TITLE: Policies and Procedures for the Use of Low Incidence (LI) Funds

NUMBER: BUL-3666.1

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PURPOSE: The purpose of this Bulletin is to inform all District staff working with students with disabilities of the required policies and procedures that must be followed for the use of low incidence (LI) funding.

MAJOR CHANGES:

- Updates written policies and procedures for the use of LI funding.
- The procedures have been updated to include the appropriate IEP pages to be submitted when considering the use of LI funding;
- Attachments outlining the procedures for each of the low incidence disabilities have been updated to include current practices; and
- Contact information has been updated to include current information.

BACKGROUND: Low Incidence Disabilities

Low incidence disabilities (hearing disorders, visual impairment and severe orthopedic impairment) are defined by federal law in the Code of Federal Regulations (CFR) as:

I. Hearing Disorders
   A. Deafness – a hearing impairment so severe that the child is impaired in processing linguistic information through hearing, with or without amplification that adversely affects a child's educational performance [CFR 300.7(a)(3)].
   B. Hearing impairment – impairment in hearing, whether permanent or fluctuating, that adversely affects a child’s educational performance but that is not included under the definition of deafness [CFR 300.7(a)(5)].

II. Visual impairment, including blindness, means impairment in vision that, even with correction, adversely affects a child's educational performance. The term includes both partial sight and blindness [CFR 300.7(a)(13)].

III. Orthopedic impairment means a severe orthopedic impairment that adversely affects a child's educational performance. The term includes impairments caused by congenital anomaly (e.g., clubfoot, absence of some member, etc.), impairments caused by disease (e.g., poliomyelitis, bone tuberculosis, etc.), and impairments from other causes (e.g., cerebral palsy, amputations, and fractures or burns that cause contractures) [CFR 300.7(a)(8)].
BACKGROUND: Purpose of Low Incidence (LI) Funds

LI funds are state funds used to provide specialized books, materials, and equipment as required by a student with an LI disability.

Some students classified as having an orthopedic impairment may not be eligible to receive low incidence funding unless they have a “severe orthopedic impairment.” Students with severe orthopedic impairments require highly specialized services, materials and equipment. Generally, a student with a severe orthopedic impairment would have a medical diagnosis including significant gross motor or range of motion deficiencies.

Allocation and Appropriate Use of Low Incidence Funds

Allocation of low incidence (LI) funding to school districts is determined by the total number of students with low incidence eligibilities as reported in the California Special Education Management Information System (CASEMIS).

The use of these funds is limited to expenditures on books, materials, and equipment, for students with low incidence disabilities. The purchase must relate to the unique educational needs resulting from the low incidence disability as indicated in the individualized education program (IEP) of eligible students. For example, regular textbooks and workbooks would not qualify as opposed to low vision aids, digital media, large print or Braille books for students who have visual impairments. Bolsters and mats for young children should be a part of basic equipment and would not qualify, while specialized adapted feeding and self-care equipment needed by children because of their severe orthopedic impairments, would qualify.

Low incidence funds may be used for all students with low incidence disabilities (ages 0-21) as defined in law. For example, a student who has a hearing disorder and also has developmental delays would still be eligible to receive services funded by low incidence funds even if the student was reported as having developmental delays or multiple disabilities.

It is important that providers with the appropriate credential or license to serve students with specific low incidence disabilities be involved in the team assessment process and attend the IEP meetings so that books, material and equipment considered for purchase for low incidence students are related directly to the unique educational needs of the student resulting from a low incidence disability.

Inappropriate Use of Low Incidence Funds - Examples:

- Supporting staff development. It is suggested that technical support and training be included when equipment is purchased. Special Education Local Plan Areas (SELPAs) are encouraged to collaboratively develop regionalized multi-agency funded centers that can provide ongoing technical support, training and address other activities and assure funds are used in the most cost effective manner.
BACKGROUND:  
• Purchasing medical therapy units for California Children’s Services. Local education agencies must provide necessary space and equipment for the provision of occupational therapy and physical therapy in the most efficient and effective manner.

• Purchasing medical equipment needed for providing specialized health needs since California Code of Regulations (CCR), Title 5, Section 3051.12(b)(3)(C), states that “the school district shall not be required to purchase medical equipment for an individual student.” (Universal Precautions)

• Constructing or altering facilities (e.g., building ramps), or acquiring storage units.

• Supplanting books, equipment and materials that have been provided by other agencies. Low incidence funds are to be used only to supplement, and not to supplant other available funding for books, materials and equipment provided through the base program for general education and/or students with disabilities. For example, basic computers or other basic technology should not be purchased with low incidence funds unless it can be clearly demonstrated to fulfill a specialized function, format or adaptation directly related to the low incidence disability. General education or other special education funding must be used for purchasing such basic items.

PROCEDURES:  
All of the following procedures must be followed in order to secure LI funding:

A. IDENTIFICATION OF STUDENTS REQUIRING LOW INCIDENCE FUNDS

1. IEP TEAM DETERMINATION OF LI DISABILITY ELIGIBILITY: A determination by the IEP team, including the school nurse or audiologist, that the student has a severe disabling condition in one or more of the following areas: hearing, vision and/or orthopedic impairments. Persons knowledgeable of these disabilities are the related services providers and/or appropriately certificated teachers who work in the disciplines of hearing, vision, and severe orthopedic disabilities. The following are to be considered persons knowledgeable of the disability in specialized circumstances:

• Teachers With M.O.V.E. Certification At The Secondary Level: These teachers may act as assessors for motor equipment with consultation from the physical therapist. For students participating in the M.O.V.E. program, in addition to the IEP, there must be a written approval from the student’s physician and parent permitting participation before LI funding is authorized.

• Speech-Language Pathologist: If the orthopedic disability affects the oral musculature with the result that the child is nonverbal, the speech-language pathologist is the assessor.
PROCEDURES:

- **Classroom Teacher With The Related Services Provider:** If a student is on a special education site and eligible with disabilities in the areas of vision, hearing, and/or severe orthopedic disability, and does not receive active services from related services, the classroom teacher in consultation with the appropriate related services school-site provider may recommend specialized equipment.

