

EFG Process 8/2019

1. S and D comes in – Associate enters it in ATTIE as a Funding Coordination Request, sets the status to “Open”, and to-do’s the Resource Specialist (see policy on Service and Device application) .
 - a. If this is an S and D from a consumer that has an open service request (PreEts, Vr, DHHS), please note that on the S and D. This will be case noted so that the Resource Specialist knows that the S and D is for an open service request.
2. Resource Specialist will review the S and D and enter the information on the EFG spreadsheet.
3. If there is an open Service Request and the S and D is intended for that Request the Resource Specialist will attach the S and D to the Request, and to-do the staff assigned and let them know the amount set aside/waitlist status and what the next step will be (i.e. sent in for review and authorization, need for resource coordination, waitlist, funding set aside, etc.).
 - a. If ready for funding and EFG funds are available, the Resource Specialist will to-do the DHHS Program Supervisor and inform them of the amount of EFG funds set aside. Funding Coordination Request will be closed as “Complete”.
 - b. If the Request is not ready for funding and EFG funds are available, the Resource Specialist will set aside the appropriate funds and case note the amount. The Technology Specialist will send the project in for authorization to the appropriate Program Supervisor once it is ready. Funding Coordination Request will be closed as “Complete”.
 - c. If there are no EFG funds available the Resource Specialist will work with the staff assigned to the Request to see if the consumer would like assistance locating additional funding and if they would like to be on the EFG Waitlist.
 - i. If the consumer does not want assistance locating additional funding and does not want to be on the EFG Waitlist the Funding Coordination Request will be closed as “Complete”.
 - ii. If the consumer does want assistance locating additional funding and would like to be put on the EFG Waitlist:
 1. Resource Specialist will send out a resource letter explaining the waitlist and other funding options.
 2. Resource Specialist will close out the Funding Coordination Request as complete after 90 days.
 3. Once the consumer’s name comes to the top of the waitlist, the Resource Specialist will contact the consumer to verify the service is still needed and a new Service Request will be opened (unless the original one is still open). If consumer declines the EFG program, a case note will be entered in the closed Funding Coordination Service Request.
4. If there is not an open service request, the Resource Specialist will look to see what funds are available and what the status of the waitlist is.
 - a. If there is a waitlist:
 - i. Resource Specialist will send out a resource letter explaining the waitlist and other funding options
 - ii. Resource Specialist will close out the Funding Coordination Request as complete after 90 days.
 - iii. Once the consumer’s name comes to the top of the waitlist, the Resource Specialist will contact the consumer to verify the service is still needed and a new Service Request will be opened. If consumer declines the EFG program, a case note will be entered in the closed Funding Coordination Service Request.
 - b. If there is not a waitlist:
 - i. Resource Specialist will close out the Funding Coordination Request as “Complete” and open up a new service request.

5. The new service request will be opened by the Resource Specialist and put in “Waiting” status and to-do’d to the DHHS Program Supervisor so that they can assign the Request to the appropriate Tech. Spec. The Resource Specialist will enter a case note stating the amount of EFG funds set aside.
6. DHHS Program Supervisor will change the status to “Open”, assign the Request and will inform the Resource Specialist of the Tech. Spec assigned. EFG spreadsheet will be updated.
7. Technology Specialist will go through the normal assessment, permissions, bids process.
 - a. If the winning bid is over the set aside EFG amount, a to-do will be sent to the Resource Specialist letting them know the overage.
 - i. The Resource Specialist will then send out a letter to the consumer explaining the funding shortage, what some options for funding are, and giving them a deadline to respond to the letter (30 days).
 1. If no response from the consumer by the deadline, the Request will be closed and the set aside funds will be made available to another consumer.
 2. If the consumer responds, the Resource Specialist will work with them to put together the funding package.
 3. Once funding is put together, the Request will be sent to the DHHS Program Supervisor for review and authorization.
 - a. Once authorized the Resource Specialist and the Tech. Spec will be sent a to-do stating that the project is authorized. The EFG spreadsheet will be updated.
 - b. If the bid is under the set aside amount, the project will be submitted to the DHHS Program Supervisor for review and authorization.
 - i. Once authorized the Resource Specialist and the Tech. Spec will be sent a to-do stating that the project is authorized. The EFG spreadsheet will be updated.
 8. When the invoice arrives the Accounting Associate will to-do the Tech. Spec that the project is ready for inspection. The Accounting Associate will let the Resource Specialist know if the invoiced amount is different than the authorized amount. If so, the EFG spreadsheet will be updated.
 9. Technology Specialist will inspect the project and have the consumer sign the AA and fill out the EF Survey and attach both in ATTIE. They will then to-do the Resource Specialist and let them know the EF survey is attached, and to-do the Accounting Associate to let them know the AA is attached. The information from the EF survey will be entered into the EFG spreadsheet by the Resource Specialist.
 10. When the project has been paid, the Accounting Associate will to-do the Resource Specialist to let them know the project has been paid. The EFG spreadsheet will be updated.