ATP Funding Coordination Process – draft 4/11/19

1. Service and Device application arrives in Lincoln.
    A. Original document will be placed in consumer file.
        i. For new consumers, a new file will be created.
    B. Document is received electronically
        i. If sent in by ATP staff, the original document will be stored in the outer office in a file made for the consumer.
            a. Once Service Request is complete all scannable documents will be attached in ATTIE, and original documents with signatures will be transferred to the Lincoln ATP office. (see policy on transferring files).
        ii. If sent in by non-ATP staff, the individual that sent the application will be contacted by the Front Desk Associate and informed that ATP needs an original copy mailed in.

2. Front Desk Associate will review the Service and Device application to ensure it is complete.
    A. If information is missing (i.e. financial, Social Security #, disability, etc.) consumer will be contacted by the Front Desk Associate and missing information will be obtained and added.
        i. A case note will be entered stating that the consumer was contacted and will list out the info that was added to the application.
        ii. If Service and Device application is not signed, consumer will be contacted and the application will be mailed back to them for signature.
            a. All Service and Device applications that need to be sent back to the consumer will be date stamped. No record will be created in ATTIE until application is signed.
    B. If information is complete, the Front Desk Associate will check to see if consumer has an existing record in ATTIE.
        i. If there is an existing record:
            a. A new Service Request will be entered with "Funding Coordination" as the service.
            b. The Service and Device application will be attached electronically to the Funding Coordination Service Request.
            c. A ToDo stating Service and Device application received will be entered and assigned to the Resource Specialist.
                1. If Service and Device application is for an EFG project, an Urgent ToDo will be sent to Resource Specialist noting that it is an EFG case.
            d. Service Request status will be set to "Open".
            e. Technology will be set to what is requested on the application.
            f. Service Request will be assigned to the Resource Specialist.
            g. The consumer file will be retrieved from the File Room, the Service and Device application will be placed in the file, and the file will be given to the Resource Specialist.
        ii. If there is not an existing record,
            a. Consumer demographic information will be entered.
            b. Steps 2.B.i.(a.-f.) will be followed.
            c. A new file will be created, Service and Device Application will be placed in it, and the file will be given to the Resource Specialist.

3. Resource Specialist will check to see if other Service Requests are open in the record.
    A. If another Service Request is open:
        i. Resource Specialist will check the open Service Request to see if the received Service and Device application is part of an ongoing project.
            a. If yes, Resource Coordinator will:
                1. Check for additional resources.
                2. Attach Service and Device Application to the existing Service Request in ATTIE.
                3. Send a ToDo to the appropriate staff informing them of the receival of the Service and Device application and other resources found.
                4. Change status of Funding Coordination Service Request to "Complete".
                5. Return consumer file to File Room.
            b. If no, Resource Specialist will follow procedure 3.B(i).
    B. If no other Service Request is open Resource Specialist will:
        i. Check to see if Consumer may qualify for a program ATP oversees.
            a. If yes, a ToDo will be sent to the appropriate Program Coordinator.
                1. If eligible the Program Coordinator will either open up a new Service Request or place the consumer on a waitlist.
                    a. Program Coordinator will send a ToDo to the Resource Specialist informing them of the consumer's eligibility and waitlist status.
                    b. Resource Specialist will:
                        i. Research possible funding sources for the consumer.
                        ii. Put together and mail out a Resource Letter explaining the resources and noting waitlist status (if applicable).
                        iii. Case note that a letter was sent
                        iv. Return consumer file to File Room.
                    c. After 90 days the Resource Specialist will change the status of the Funding Coordination Service Request to "Complete" and add a case note stating Request is being closed.
                2. If ineligible, Program Coordinator will send a ToDo to the Resource Specialist informing them of the ineligibility.
                    a. Resource Specialist will:
                        i. Research possible funding sources for the consumer.
                        ii. Put together and mail out a Resource Letter explaining the resources.
                        iii. Case note that a letter was sent
                        iv. Return consumer file to File Room.
                    b. After 90 days the Resource Specialist will change the status of the Funding Coordination Service Request to "Complete" and add a case note stating Request is being closed.