2. **ASSESSMENT:** Once the student is identified as having a low incidence eligibility, the provision of LI funded equipment is based on an assessment by personnel knowledgeable of the three disabilities which qualify for low incidence funds (hearing, vision, severe orthopedic disability, or a combination thereof). An assessment of the need for the material and equipment conducted by a team of the appropriately credentialed/licensed personnel consisting of the classroom teacher, special education teacher(s), and, if necessary, the appropriate related services provider(s) for hearing, vision, occupational therapy, physical therapy, assistive technology or speech. Assessments (or consultation reports, when appropriate) are presented in a written format to school IEP teams and incorporated into the IEP. The assessed need for equipment and/or materials should be included in the Present Level of Performance section of the IEP.

Related services personnel and/or the appropriately certificated teachers assigned to school sites in these disciplines conduct assessments for new equipment for LI eligible students. Related services personnel generate consultation reports when previous assessments have recommended equipment and current circumstances require an upgrade or a size change in equipment.

When a student transitions from one placement to another (e.g., special education to general education or elementary school to middle school), assessment of the student’s equipment needs in the new setting (see “Transportation” section) should take place prior to the transition IEP meeting. Assessors to be consulted during this process include, but are not limited to, related service providers, including assistive technology.

3. **SUBMISSION OF WRITTEN ASSESSMENT REPORT TO IEP TEAM.**

4. **DOCUMENTATION OF THE DETERMINATION BY THE IEP TEAM THAT SPECIALIZED MATERIAL AND EQUIPMENT ARE NEEDED.**

   Documentation of materials and equipment used for academics require a goal that includes the item (e.g., large print text, gait trainer, communication device). If the equipment is an adaptation to access the educational environment (e.g., sound field equipment, hoyer lifts, treatment tables), the documentation of its use would be in the Modifications and Accommodations section of FAPE page.

5. **AUTORIZATION OF LI FUNDING:** LI funding is authorized only after the IEP team including the parent have approved the recommendations of the related services and/or other appropriately certificated personnel.
PROCEDURES: B. ORDERING PROCESS FOR LI FUNDED EQUIPMENT AND/OR MATERIALS

After checking existing inventory, new expenditures of low incidence funds are requested and authorized using the “Request for Low Incidence Equipment and/or Material” form (see Attachment D) and the “Request for New Low Incidence Expenditure” form (see Attachment E). District personnel recommending equipment should complete the form and submit it to the appropriate administrator, as listed below, for review within 48 hours of receiving the signed IEP in accordance with the California Department of Education directive to LAUSD. Following administrator approval, the order will be placed. Each of the Low Incidence Eligibilities has a specific process for ordering of equipment Please refer to the following:

- Review “Ordering Procedures for Deaf and Hard of Hearing Programs” (Attachment A) for the instructions for ordering equipment that related to Hearing Impairments and Deafness.
- Review “Ordering Procedures for Visual Impairment Program” (Attachment B) for the instructions for ordering equipment that relates to Visual Impairments and Blindness.
- Review “Ordering Procedures for Severe Orthopedic Impairment Program” (Attachment C) for instructions for ordering equipment that relates to Severe Orthopedic Impairment.

If more than one student requires a specific piece of equipment, and it is appropriate to share that equipment (e.g., hoyer lift), it can be obtained with LI funds by completing Attachments D and E, and including IEP documentation for each student (Attachment D.)

C. EQUIPMENT NEEDING REPLACEMENT PARTS

When replacement or supplemental parts are needed for a piece of low incidence equipment that has already been approved for a student, reference the name and birth date of that student, plus the date of the IEP where the equipment was originally authorized and submit with the order using Attachment E for the replacement parts.

D. SENDING LOW INCIDENCE EQUIPMENT FOR USE AT HOME

When IEP teams are in agreement that low incidence equipment is needed for home use, it must be documented on the IEP in FAPE page 2 Additional Discussion, and appropriate personnel, including the parent must sign a “Responsibility Contract” (see Attachment F) before the equipment will be released to the student. All equipment approved for home use must be returned to a District site during non-instructional time for inventory, maintenance and repair, unless prior approval is obtained from both the site and program administrators to retain it. All low incidence equipment assigned for student use must be returned to the District upon the student’s graduation, or receipt of a certificate of completion.
PROCEDURES:  

E. EQUIPMENT FOR STUDENTS WHO HAVE LEFT THE DISTRICT

When students transfer out of LAUSD to a different school district or an independent charter but remain in the state of California, specialized equipment that has been purchased for that student’s exclusive use through LI funds must follow the student to the new school. It is the new district’s/charter’s responsibility to transport and maintain the equipment. If the equipment is shared by more than one student, the equipment does not go with the student to the new district/charter. It is the new district’s/charter’s responsibility to order appropriate equipment for the student.

F. TRANSPORTATION OF EQUIPMENT

When students with disabilities change school sites within LAUSD, specialized equipment that has been purchased through LI funds must follow the student to the new school. Similarly, when equipment is available within the District’s inventory to meet newly identified student needs, the receiving school is responsible for making arrangements to transport that equipment from one location to another. In some cases this equipment is light weight (i.e., slant boards, lap top computers, or augmentative communication devices) and easy for the related service provider to move it to the new school site. The provider will alert the sending and receiving schools and take the responsibility of moving the equipment themselves.

When the equipment is large and heavy (i.e., desk top computers, standers, Hoyer lifts, Rifton chairs), professional assistance may be required to move it to the new school site. It is the responsibility of the receiving school’s administrator to arrange for pick up and delivery of such equipment and the receiving school will incur any costs involved. The school may have their own means to pick up the equipment, or they may contact their complex project manager (CPM) for assistance. The related service provider may work in consultation with the schools in making the necessary scheduling arrangements for a smooth move.

