (1) and A(2).

B. Description of Educational/Training Activities

1. Briefly describe one innovative or high-impact educational/training activity conducted during this reporting period. Note who conducted the event (e.g., type of expertise of staff) and characteristics of the audience (including number that attended). In one sentence, describe the topic, content, and/or approach of the event. In another sentence, summarize the positive result or intended impact of the event. Do not include overall descriptions of conferences held unless the conference had a unique purpose/outcome.

Narrative item- Each narrative is limited to 3000 characters.

2. Briefly describe an educational/training activity related to transition conducted during this reporting period. Note who conducted the event (e.g., expertise of staff) and characteristics of the audience (including number that attended). In one sentence, describe the topic, content, and/or approach of the event. In another sentence, summarize the positive result or intended impact of the event. Do not include overall conference descriptions absent a unique purpose/outcome. This section must be completed unless you report transition technical assistance activities. If this section is completed, an associated number of participants must be reported in Section B Row 5.

Narrative item- Each narrative is limited to 3000 characters.

3. Briefly describe an educational/ training activity related to Information and Communication Technology (ICT) accessibility conducted during this reporting period. Note who conducted the event (e.g., expertise of staff) and characteristics of the audience (including number that attended). In one sentence, describe the topic, content, and/or approach of the event. In another sentence, summarize the positive result or intended impact of the event. This section must be completed if you have attendees reported in the ICT accessibility topic area in Section B Row 4.

Narrative item- Each narrative is limited to 3000 characters.

D. Information & Communication Technology (ICT) Accessibility Performance Measure

Outcome/result from ICT Accessibility Education/Training Received	Number
ICT accessibility procurement or development policies, procedures, or practices will be improved or better implemented to ensure accessibility. (n,d)	
Education/Training or technical assistance activities will be developed or implemented to ensure accessibility of ICT. (n,d)	
No known outcome at this time. (d)	
Non-respondent (d)	
TOTAL (must equal number reported in Section B.3)	<i>System-generated</i>
Performance Measure Percentage	<i>System-generated</i>

E. Notes

Describe any unique issues that may affect the data in this section, (e.g. why particular topics or audiences were emphasized or were not included during this reporting period).

(Narrative item)

Technical Assistance

Outline

Overview of Activities Performed

- A. Frequency and nature of technical assistance
- B. Description of technical assistance activities
- C. Notes

Section 4f requirements:

Technical Assistance

“The frequency of provision and nature of technical assistance provided to State and local agencies and other entities.”

Transition: No explicit reporting requirement in Section 4f, but Section 4e includes requirement that AT programs provide educational/training activities and technical assistance to assist students with disabilities who receive transition services under IDEA and adults with disabilities maintaining or transitioning to community living. Section e also requires that at least 5% of the money spent on State Leadership activities be used for transition activities.

The 21st Century Assistive Technology Act provides a combined description of educational/training and technical assistance activities. Additional descriptions of technical assistance are provided below, along with guidance for distinguishing technical assistance from public awareness and educational/training activities.

Technical Assistance (TA) is defined as direct problem-solving service provided by Statewide AT Program staff to assist programs and agencies in improving their services, management, policies, and/or outcomes. TA may be provided in person, by electronic media such as telephone, video, or e-mail, and by other means. The following are examples of technical assistance needs assessment, program planning or development, curriculum or materials development, administrative or management consultation, program evaluation and site reviews of external organizations, and policy development.

Mandatory transition activities that are technical assistance are reported in this section; mandatory transition activities that are educational/training are reported in that section. Reminder- each Statewide AT Program must report on at least one transition activity related to school transition (e.g., secondary school to post-school) AND one transition activity related to community living (e.g. maintaining or transitioning to community living). The activity reported may be either an educational/training event or a technical assistance initiative.

Distinguishing Technical Assistance from Information & Assistance

Technical assistance is provided to agencies or other organizations, not to individuals. Intensive support provided to an individual, for example assisting an individual troubleshoot problems with an AT device or address a funding issue, is reported under information and assistance. Technical assistance typically includes multiple contacts/interactions over an extended period with an agency or organization. Less intensive support services, including single-contact requests for information or limited assistance from agencies or organizations should also be reported under information and assistance.

Distinguishing Technical Assistance from Educational/Training Activities

Educational/Training activities are designed to teach, present, or guide individuals in order to impart knowledge, skills, and competencies to individuals, while technical assistance may be designed to help entities (not individuals) improve their policies, practices, and procedures and generally involve problem solving.

