**Process: OPI Adaptive Equipment Funds Requests**

When ADVSD indicates that funds are available\*:

\*Before making a request, please ask your client to check with their healthcare provider to see if the equipment is covered by their health plan.

[commonly covered DME by Medicare](https://www.medicare.gov/coverage/durable-medical-equipment-dme-coverage)

**Procedure for requesting adaptive equipment, and steps for complete follow-through:**

1. Complete and submit to your Contract Liaison as email attachments:

* Current ADVS **adaptive equipment request - WORD format**; multiple items from one vendor may go on one request form, but you must use a separate request form for each vendor you wish to order from. Do **not** convert the WORD doc to a PDF! Your Contract Liaison needs to be able to copy and paste from the Word document.
* **Vendor quote** for the adaptive equipment item(s)
* **Verbal disclosure form** that client authorizes over the phone
* **W9 for the vendor** if they are not currently a vendor with the County.
* Client for whom you are requesting items must be an OPI client!

Please use a **separate email for each client;** do not put multiple requests for multiple clients in a stack, scan them, and attach them to one email. Those make requests nearly impossible to track!

In the **email subject line**: OPI adaptive equipment request and client initials. Do NOT use the client’s name.)

**Example:** Adaptive Equipment Request, J.D.

2. Contract Liaisonreviews your request, asks you for any needed clarification, informs you of approval or denial of your request, and, if approved, submits the request form and other documentation to ADVS business services team.

3. Business services team orders the item(s).

4. Case manager follows up with client to confirm item(s) has been ordered and asks client to call CM when item(s) arrives.

5. Case manager closely monitors delivery of the item(s) and asks if consumer is satisfied with the item(s). Case manager completes the **verbal confirmation of goods received form** (simple phone call to consumer) and submits the completed form to their contract liaison. **OR**

6. If client is not satisfied with the item and wants to return it or exchange it, CM contacts the Contract Liaison for instructions. A member of the ADVSD team will guide the CM through the return or exchange process.

7. Keep in mind that most vendors are not paid until the client has received the item.

**Availability of Funds -** OPI Adaptive Equipment funds are made available each fiscal year. The goal is that case managers will thoughtfully request adaptive equipment as client needs emerge. The amount of available funding varies from year to year.

**Vendors**

Multnomah County’s sustainability practice includes supporting local, small businesses whenever possible. Our current list of local vendors for adaptive equipment includes: Shamrock Medical and Mattress Lot. We plan to add more local vendors and welcome your ideas. Amazon is an option only if the item cannot be purchased from a local vendor.

You may use any local vendor who wants to participate; if the vendor is not on the County’s current list, please have the vendor complete a W9 form (available from your Contract Liaison) and submit it to your Contract Liaison with your request and other required documentation listed below. Vendor must understand that they are not paid until the client has received their item(s). This can be a barrier to vendor willingness to provide adaptive equipment.

**Best Practices for identifying the need for adaptive equipment**:

* Train yourself to consider how adaptive equipment might enhance the independence and quality of life for each OPI consumer you support.
* As you speak to clients during the year, by phone or during home visits, listen carefully for any barriers the consumer is facing and consider how adaptive equipment might address these barriers. Include a conversation about possible adaptive equipment needs a couple of times a year.
* Before making a request, please ask your client to check with their healthcare provider to see if the equipment is covered by their health plan. You may need to assist client in making calls or appointments.