G. Records Maintenance of Low Incidence Funds Expenditures

Schools and programs should maintain the following records of low incidence fund expenditure:

- Copies of “Request for Low Incidence Equipment and/or Material” forms and the “Request for New Low Incidence Expenditure” forms (Attachments D and E) with supporting documentation, including appropriate IEP pages (cover page with identifying information, LI assessment and equipment recommendations and parent signature page.)

- Copies of Purchase Orders and packing slips

- Purchase Orders which have drawn from LI funds for the past 7 years
PROCEDURES:  H. EQUIPMENT INVENTORY

LI program administrators/designees are responsible to maintain and annually verify the accuracy of the inventory and to make changes to the inventory list if equipment assignments have changed, if equipment has been salvaged, etc. In addition, each school site is to maintain the equipment on their master inventory list. Outgoing Equipment Transfer Form (see Attachment I) is to be completed and maintained at the school site for any equipment leaving the site. To ensure that equipment is accurately recorded within the LI Inventory and on the school site inventory, the outgoing form.

- **New Equipment:** New orders for general education sites will be entered directly into a central inventory database. Special education sites are to maintain their own inventory of low incidence equipment and to enter new low incidence equipment on their inventory as it arrives.

- **Existing Equipment:** To notify school sites and the LI Equipment Inventory of the change of location of a piece of equipment, the Incoming Equipment Transfer Form (see Attachment J) should be completed. The school should retain a copy of the form, and the equipment should be added to the school site inventory. A copy of the form should be sent to Related Services for entry into the LI Inventory.

- **Old Equipment:** There is a need (in accordance with the CA Education Code) for all LI funded equipment to be maintained in an inventory. Schools and programs were required to document acquisitions of LI equipment prior to the creation of the central LI inventory database in 2002-03. This central LI database helps reduce the number of unnecessary expenditures and provide available equipment in a timelier manner for LI eligible students across the District. Please contact the appropriate related service provider to ensure that every effort is being made to document and identify equipment that is obsolete and to send it to salvage.

I. EQUIPMENT REPAIR

Equipment that is broken should be surveyed by the appropriate related service provider for repair potential and processing. For Frances Blend School this process is handled through the VI specialized equipment coordinator. For Marlton School this process is handled through the DHH Program.

When repairs are required the appropriate provider should complete Attachment D and E, and include all necessary documentation. Authorization must be obtained prior to the repairs before repairs can begin.
ATTACHMENTS: For specific information regarding the ordering of low incidence equipment for each program, refer to instructions for ordering low incidence equipment that are outlined on these Attachments:

- Attachment A: Ordering Procedures for Deaf and Hard of Hearing/Audiology Programs
- Attachment B: Ordering Procedures for Visually Impaired Program
- Attachment C: Ordering Procedures for Orthopedic Impaired Program
- Attachment D: Request for Low Incidence Equipment
- Attachment E: Request for New Low Incidence Expenditure
- Attachment F: Responsibility Contract
- Attachment G: Equipment Loan Service (OI)
- Attachment H: Frequently Asked Questions for Low Incidence
- Attachment I: Outgoing Equipment Transfer Form
- Attachment J: Incoming Equipment Transfer Form
- Attachment K: Orthopedic Impairment Low Incidence Funds: Questions and Answers

AUTHORITY: This is a policy of the Superintendent of Schools.

RELATED RESOURCES:
- California Education Code
- California Code of Regulations
- Special Education Policies and Procedures Manual (July 2007)
- BUL-2087.0: Mobility Opportunities Via Education (MOVE)

ASSISTANCE:
- Rosaura Sanchez: Assistive Technology/Low Incidence Programs (213) 241-6200
- Kim Miller: Deaf and Hard of Hearing/Audiology Programs (323) 669-4360
- Kim Miller: Programs for the Visually Impaired (323) 962-9560
- Rosaura Sanchez: Occupational Therapy and Physical Therapy Programs (213) 241-6200
PROCEDURES FOR ORDERING EQUIPMENT FOR STUDENTS WHO ARE DEAF OR HARD OF HEARING

All requests for low incidence funding for students who are deaf (DEA) or hard of hearing (HOH), including requests from Marlton School, will be processed by the Deaf and Hard of Hearing (DHH) and Audiology Programs. The procedure for ordering material and/or equipment for DHH students is outlined below.

1. Assessment Process

An audiogram documenting a hearing loss at the level of disability is required. In addition, an assessment by a credentialed teacher of the deaf and hard of hearing will be conducted. The DHH teacher will review the student's educational records and conduct an observation/assessment. The teacher will document in the assessment report that the need for specialized materials, equipment and/or services, is specifically due to the student's hearing loss.

2. IEP Documentation

At the IEP meeting, the assessed need for specialized material, equipment and services is documented in the present level of performance and in FAPE Part I under “Low Incidence Support” and “Low Incidence Equipment.”

- IEP Documentation: The following IEP pages must accompany any order submitted for processing:
  - Page 1: Student information.
  - Page 3: Documentation of the need for specific type of equipment or material, making sure to use generic descriptors and NOT specific product (brand) names in present levels of performance.
  - Page 4: Determination of eligibility of DEA or HOH.
  - FAPE Part I: Indicate that student qualifies for LI funding under Deaf and Hard of Hearing and document materials and equipment. Indicate specific accommodations including reading medium, and specific equipment.
  - FAPE Part II: If student is served through itinerant program indicate in Services section the code (08) Deaf and Hard of Hearing Itinerant.
  - Page 10: Parent must sign IEP, agreeing to the LI components of the IEP and need for equipment.

3. Procedure for Ordering Equipment

The teacher/provider will send the completed “Request for Low Incidence Equipment and/or Material” (Attachment D), the “Request for New Low Incidence Expenditure” (Attachment E) and the required IEP pages to the Deaf and Hard of Hearing Program Coordinator for approval. If the request is approved, it will be submitted for processing. If the request is not complete or there is a question about the appropriateness of the purchase through LI funding, the LI Coordinator (or designee) will contact the teacher/provider with an explanation of what is needed to approve the request or provide an explanation of why the request was denied.
If the request is approved, a search is made for equipment/materials requested in the DHH Low Incidence Database. If the equipment or material must be purchased, a written quote from the vendor is required and attached to the above documentation. Once the item is approved by the Coordinator, it is submitted for ordering.