In some cases, educational/training activities may be a component of technical assistance. Educational/Training events provided as part of technical assistance can be reported in the training section, but only if the educational/training activity was supplemented by other technical assistance activities. If an educational/training activity was the only technical assistance service provided, it can be reported as either educational/training or technical assistance, but not both.

Overview of Activities Performed

Technical Assistance activities are required, and all activities should be reported in the aggregate in Section A. One TA activity must be described in Section B and a transition TA activity must be reported unless a transition educational/training activity was reported.

A. Frequency and Nature of Technical Assistance

Complete this section summarizing all major technical assistance activities that you conducted. Indicate the percentage of total technical assistance provided by the type of program or agency receiving the technical assistance. Use the person hours invested in each technical assistance activity to report the percentage by type of program or agency. For example, if you conducted two major TA activities this reporting period with 90 total person hours for an activity related to education and 50 person hours for an activity related to employment, you would report 64% in education and 36% in Employment.

Program or agency receiving technical assistance	Percentage of all TA
Education	
Employment	
Health, Allied Health, Rehabilitation	
Community Living	
Technology (Information Technology, Telecommunications, Assistive Technology)	
Total	Must equal 100%

B. Description of Technical Assistance Activities

In Item 1 below, describe an innovative or high-impact technical assistance activity that is not related to transition. For this item, choose a technical assistance activity that had an outcome. In Item 2 below, describe a technical assistance activity that is related to transition. The transition technical assistance activity is not required to have an outcome.

1. Describe in detail one innovative or high-impact technical assistance activity conducted during this reporting period. Note who provided the technical assistance (e.g., type of expertise of staff) and characteristics of the recipient agency. In two sentences: (1) describe

the topic, content, and/or approach of the technical assistance; and (2) summarize the positive result or impact of the technical assistance.

Narrative item- Each narrative is limited to 3000 characters. .

2. Briefly describe one technical assistance activity related to transition conducted during this reporting period. Note who provided the technical assistance (e.g., type of expertise of staff) and characteristics of the recipient agency. In two sentences: (1) describe the topic, content, and/or approach of the technical assistance; and (2) summarize the positive result or impact of the technical assistance. **NOTE: This section must be completed unless a transition educational/training activity is reported.**

Narrative item- Each narrative is limited to 3000 characters.

C. Notes

Describe any unique issues with data in this section (e.g., reasons why particular topics or audiences were emphasized or were not included during this reporting period).

(Narrative item)

Public Awareness and Information and Assistance

Outline

Overview of Activities Performed

- A. Public awareness activities
- B. Information and Assistance
- C. Notes

Section 4f requirement: "the number of individuals assisted through the public awareness activities and statewide information and referral system".

Public awareness activities are designed to reach large numbers of people, including activities such as public service announcements, radio talk's shows and news reports, newspaper stories and columns, newsletters, brochures, and public forums. Actual numbers of information recipients are often difficult to know for certain, but should be reported when known, and in other cases estimated as accurately as possible. Public awareness activities should be reported, as accurately as possible, in Part A of this section.

Information and assistance include provision of information and supports to individuals and provision of referrals to other entities. All these activities may be provided in person, over the telephone, via email, or other effective communication mechanisms.

Distinguishing Information and Assistance from Device Demonstration Referral

In this section, report only on referrals resulting from information dissemination activities, such as calls to a 1-800 number or e-mails. Referrals resulting from device demonstrations should be reported under device demonstrations.

Distinguishing Public Awareness from Educational/Training Activities

The intended outcome of an activity should determine whether it is reported under public awareness or educational/training activities. Include presentations made for the purpose of general awareness under public awareness. Do not include sessions with the intended outcome of participants applying new knowledge or skills in addressing AT device/service issues (which should be reported under educational/training activities).

Overview of Activities Performed

Public awareness and information and assistance activities are required and must be reported.

A. Public Awareness Activities

In this section report on one or two high impact public awareness activities. This can include newsletters (paper or digital), listservs, blogs, social media, web-based information, public service announcement via television, radio, online broadcasts, podcasts, internet streamed or live presentations, or many other mechanisms designed to disseminate awareness level information to a wide audience. Please remember that presentations reported in this section are for the purpose of general awareness. Educational/training sessions with the intended outcome of participants applying new knowledge or skills in addressing AT device/service issues should be reported as an educational/training activity. (NOTE: Purchasing promotional items is not allowable under OMB Circular direction and as such should not be reported in this section as a public awareness activity.)

