
ONE-TIME PURCHASES

EA1, EA2, SM1, SM2, MAG

Directive 2.23

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Purpose

This directive creates policy and procedure for one-time purchases for the following services: environmental adaptations to the home or vehicle (EA1 and EA2); specialized medical and assistive technology needs (SM1 and SM2); and state funded one-time purchases (MAG).

Definitions

Contracts Administrator - means the division staff who review and approve contracts and contract changes.

Division (DHHS DSPD) - means the Department of Health & Human Services Division of Services for People with Disabilities.

EA1 - means the service code for environmental adaptations to the home. EA1 is for equipment and physical adaptations to the person's residence that are necessary to meet their basic needs and assure the health, welfare, and safety of the person.

EA2 - means the service code for environmental adaptations to a vehicle. EA2 is for vehicle equipment or adaptations to the person's vehicle that are necessary to meet their basic needs and assure the health, welfare, and safety of the person.

SM1 and SM2 - means the service codes for specialized medical and assistive technology equipment. SM1 and SM2 are for items that enable the person to increase their abilities to perform activities of daily living (ADLs) or; to perceive, control, or communicate with their environment. These codes are also used for the purchase of medical equipment not available through insurance.

MAG - means the service code for state funded one-time purchases. MAG purchases are for items needed to meet a person's basic needs and ensure the health, welfare, and safety of the person.

Person - means an individual who is in services, or who is eligible for services with the division.

Resources - means help from family, friends, or community members; resources through insurance; or similar resources.

Request for Services (RFS) – means a process integrated into USTEPS that facilitates the creation of a Person-Centered Budget through an initial budget and then any budget adjustments that are made by submitting the following to the Request for Services team for review: proposed service codes, units, and rates; designated start and end dates; and evidence of need.

Support Coordinator: means a division employee that provides case management services to assist persons and

their families to develop plans to find the most appropriate services and to select the most appropriate service delivery model based on the individual needs of the person.

I. Policy

1. Requirements for EA1 one-time purchases:
 - a. Items could not otherwise be funded by the person or through insurance;
 - b. Person has exhausted all other available resources;
 - c. A prescription for the equipment and/or adaptation is required from the person's medical provider.
 - d. Documentation of Medicaid and/or private insurance denial is required.
 - e. Purchases must serve to allow the person to remain in their housing within the community and avoid placement into a nursing facility, or intermediate care facility (ICF).
 - f. EA1 purchases are only for use in the private residence of the person, or the person's family. Equipment/adaptations are not available in residences that are owned or leased by a provider.
 - g. If a person or family requests an environmental adaptation for a new home build, they must submit documentation of the difference between the adaptation cost and the standard non-adaptive cost. The division will pay the difference between the costs.
 - h. If the request for EA1 is greater than \$30,000 or if multiple requests for individual EA1/EA2/SM1/SM2 services are requested, approval from the division finance administrator is required.
2. Requirements for EA2 one-time purchases:
 - a. Items could not otherwise be funded by the person or through insurance.
 - b. Person has exhausted all other available resources.
 - c. A prescription for the equipment and/or adaptation is required from the person's medical provider.
 - d. Documentation of Medicaid and/or private insurance denial is required.
 - e. Purchases must serve to allow the person to remain in their housing within the community and avoid placement in a nursing facility, or ICF.
 - f. The vehicle must be owned by, or in process of being closed on for purchase by the person, or a family member with whom the person lives. Under some circumstances the owner could be someone with consistent and on-going contact with the person, such as a non-relative who provides primary long-term support to the person.
 - i. The vehicle owner may not be a paid provider.
 - g. If the request for EA2 is greater than \$40,000, or if requests for multiple individual EA1/EA2/SM1/SM2 services are requested, approval from the division finance administrator is required.
 - h. EA2 purchases must meet the basic needs of the person to ensure health and safety.
3. Requirements for SM1 and SM2 one-time purchases:
 - a. Items could not otherwise be funded by the person or through insurance.
 - b. Person has exhausted all other available resources.
 - c. With the exception of basic assistive technology equipment such as tablets and similar items, a prescription for the equipment is required from the person's medical provider.
 - d. With the exception of basic assistive technology equipment such as tablets and similar items, documentation of Medicaid and/or private insurance denial is required.
 - e. If the request for SM1 or SM2 is greater than \$10,000 or if requests for multiple individual EA1/EA2/SM1/SM2 services are requested, approval from the division finance administrator is required.
4. Requirements for MAG for one-time purchases:
 - a. Items could not otherwise be funded by the person or through insurance.
 - b. Person has exhausted all available resources.
 - c. The item or service does not meet the definition of an EA1, EA2, SM1, or SM2 purchase.
 - d. Items and services may only be one-time emergency purchases. Items and services that require ongoing funding will not be approved.

II. Procedure

1. Support coordinators will determine the need for an EA1, EA2, SM1, SM2, or MAG one-time purchase.
2. Support coordinators may assist persons to obtain the required documentation needed for an RFS.
3. Support coordinators will submit the RFS and supporting documentation to the RFS team.
4. The RFS team reviews requests and then approves or denies them.
5. If approved, the contracts administrator will email an award notification to the approved vendor.
6. After the purchase is complete the contracts administrator will collect all project documentation.
7. The contracts administrator will create an approval for the purchase in USTEPS and notify the support coordinator to add the purchase into the person's plan.
8. The contracts administrator will upload all related purchase documents into USTEPS.
9. The contracts administrator will send the payment documents to the finance team to enter the payment in USTEPS.
10. Support coordinators will verify that the payment was made successfully.
11. Division leadership may also determine and then approve purchases, at their own discretion, outside of the procedures listed above.