4. Receiving and Inventory Procedure for LI Material and Equipment

Once the order is received, an identifying number is assigned to the item(s) and the information is entered into the DHH LI Database. All materials must be labeled with the assigned number.

For individual equipment, whether newly purchased or simply distributed from the existing DHH LI inventory, teachers, students, and their families are given a “Responsibility Contract” (Attachment F) to maintain the equipment in good working order.

5. Shipping and Distribution of LI Materials and Equipment

All materials and equipment are delivered through either of the following two processes:

1. DHH itinerant teacher or audiologist checks out the items at the DHH office and delivers them to the school site.
2. If an order is for a DHH special day program student, they are transported directly to the school site – arrangements for delivery will be made through the DHH office.

6. LI Inventory Requirements

Each school must also keep a Low Incidence Inventory of materials or equipment. At the end of each year, the school is responsible for updating the LI inventory. The inventory must be updated to reflect the current status of the equipment, including newly acquired items, and items removed for servicing. The inventory should be current and available upon request.

When a low incidence piece of equipment or material is no longer needed by the student(s), it is taken off the campus inventory, and sent back to the DHH office for distribution to another student.

All questions regarding low incidence materials/equipment for Deaf or Hard of Hearing students should be referred to the DHH program at (323) 669-4360.

Amplification

The following is the procedure when the request for low incidence funding involves amplification:

1. Assessment

A recent (within one year) audiogram documenting a hearing loss is completed by an audiologist. The DHH itinerant completes the Request for Amplification Form and sends it along with the current audiogram to the DHH/ARU Office. An educational audiologist reviews the audiogram and Request for Amplification Form, and determines the most appropriate system. At the IEP meeting, the assessed need for classroom amplification is documented in the present level of performance and in FAPE Part I under Low Incidence Support and Low Incidence Equipment.
2. **IEP documentation**

The following IEP pages must accompany any order submitted for processing:

- **Page 1:** Student information.
- **Page 3:** Documentation of the need for specific type of equipment or material, making sure to use generic descriptors and NOT specific product (brand) names in present levels of performance.
- **Page 4:** Determination of eligibility of DEA or HOH.
- **FAPE Part I:** Indicate that student qualifies for LI funding under Deaf and Hard of Hearing and document materials and equipment. Indicate specific accommodations including reading medium, and specific equipment.
- **FAPE Part II:** If student is served through itinerant program indicate in Services section the code (08) Deaf and Hard of Hearing Itinerant.
- **Page 10:** Parent signature indicating agreement with at least LI components of the IEP and need for equipment.

3. **Ordering Procedure**

Amplification systems are purchased under a District contract. If the need to order amplification equipment from a non-contracted vendor arises, a quote is obtained by the Senior Educational Audiologist and it is submitted for approval to the Deaf and Hard of Hearing/ Audiology Program.

   a. **Receiving and Inventory Procedure:** When amplification is received at the DHH/Audiology office, it is inventoried by serial number and placed onto the DHH/Audiology LI database.

   b. **Assignment of Amplification Equipment:**
      - **DHH Special Day Programs:** Assigned educational audiologist will determine appropriate amplification. This amplification will be set for student’s hearing loss and recorded on the DHH/Audiology FM inventory. The school must list the LI amplification equipment on the receiving school’s inventory. At the end of the school year, the equipment is removed from campus for servicing and returned to the student upon his/her return to school.
      - **Itinerant Services:** The DHH itinerant completes the Request For Amplification Form and sends it along with the current audiogram (within 1 year) to the DHH/ARU Office. An educational audiologist reviews the audiogram and Request for Amplification Form, determines the most appropriate system for the student to use, and sets the amplification to the student’s hearing loss. Pertinent identifying information is recorded on the Request for Amplification Form.

   c. **Distribution of Amplification Equipment:**
      - Amplification systems are distributed from the DHH/ARU Office to the DHH itinerant teacher. An Amplification Check-Out form is completed and signed by DHH itinerant teacher/audiologist who will be responsible for the equipment. The information is then placed in the DHH/Audiology LI Database.
• The amplification is then delivered to the student at his/her school of attendance. The receiving administrator, classroom teacher and responsible DHH or ARU personnel sign and date the Amplification Check-Out form indicating the FM equipment has been provided to the student and is on the school campus. The school must list the LI amplification equipment on the receiving school’s inventory. At the end of the school year, the amplification equipment is picked up for servicing and the same personnel sign that it has been removed from the school site.

• The amplification systems are then checked in at the DHH/ARU office and the responsible personnel sign that it has been returned. A copy of the Amplification Check-Out form is kept in the student’s folder with all pertinent information noted in the database. This LI procedure is repeated for each school year.

All questions regarding auditory amplification for students with a hearing impairment should be referred to the Audiological Resource Unit at (323) 669-4360.
PROCEDURES FOR ORDERING EQUIPMENT FOR STUDENTS WITH VISUAL IMPAIRMENT

All low incidence orders for the visually impaired, including Blend School, are handled through the District’s Visually Impaired (VI) Program. The procedure for ordering low incidence materials and equipment for visually impaired students is outlined below.

1. Assessment Process

Documentation is received from ophthalmologist or optometrist that an impairment in vision exists at the level of disability. Following receipt of eye medical information, an assessment of the student’s functional vision is conducted by a credentialed teacher of the visually impaired (the Functional Vision Assessor). The assessor documents in the assessment report the need for specialized materials, equipment, and services related to the student’s visual impairment.

At the IEP the assessed need for specialized material, equipment and services is documented in the present level of performance, and in FAPE Part I under Low Incidence Support, Instructional Accommodations and Low Incidence Equipment.