Describe in detail at least one and no more than two innovative or high-impact public awareness activities conducted during this reporting period. Highlight the content/focus of the awareness information shared, the mechanism used to disseminate or communicate the awareness information, the numbers and/or types of individuals reached, and positive outcomes resulting from the activity. Also, please identify any partnerships that were used to support the awareness activity (e.g., partnering with AAAs to disseminate information to older adults, with CILs to disseminate information to individuals with disabilities, with professional associations (OT/PT/SLP), etc.) If quantitative numbers are available regarding the reach of the activity, please provide those; however, quantitative data is not required.

(Narrative item) Each narrative is limited to 3000 characters.

(Narrative item) Each narrative is limited to 3000 characters.

B. Information and Assistance

Information and assistance (I&A) activities are those in which the AT program responds to requests for information and/or puts individuals in contact with other agencies, organizations, or companies that can provide them with needed information on AT products, devices, services, or funding sources or provides intensive assistance to individuals about AT products, devices, services, or funding sources. This information may be provided in person, over the telephone, via email, or by some other communication mechanism.

In the table below report the number of individuals to whom you provided information and assistance services by type of individual or entity (see instructions for classification system explanation) and by the content of the information and assistance provided. To the extent practicable each unique request for information and assistance should be counted only once. For the content of the I&A provided, differentiate between --

- Information and assistance about specific AT products, devices, or services, or selecting an AT product, device, or service; and
- Information and assistance that addresses obtaining funding for or otherwise acquiring AT devices and services or providing AT policy/practice information.

Types of Recipients of Information and Assistance	AT Device/ Service	AT Funding/ Policy/Practice	Total
Individuals with disabilities			<i>System-generated</i>
Family members, guardians, and authorized representatives			<i>System-generated</i>
Representative of Education			<i>System-generated</i>
Representative of Employment			<i>System-generated</i>
Representative of Health, Allied Health, and Rehabilitation			<i>System-generated</i>
Representative of Community Living			<i>System-generated</i>
Representative of Technology			<i>System-generated</i>
Unable to Categorize			<i>System-generated</i>
Total	<i>System-generated</i>	<i>System-generated</i>	<i>System-generated</i>

In addition to reporting the quantities of individuals you provided information and assistance to, it is also helpful to know how these individuals learned about the state AT program. Understanding how people are learning about the state AT program enables programs to enhance and refine public awareness and outreach activities. Please provide a narrative description that reflects a qualitative assessment of outreach and education and the types of referrals that increased referrals to the state AT program because of that effort. The description should include:

- Unique strategies and/or partnerships used in the outreach strategy that were particularly helpful in increasing referrals
- Information about the referral source types that were increased as a result of the outreach activity (e.g., increased referrals from agencies such as Area Agencies on Aging (AAA), Centers for Independent Living (CIL), etc. and/or from other types of service providers, such as health care practitioners, educators, rehabilitation counselors, etc.) Numeric data is helpful but not mandatory in describing the increased referral results.

(Narrative item)

It is also helpful to have information about the types of referral sources that are referring people to the AT program for Information and Assistance. The information reported will be valuable in understanding the types of referral sources and identifying opportunities to build and/or strengthen partnerships to expand awareness of state AT programs and serve those with disabilities across all geographies in a state. In the box below please provide a narrative description of the types of entities/practitioners that refer people to the AT program. It is helpful to include estimates on the percentage of the total referrals coming from each referral source in the narrative and the geographical reach of these referral sources. For example, we work with all 30 libraries across the state resulting in statewide coverage and regularly receive referrals from all of them. Approximately 25% of our total referrals for information and assistance come from libraries.

Narrative Item

C. Notes: Describe any issues with your data in this section.

(Narrative item)

Coordination/Collaboration and State Improvement Outcomes

Outline

Overview of Activities Performed

- A. Coordination/Collaboration Partnership Initiatives
- B. State improvement outcome

To improve access to AT across a state, it is understood and expected that AT Programs will coordinate and collaborate with other public and private entities in terms of receiving referrals, sharing information, serving on advisory board, etc. and will provide technical assistance to a variety of agencies and entities throughout the reporting period. Outcomes of state improvements initiatives must result in policy, practice or procedure improvements beyond those associated with or already reported in previous state-level and state leadership coordination and collaboration sections.

