

**Checklist for  
Required Documents  
for Funding Packet**

**The  
Funding  
Process**

**From SLP**

- 1. Evaluation Report
- 2. Quote Request Form
- 3. Certification of Medical Necessity – script from Primary Care Physician
- 4. Face-to-Face notes (Medicare and Medicaid)

**Completed by Family:**

- 1. Client Information Sheet
- 2. Release of Information
- 3. Feature Unlock Form
- 4. Place of Service

**Needed from Family:**

- 1. Insurance cards – front and back copies of ALL insurances

**Resources:**

- 1. Evaluation Report Template
- 2. Justification Samples
  - a. XTNDR Battery
  - b. Language Development Kit
  - c. Multiple Access Method
  - d. Keyguard Bundles

**Remember - your ATS is there to help!** They can assist in gathering the necessary forms from families, completing the quote request forms and obtaining the face-to-face notes and scripts. They will just need your *evaluation report, caregiver/guardian contact information* and a *release of Information* from the family to assist with obtaining the documents.

For questions and want to learn more about Forbes AAC's funding process go to [forbesaac.com/funding](http://forbesaac.com/funding) or [funding@forbesaac.com](mailto:funding@forbesaac.com)

**Forbes AAC**

181 Illinois Ave. South  
Mansfield, OH 44905

phone 419.589.7688

fax 419.589.5146