2. IEP documentation

The following IEP pages must accompany any equipment order submitted for processing:

- **Page 1:** Student information.
- **Page 3:** On PLP, document eye condition and type of vision impairment; need for specific type of VI equipment making sure to use generic descriptors and NOT specific products.
- **Page 4:** Determination of eligibility (VI). Be sure and indicate whether student is blind (BL) or partially sighted (PS).
- **FAPE Part I:** Indicate that student qualifies for LI funding under Visual Impairment, and document materials and equipment. Indicate specific accommodations including reading medium, and specific equipment.
- **FAPE Part II:** If student is served through itinerant program indicate in Related Services section the code (02) Blind/partially sighted.
- **Page 10:** Parent signature indicating agreement with at least LI components of the IEP and need for equipment and/or materials.

3. Procedure for Ordering Equipment

To request specialized books or equipment, the VI teacher will call, fax or send an email to the Specialized Materials and Equipment Coordinator for the VI Program. The coordinator completes an ordering form and the teacher will be given a page number as their reference for their order. If the order is for equipment, it must be documented through the student’s IEP goals and objectives unless it is considered a stock VI item (e.g. magnification device, slant board, specialized software, etc.). A copy of the student’s current IEP must accompany the request, along with Attachment D.
A search is made for the books/equipment requested. The search may involve: (a) checking the existing VI database to see if a copy is available in the inventory or if a VI Resource Room has a copy that can be borrowed; or (b) searching CA VI List-Serv for books and materials. This includes searching Instructional Materials Ordering and Distribution System (IMODS), Clearinghouse for Specialized Material and Technology (CSMT), American Printing House Louis Data Base, Recordings for the Blind and Dyslexic (RB&D) and Amazon.

If the equipment must be purchased, a written quote from the vendor is acquired. Once the item is approved by the Low Incidence Coordinator, it is submitted.

4. Receiving and Inventory Procedure for LI Materials and Equipment

Once the materials and equipment are received they are processed. An identifying number is assigned to the item and the information is entered into the VI database. All materials must be labeled with the assigned number.

For individual equipment, whether newly purchased or distributed from the VI existing inventory, teachers, students and their families are given a “Responsibility Contract” (Attachment F). On this form they agree to maintain the equipment in good working order for signature before equipment is distributed.

5. Shipping and Distribution of LI Materials and Equipment

The materials are shipped and/or delivered through the following methods: (1) items that are shipped are bundled at the Braille Resource Center (BRC) and sent to the teacher at their mailing school; (2) teachers may pick up their material at the VI Office located at Frances Blend School; or (3) the Orientation and Mobility Instructor (O&M Instructor) may deliver items when they are going to see one of their students at a nearby school. The shipping, pick up date, or delivery date is entered on the original request form (Attachment D). The computer number, VI teacher, student’s last name and date of circulation are entered into the VI database.

6. LI Inventory Requirements

Each school must also keep a Low Incidence Inventory of materials or equipment. At the end of each year, the school is responsible for updating the LI inventory. The inventory must be updated to reflect the current status of the equipment, including newly acquired items, and items removed for servicing. The inventory should be current and available upon request.

When a low incidence piece of equipment or material is no longer needed by the student(s), it is taken off the campus inventory, and sent back to the DHH office for distribution to another student.

All questions regarding low incidence materials/equipment for Deaf or Hard of Hearing students should be referred to the DHH program at (323) 669-4360.

All questions regarding low incidence materials/equipment for visually impaired students should be referred to the VI program at (323) 962-9560.
PROCEDURES FOR ORDERING EQUIPMENT FOR STUDENTS WITH ORTHOPEDIC IMPAIRMENT

All low incidence orders for students with orthopedic impairments attending general education sites are processed through the District’s Occupational Therapy and Physical Therapy Office. The procedure for ordering material and/or equipment for students with orthopedic impairments is outlined below:

1. **Assessment Process**

   The student is identified as having a need for equipment through an assessment (formal or informal, as appropriate) and the results of that assessment indicate the student will require adaptive equipment in order to access his/her educational environment. At the IEP meeting the assessed need for specialized material and equipment is documented in the present level of performance, and in FAPE Part 1 under Low Incidence Support and Low Incidence Equipment.

2. **IEP documentation**

   The following IEP pages must accompany all orders submitted for processing:

   - **Page 1:** Student information
   - **Page 3:** Must document need for specific type of equipment (i.e. pencil grip, trackball, adapted seating system, adapted scissors, etc.) making sure to use generic descriptors and NOT specific product (brand) names in present levels of performance
   - **Page 4:** Determination of special education Low Incidence eligibility
   - **Page 5:** Goals to be formulated related to item(s) needs, if appropriate
   - **FAPE Part I:** Indicate that student qualifies for LI funding, and document materials and equipment. Indicate specific accommodations including any specialized equipment
   - **FAPE Part II:** If student is served through itinerant program indicate in Services.
   - **Page 10:** Parent must sign IEP, agreeing to at least therapy services/need for equipment

3. **Procurement of Equipment for Students at General Education Sites**

   Before ordering equipment, therapists should do the following:

   - A trial should be conducted by the site-based OT or PT to ensure correct size and type of equipment;
   - After identifying the appropriate seating or positioning equipment, including treatment tables and adapted equipment for hygiene, the site-based OT or PT can then procure the equipment either by transferring the equipment from one site to another or by ordering a new piece of equipment;
   - All efforts should be made to use preexisting equipment rather than ordering new equipment. Parts and accessories are available at the Inventory bin sites.
4. **Transferring Equipment**

- If transferring from an active school to the receiving school (please see Transportation Section on p.5 of this document), the therapist responsible for the equipment taken from that school should complete the *Outgoing Equipment Transfer Form* (Attachment I) and email it to their school or special education administrator. This is to ensure that they are aware that equipment is being taken off campus. The therapist responsible for procuring the equipment for their site (receiving school) should complete the *Incoming Equipment Transfer Form* (Attachment J) and email it to the school or special education administrator.

- If transferring from an Inventory bin to the receiving school (please see Transportation Section on p.5 of this document), please complete the *Incoming Equipment Transfer Form* (Attachment J). If there is no LI number, please contact Related Services at Beaudry for a number. This form should be emailed to the administrator/Special Education personnel at the receiving school.