Section 4f requirements: “the outcomes of any improvement initiatives carried out by the State as a result of activities funded under this section, including a description of any written policies, practices, and procedures that the State has developed and implemented regarding access to, provision of, and funding for, assistive technology devices, and assistive technology services, in the contexts of education, health care, employment, community living, and information technology and telecommunications, including e-government.”

Overview of Activities Performed

Coordination/Collaboration and Partnerships are essential in responding to increased demand to acquire AT, conduct educational/training activities, demonstrations, and short-term loans. Reporting partnership activities enables other programs to identify partnership activities that can be replicated to increase access to and acquisition of AT. Partnerships can help reach a broader universe of people with disabilities across all geographies and points of access in a state. This is particularly important in larger states and states with rural geographies where people with disabilities are not likely to have easy access to the physical location of an AT program.

Coordination/Collaboration partnership initiative reporting is required. State AT programs should have a multitude of partnerships. The AT Act requires goals in a variety of areas and the 2022 reauthorization added the area of “access to tele assistive technology to aid in the access of health care services, including mental health and substance use disorder services.” A partnership in that area could be reported in this section using the focus area of *Information and Communication Technology/Remote Connectivity*.

Please report at least one and up to two partnerships that increase access to AT for this reporting period. Examples of partnership initiatives include collaborating with the state aging network to provide Assistive Technology toolkits for each Area Agency on Aging or teaming up with the state education agency to distribute AT needed for remote learning or partnering with Centers for Independent Living to increase awareness and access to assistive technology for people with disabilities.

State improvement outcome reporting is optional, but ACL strongly emphasizes the importance of partnerships to expand the AT programs’ reach to unserved target populations and reporting this information will improve the ability to replicate successful partnerships in other states and improve overall program outcomes. You may report up to two MAJOR state improvement

outcomes for this reporting period. (For example, you may have worked with your state Information Technology Office to implement an Executive Order related to web accessibility or may have worked with your Medicaid office to streamline procedures for obtaining wheeled mobility devices.)

A. Coordination/Collaboration *Partnership* Initiatives

Complete this section for each coordination/collaboration partnership initiative to be reported.

1. As concisely as possible, describe the partnership initiative. What activities/services were provided? Who are the major collaborating organizations and what is their role? Who is served/benefited? What funding was used to implement the initiative? (*Narrative field*)
2. As concisely as possible, describe the measurable results of the initiative and any lessons learned. How did access to AT change because of the coordination/collaboration/partnership? How did awareness of AT change because of the partnership? How did the reach of the state AT program change because of the partnership? What made the partnership successful? What would you change or wish you had done differently? Provided funding/resources are available, will the initiative continue or is this a one-time event? What advice would you give for replication of the initiative? Please include URL for initiative if available. (*Narrative field*)
3. What focus areas(s) were addressed by the initiative? *Drop-down list: Education, Employment, Housing/Home Automation, Transportation, Community Participation and Integration, Recreation/Leisure, Health, Aging, Transition (school to work or congregate care to community), Aging and Disability Network/No Wrong Door, Veterans, Information and Communication Technology/Remote Connectivity, Other.*
4. What AT Act authorized activity(s) were addressed? *Drop-down list: SFA, Reuse, Device Loan, Demo, Educational/Training Activities, TA, I&A, PA.*

B. State Improvement Outcomes

Complete this section for each MAJOR state improvement outcome to be reported.

1. In one or two sentences, describe the outcome. Be as specific as possible about exactly what changed during this reporting period because of the AT program's initiative. (*Narrative field*)
2. In one or two sentences, describe the written policies, practices, and procedures that have been developed and implemented because of the AT program's initiative. Include information about how to obtain the full documents, such as a Web site address or e-mail address of a contact person, but do not include the full documents here. (If there are no written policies, practices, and procedures, explain why.) (*Narrative field*)
3. What was the primary area of impact for this state improvement outcome? *Drop-down box: Education – Employment -- Health, Allied Health, Rehabilitation -- Community Living -- Technology (Information Technology, Telecommunications, and AT).*

B State Improvement Outcome

If you have a second MAJOR outcome to report, this section will need to be completed with items 1 through 3 above.