- Send these documents to Related Services at Beaudry: The *Incoming Equipment Transfer Form* (Attachment I), the *Request for Low Incidence Equipment or Materials* and *Request for New Low Incidence Expenditure* (Attachments D and E), and appropriate IEP pages (see information in #2 IEP Documentation above) should be sent to Related Services at Beaudry in order to justify the need for that specific student. A copy of their assessment for review by the LI therapist should be attached if the IEP is unclear.

- If there is no available equipment within the District Inventory, the school therapist will:
  - Use the *Request for Low Incidence Equipment or Materials* and *Request for New Low Incidence Expenditure* forms (Attachments D and E) to order new equipment, attaching the same IEP pages as listed above. In addition, they will submit a photocopy of the equipment, a blank order form from vendor, and current quote from a vendor. Send this information via school mail to the therapist responsible for reviewing LI orders for review (LI therapist).
  - The LI therapist will review the order request and forward to Related Services Administrative Coordinator for processing or return to therapist if revisions are necessary.
  - Check on an ongoing basis to see if equipment has arrived at school site.

5. **Procurement of equipment for students at special education sites (Except Marlton and Blend)**

If the LI equipment is for a student at a special education site, the paperwork must be submitted to the school administrator or designee for signature. It must then be submitted to the LI therapist for review and processing or returned to school if revisions are necessary.
6. When students transfer out of LAUSD but remain in the state of California, specialized equipment that has been purchased for that student’s exclusive use through LI funds the equipment must follow the student to the new school. It is the new district’s responsibility to transport and maintain the equipment. If the equipment is shared by more than one student, the equipment does not go with the student to the new district. It is the new district’s responsibility to order appropriate equipment for the student.

7. Delivery of Equipment (General Education Campus):

- Once equipment is received at the school site indicated on the Request for LI Equipment or Materials form (Attachment D), the provider receiving the equipment is to immediately contact Related Services at 213-241-6200 to note delivery and obtain an LI identification number.
- Label the equipment with LI identification number.
- Submit all invoices/paperwork related to the equipment to: Beaudry Building, 18th Floor, Related Services, Attn: LI
- If there are any questions, providers are to call their senior or coordinating therapist.

Delivery of Equipment (Special Education Campus):

- Once equipment is received at the special education site, school personnel are to sign and date the packing slip and FAX it immediately to the low incidence clerk at 213-241-8436.
- Inventory numbers are not assigned centrally for LI equipment at special education sites (with the exception of Frances Blend School). It is each school site’s responsibility to maintain its own LI equipment inventory as part of its annual equipment inventory (see Low Incidence Equipment Inventory section on page 6 of this document) and to assign and label all equipment with an LI inventory control number as soon as it arrives on campus.
- Schools and programs will receive a yellow copy of the P.O. and a copy of the order after it has been processed in IFS.
- Please provide Related Services with a contact name if there are questions regarding an order if it has been determined that the contact will be someone other than the administrator of the school or program.
REQUEST FOR LOW INCIDENCE EQUIPMENT OR MATERIALS

Date: ____________________________ Provider Name: ____________________________ Location

Name of School or Program: ____________________________ Location Code: __________

Administrator of School or Program: ____________________________

Signature of Administrator Authorizing Request: ____________________________

Student Name: ____________________________ DOB: ____________________________

Eligibility per IEP:  

☐ DEA  ☐ DBL  ☐ HOH  ☐ OI  

☐ MD-H  ☐ MD-O  ☐ MD-V  ☐ VI

For new equipment orders, the following documentation is required for approval:

a. IEP pages (Dated: ________):
   1 – Student information cover page
   3 – Present levels of performance documenting an assessed need for specialized equipment
   4 – Eligibility - Including LI Eligibility
   5 – Goals – If support is academic
   6 – FAPE Page 1 – LI Support Documentation
   10 - Parent Signature for IEP consent

b. Assessment report, if appropriate, documenting an assessed need for specialized equipment.

c. Picture of equipment (if appropriate)

d. Company order form / quote from vendor, or page 2 on back side of this form if applicable.  NOTE: Please complete 1 of form for each vendor/company

☐ Approved by: ____________________________ Signature ____________________________ Date ____________________________

☐ Not Approved

☐ not LI eligible  ☐ LI eligibility not indicated
☐ incomplete IEP documentation  ☐ no assessment
☐ goals/objectives do not incorporate use of specialized equipment
☐ incomplete assessment; needs ______
☐ assessment not completed by appropriate discipline; needs evaluation by ______
☐ ordering information is incomplete; needs ______

Comments:

☐ Low Incidence and Assistive Technology Programs  ☐ Deaf and Hard of Hearing/Audiology Programs

☐ Occupational Therapy and Physical Therapy Programs  ☐ Visually Impaired Program

*** Please complete “Supplemental Request for Low Incidence Expenditure” when ordering replacement parts for existing equipment***
# Request for New Low Incidence Expenditure

Please order the equipment from the following vendor/company:

- **Contact Name:** ____________________
- **Vendor/Company Name:** ______________
- **Address:** ____________________________
- **City/State/Zip:** ______________________
- **Phone#:** ___________ **Fax#:** ___________
- **Date Submitted:** ___________

Other Specifications: ______

<table>
<thead>
<tr>
<th>Quantity</th>
<th>Model #</th>
<th>Description of Equipment (include manufacturer’s name)</th>
<th>Price</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2.</td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>3.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>4.</td>
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<tr>
<td>5.</td>
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<td></td>
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<tr>
<td>6.</td>
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<tr>
<td>7.</td>
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<td></td>
<td></td>
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<tr>
<td>8.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>9.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>10.</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Subtotal

Tax (8.25%)

Shipping Cost

Grand Total

**Equipment to be delivered to:**

- **School Name:** ____________________ **Location Code:** ______
- **Administrator Authorizing Request:** __________________________
- **Delivery Location (Room #):** ______________________________

- **Student Name:** ____________________ **DOB:** ______ **Requestor’s Name:** ______

Eligibility per IEP: 
- [ ] DEA 
- [ ] DBL 
- [ ] HOH 
- [ ] OI 
- [ ] MD-H 
- [ ] MD-O 
- [ ] MD-V 
- [ ] VI

*** Please complete “Supplemental Request for Low Incidence Expenditure” when ordering replacement parts for existing equipment***
Los Angeles Unified School District
Division of Special Education

Responsibility Contract

Student Name: _____ Date: _____

School: _____

In accordance with _____________ IEP, the following equipment is being issued. This equipment is valued at $________.

It is our expectation that with the signatures of the parent, teacher and student on this contract, there will be a combined commitment for the care of this District equipment.

The equipment will be returned to the _____________ Program in working order at the appropriate time.

Equipment

<table>
<thead>
<tr>
<th>Description</th>
<th>Serial Number</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Please indicate by signing below that you have read this letter.

All signatures must be obtained before equipment is issued

______________________________
Student

______________________________
Parent

______________________________
Teacher/Related Services Personnel

______________________________
School Personnel

Once signatures are obtained, it is the responsibility of the teacher/ related services personnel to return the signed letter to the program office it originated from.
# LOS ANGELES UNIFIED SCHOOL DISTRICT

## Division of Special Education

### EQUIPMENT LOAN SERVICE

**Assessor/Provider/Therapist's Name:**

**Student's Name:**

**D.O.B.:**

**Local District:**

**School:**

**Location Code:**

### Item Name | LI # | Serial # | LAUSD #
---|---|---|---

**Additional Accessories:**

**Comments:**

<table>
<thead>
<tr>
<th>RECEIVING AUTHORIZATION</th>
<th>RETURN TO INVENTORY AUTHORIZATION</th>
<th>TRANSFER AUTHORIZATION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Administrator's Signature:</td>
<td>Administrator's Signature:</td>
<td>Administrator's Signature:</td>
</tr>
<tr>
<td>Date:</td>
<td>Date:</td>
<td>Date:</td>
</tr>
</tbody>
</table>

Teacher's Signature:

**Date:**

Assessor/Provider/Therapist's Signature:

**Date:**

---

Office Use

Transfer Location | LD | Location Code
---|---|---

Rev.1/2007
LOS ANGELES UNIFIED SCHOOL DISTRICT
Division of Special Education

LOW INCIDENCE FUNDS: QUESTIONS AND ANSWERS

<table>
<thead>
<tr>
<th>QUESTION</th>
<th>ANSWER</th>
</tr>
</thead>
<tbody>
<tr>
<td>What is low incidence (LI)?</td>
<td>It is a funding source from the state of California for students who have disabilities which occur at a low rate of incidence.</td>
</tr>
<tr>
<td>Who qualifies for LI?</td>
<td>Students who have a disabling condition associated with vision, hearing, or severe orthopedic impairment.</td>
</tr>
<tr>
<td>What does severe orthopedic impairment mean?</td>
<td>Orthopedic impairment: Impairments caused by congenital anomalies, diseases and other conditions. Conditions resulting in severe orthopedic impairments include but are not limited to: Cerebral palsy, muscular dystrophy, spina bifida, spinal cord injuries, head traumas, juvenile rheumatoid arthritis, and tumors. A severe orthopedic impairment is persistent, and significantly restricts an individual’s normal physical development, movement, and activities of daily living. Reference Source: CDE “Program Guidelines for Individuals who are Severely Orthopedically Impaired”, 1992</td>
</tr>
<tr>
<td>What are the procedures for the use of LI funds?</td>
<td>Authorization for the use of Low Incidence funds for specialized equipment is contingent on all of the following: An assessment of the student by a person knowledgeable of the disability; A written assessment report submitted to the IEP team; An IEP team decision indicating the need for the specialized equipment.</td>
</tr>
<tr>
<td>Who evaluates for LI funded equipment?</td>
<td>Staff credentialed in disciplines which deal with vision, hearing, and severe orthopedic impairments.</td>
</tr>
<tr>
<td>If a student qualifies for LI, can LI funds be used for all equipment for this student?</td>
<td>No. LI funds supplement, not supplant, the existing educational program</td>
</tr>
<tr>
<td>What is the procedure for submitting a request for LI funds?</td>
<td>Follow the procedures outlined in the OT PT AT Handbook, Specialized Equipment / Assistive Technology section, and Bulletin 3666.1 Policies and Procedures for the Use of Low Incidence Funds</td>
</tr>
</tbody>
</table>
OUTGOING EQUIPMENT TRANSFER FORM

The equipment listed below has been moved to your school site from District LI inventory for use by the student listed below. Each school site is responsible for keeping an inventory of all equipment used on a school campus. Please add this/these item(s) to your school site inventory. If you have any questions, please contact the therapist listed below at the contact number listed.

<table>
<thead>
<tr>
<th>Item Name</th>
<th>LI #</th>
<th>Serial #</th>
<th>LAUSD #</th>
</tr>
</thead>
</table>

Additional Accessories:

Comments:
Los Angeles Unified School District  
RELATED SERVICES DEPARTMENT  
Phone: (213) 241-6200      Fax: (213) 241-8435  

INCOMING EQUIPMENT TRANSFER FORM  

The equipment listed below has been moved to your school site from District LI inventory for use by the student listed below. Each school site is responsible for keeping an inventory of all equipment used on a school campus. Please add this/these item(s) to your school site inventory. If you have any questions, please contact the therapist listed below at the contact number listed.

Administrator’s Name:  
Student’s Name:  
Student ID number:  
D.O.B.:  
Therapist’s/Provider’s Name:  

<table>
<thead>
<tr>
<th>Item Name</th>
<th>LI #</th>
<th>Serial #</th>
<th>LAUSD #</th>
</tr>
</thead>
</table>

Additional Accessories:

Comments:
# Los Angeles Unified School District
## Division of Special Education

## Orthopedic Impairment Low Incidence Funds:
### Questions and Answers

<table>
<thead>
<tr>
<th>Questions</th>
<th>Answers</th>
</tr>
</thead>
</table>
| How do I provide LI-funded equipment for a student who is receiving occupational therapy or physical therapy services? | The best case scenario is:  
  a) equipment is available for trial and  
  b) there is IEP documentation and a parent signature giving approval for a period of diagnostic therapy using several types of equipment. If this is the case, an Assessment Plan is not required. Performance criteria should be established. Documentation of equipment use during this trial period should be made as part of the ongoing treatment notes. This type of documentation can be used at the next IEP as a rationale for equipment purchase. Statements of current levels of performance must include justification for the acquisition of the specific piece of equipment.  