Additional and Leveraged Funds

Outline

Overview of Activities Performed

A. Leveraged Funding for State Plan Activities (Previously Reported)

B. Leveraged Funding for Activities Not in State Plan (not previously reported)

C. Notes

Section 4f requirement: “(x) the source of leveraged funding or other contributed resources, including resources provided through subcontracts or other collaborative resource-sharing agreements, from and with public and private entities to carry out State activities described in subsection (e)(3)(B)(iii), the number of individuals served with the contributed resources for which information is not reported under clauses (i) through (ix) or clause (xi) or (xii), and other outcomes accomplished as a result of such activities carried out with the contributed resources”

Overview of Activities Performed

Did you have Additional and Leveraged Funding to report? *(Check yes or leave unchecked).*

In this section, provide information on funding that has been leveraged to support statewide AT Program activities as included in your State Plan for AT. Report only actual dollars leveraged. Do NOT report in-kind contributions. Do NOT report ongoing AFP endowments or matching funds. Additional and leveraged funding reported in this section is NOT necessarily considered program income under federal guidelines.

A. Leveraged Funding for State Plan Activities

Statewide AT Programs often establish partnerships and leverage funds to support state implementation of required AT Act activities as described in your State Plan. These funds should be reported by entering the sources and amounts of non-AT Act funds that you received during this reporting period to support your State Plan activities. The definitions of each category are as follows:

Federal – Grants that are received directly by the State AT Program from federal agencies, e.g., HHS/ACL, ED/OSEP, etc.

Public/State Agency – Grants, contracts, memorandum of understanding and similar agreements between the State AT Program and state or other public agencies with associated dollars, e.g., federal flow through, dedicated state funds, etc.

State Appropriations – State dollars/general state funds directly appropriated for use by the State AT Program;

Private – Grants, contracts, memorandum of understanding and similar agreements with private agencies funded with dollars that can be of any type.

Identify which state level or leadership activity the funds were allocated to support. If funds were received to support more than one activity, report an amount for each activity according to funding allocations.

Identify if data associated with this leveraged funding has been reported or not. For most leveraged funding entries, the number of individuals served, or other outcome data should have already been reported in the appropriate previous sections of this Annual Performance Report.

However, there may be rare extenuating circumstances in which a program reports leveraged funding in this section but is unable to report data in the associated section of the APR, e.g., a AT educational/training event funded by an external source did not allow for information to be collected in a way that could be reported in the educational/training activities section of the APR. In that case, you should indicate that data was not reported and provide a narrative explanation.

Fund Source (select one)	Amount	Use of Funds (select one)	Data Reported (select one)
<ul style="list-style-type: none"> ▪ Federal ▪ Public/State Agency ▪ State Appropriations ▪ Private 		<ul style="list-style-type: none"> ▪ State Financing ▪ Educational/Training ▪ Reuse ▪ Technical Assistance ▪ Demonstration ▪ Public Awareness/I&A ▪ Device Loan 	<ul style="list-style-type: none"> ▪ Yes, data was reported in previous section of APR ▪ No, data was not reported in previous section of APR and an explanation is provided
option to repeat row data			

For any leveraged funding reported above for which data could not be reported, please describe the extenuating circumstances that precluded data from being reported and efforts to remediate the situation in future reporting periods.

(Narrative item)

B. Notes

Describe any unique issues with your data in this section including any leveraged funding your program received that was used to support activities authorized by the AT Act, but those activities were not included in your State Plan for AT with an explanation of why such activities were not part of the State Plan.

(Narrative item)

Data Collection Instrument Access Performance Measure

TO BE COMPLETED BY PROGRAM STAFF

ID (optional) _____

- Services provided:
 - Device demonstration**
 - OR**
 - Device loan (decision-making purpose)**
- Date service delivery was completed: _____
- Date this form was received: _____

Please answer the following questions about the services you received from the (*insert name of statewide AT program or its subcontractor*). We need this information to provide high quality services and to meet the requirements for receiving federal funding.

1. The primary purpose for which I need (or the person I represent needs) an AT device or service is related to:

(Please mark only one answer.)

- Education**—participating in any type of educational program
- Community living**—carrying out daily activities, participating in community activities, using community services, or living independently
- Employment**—finding or keeping a job; getting a better job; or participating in an employment training program, vocational rehabilitation program, or other program related to employment

2. What kind of decision about AT devices or services were you (or someone you represent) able to make after your device demonstration or device loan?

(Please mark only one answer.)

- _____ Decided that AT device(s) or service(s) will meet my needs (or the needs of someone I represent).
- _____ Decided that AT device(s) or service(s) will not meet my needs (or the needs of someone I represent).
- _____ Have not decided.