*If:*  
- there is no equipment available for trial use, or  
- there is no prior language on the IEP indicating the need for specialized equipment, or  
- the particular goal area associated with the equipment has not been previously assessed  

*Then:*  
- The therapist, in collaboration with the teacher, determines if there is a need for specialized equipment for motor access to the curriculum.  
- If a need for specialized equipment for motor access to the curriculum was found, then the equipment inventory within the District should be explored prior to placing a new order.  
- Schedule an IEP to discuss the needs with the parents and team members, as well as to document the possible need for the LI-funded specialized equipment, and formulate a goal addressing the area identified where the equipment is to be used. |

<table>
<thead>
<tr>
<th>Questions</th>
<th>Answers</th>
</tr>
</thead>
<tbody>
<tr>
<td>What is the role of the occupational therapist or physical therapist if a special education student is not currently receiving OT or PT services and the school site requests motor equipment?</td>
<td></td>
</tr>
</tbody>
</table>
- An Assessment Plan should be developed requesting an assessment for specialized equipment for motor access.  
- If through the assessment, the therapist in collaboration with the teacher and other team members as appropriate, determines a need for specialized equipment (AT) for motor access to the curriculum, he/she should explore the equipment |
<table>
<thead>
<tr>
<th>QUESTIONS</th>
<th>ANSWERS</th>
</tr>
</thead>
</table>
| What is the role of the occupational therapist or physical therapist with regard to recommendations for M.O.V.E. equipment? | LAUSD policy requires consultation by an OT or PT when motor equipment is recommended. (See BUL-2087.0 for more info) The therapist assesses the student (formally or informally), in collaboration with the teacher to determine if there is a need for specialized equipment for motor access to the curriculum.  
  - A formal assessment (signed Assessment Plan) is required if the therapist is not familiar with the student; if the teacher is not knowledgeable of the needs of student's with physical disabilities; and/or if the school therapist feels it is necessary despite having knowledge of the student.  
  - An informal assessment (no Assessment Plan) is required when the therapist is familiar with the student (e.g. through M.O.V.E. consultation, previously on therapist’s caseload, etc.); and when the teacher is knowledgeable of the needs of student’s with physical disabilities |
| What should an LAUSD occupational therapist or physical therapist do if he/she is uncertain about what specialized equipment/AT devices might best meet the child’s needs? | Utilize LAUSD resources to assist in equipment review and selection for a student. Contact your Senior. Contact the AT program for the OT or PT consultant assigned to your Local District. |
| Does the role of the occupational therapist or physical therapist change depending on if the student attends a general education or special education school? | No.  
You are expected to participate as a member of the school-site assessment team to determine what equipment, if any, will help the student gain motor access to curriculum. |
| What is the role of the LAUSD occupational therapist or physical therapist if a CCS therapist recommends specialized equipment? | LAUSD policy requires that LAUSD staff review all recommendations from outside agencies, including CCS.  
  - The student’s teacher should consult with the LAUSD OT and/or PT.  
  - May need to complete an Assessment Plan and conduct an assessment. |
<table>
<thead>
<tr>
<th>QUESTIONS</th>
<th>ANSWERS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Does the LAUSD occupational therapist or physical therapist need to</td>
<td>Take the CCS recommendations into consideration but use your own professional judgment when making equipment recommendations for school</td>
</tr>
<tr>
<td>evaluate a student every time they need a new version or larger size of</td>
<td>No.</td>
</tr>
<tr>
<td>motor equipment he/she is currently using successfully?</td>
<td>As long as there is documentation of ongoing successful use and the change constitutes an upgrade to the newest version which has features which will benefit the student, or if the change is necessitated by physical growth requiring the next larger size of the device.</td>
</tr>
<tr>
<td></td>
<td>No Assessment Plan is required.</td>
</tr>
<tr>
<td></td>
<td>Complete a Classroom Consultation form documenting benefits of use and rationale for the change in version/size.</td>
</tr>
<tr>
<td></td>
<td>Submit this consultation form as document for new purchase. Give copy to parent and teacher.</td>
</tr>
<tr>
<td>What is the role of the LAUSD occupational therapist or physical therapist</td>
<td>Refer the student to the Student Success Team (SST) to determine if accommodations are appropriate</td>
</tr>
<tr>
<td>if a student is not eligible for special education and you receive a</td>
<td>SST may need to develop a 504 plan</td>
</tr>
<tr>
<td>request for specialized equipment for motor access?</td>
<td>If an Assessment Plan is generated for OT or PT it should be part of a comprehensive evaluation which addresses all areas of suspected disability.</td>
</tr>
<tr>
<td>What is the role of the occupational therapist or physical therapist</td>
<td>If you anticipate making recommendations for new equipment purchase notify the school-site administrator in advance of the meeting so inventory and other resources can be reviewed.</td>
</tr>
<tr>
<td>regarding funding for specialized equipment?</td>
<td>Notify the school-site administrator if student is eligible for specific funding (e.g. LI funding) for the recommended equipment.</td>
</tr>
<tr>
<td></td>
<td>Complete the Low Incidence Order form.</td>
</tr>
<tr>
<td></td>
<td>For Regular education school sites, submit through OT and PT office.</td>
</tr>
<tr>
<td></td>
<td>For Special Education school sites, submit to school administrator.</td>
</tr>
<tr>
<td></td>
<td>Supply vendor information and specific device descriptions with Low Incidence order forms, after the IEP meeting to facilitate the processing of an order.</td>
</tr>
</tbody>
</table>