Data Collection Instrument Acquisition Performance Measure (SFA and Reuse)

TO BE COMPLETED BY PROGRAM STAFF ID (optional) _____

Services provided:

“State financing” services—including financial loan, assistance in accessing funds for AT devices/services, assistance in obtaining AT devices and services at reduced cost or free, or other related services

Device reuse— received an AT device through a device exchange, reassignment/refurbish or repair or open-ended loan program

Date service delivery was completed: _____

Date this form was received: _____

Please answer the following questions about the services you received from (*insert name of statewide AT program or its subcontractor*). We need this information to provide high-quality services and to meet the requirements for receiving federal funding.

1. The primary purpose for which I need (or the person I represent needs) an AT device or service is related to:

(Please mark only one answer.)

- Education**—participating in any type of educational program
- Community living**—carrying out daily activities, participating in community activities, using community services, or living independently
- Employment**—finding or keeping a job; getting a better job; participating in an employment training program, vocational rehabilitation program, or other program related to employment

2. Why did you choose to obtain AT devices/services from our program?

(Please mark only one answer.)

- _____ I could only afford the AT through this program. (I could not afford it through other programs.)
- _____ The AT was only available to me through this program. (I am not eligible or don't qualify for other programs, the AT is not covered by other funding sources or the specific device I needed is not provided by other programs.)
- _____ The AT was available to me through other programs, but the system was too complex, or the wait time was too long.
- _____ None of the above

Data Collection Instrument Acquisition Performance Measure (Device Loan)

TO BE COMPLETED BY PROGRAM STAFF

ID (optional) _____

Short-term device loan purposes:

- Providing loaner equipment during device repair or while waiting for funding**
- Providing an accommodation for a time-limited event**
- Conducting educational/training or other professional development activity**

Date service delivery was completed: _____

Date this form was received: _____

Please answer the following questions about the services you received from (*insert name of statewide AT program or its subcontractor*). We need this information to provide high-quality services and to meet the requirements for receiving federal funding.

1. The primary purpose for which I need (or the person I represent needs) an AT device or service is related to:

(Please mark only one answer.)

- Education**—participating in any type of educational program
- Community living**—carrying out daily activities, participating in community activities, using community services, or living independently
- Employment**—finding or keeping a job; getting a better job; participating in an employment training program, vocational rehabilitation program, or other program related to employment

2. Why did you choose to borrow AT devices/services from our program?

(Please mark only one answer.)

- _____ I could only afford to borrow the AT through this program. (I could not afford to rent or borrow it through other programs.)
- _____ The AT was only available to me through this program. (I am not eligible or there is no other rental or device loan program available; or the specific device(s) I needed are not loaned by other programs.)
- _____ The AT was available to borrow from other programs, but the system was too complex or the wait time was too long. (I couldn't borrow device(s) in a timely manner.)
- _____ None of the above

Data Collection Instrument Information and Communication Technology Accessibility Performance Measure

TO BE COMPLETED BY PROGRAM STAFF

ID (optional) _____

- IT/Telecom Educational/Training Session
- Date session was provided: _____
- Date this form was received: _____

Please answer the following question about the training you participated in provided by (*insert name of statewide AT program or its subcontractor*). We need this information to provide high-quality services and to meet the requirements for receiving federal funding.

What do you anticipate will be the primary outcome of your participation in this educational/training event on Information and Communication Technology (ICT) accessibility?

(Please mark only one answer that best represents the primary outcome.)

- _____ ICT (web, software, etc.) procurement or development policies, procedures, or practices will be improved or better implemented to ensure accessibility
- _____ Educational/Training activities will be developed/implemented to ensure accessibility of websites, software, or other ICT (web, software, etc.)
- _____ Outcome is unknown currently.

Survey Instrument Customer Satisfaction

TO BE COMPLETED BY AT PROGRAM STAFF

ID (optional) _____

Services provided:

- Device demonstration**
- Device short-term loan**
- State financing programs —including financial loan, direct provisions of AT or acquisition of AT for a reduced cost.**
- Device reuse programs —including device exchange, or refurbish/repair with reassignment or open-ended loan**

Date service delivery was completed: _____

Date this form was received: _____

1. Which of the following best reflects your level of satisfaction with the services you received?

(Check one.)

- _____ Highly satisfied
- _____ Satisfied
- _____ Satisfied somewhat
- _____ Not at all satisfied