

North Carolina Infant-Toddler Program

Financial Review and Hardship Adjustment Application: Instructions

- PURPOSE:** The **Financial Review and Hardship Adjustment Application** must be completed by the family and submitted to the Children's Developmental Services Agency (CDSA) business office with all required supporting documentation for the information to be considered in a sliding fee scale adjustment.
- INSTRUCTIONS:** The *Client Information* and *Hardship Information* sections of the application must be fully completed by the family and submitted to the CDSA business office. The service coordinator can assist in answering any questions the family may have about completing these sections.
- The CDSA business office must complete the final recommendations section of the application, which is highlighted grey.
- The CDSA business office must enter the Date Completed Application Received, which is the date the application and all required supporting documentation is received from the family. Date format is mm/dd/yy.
- Next, the CDSA business office staff must enter the Current SFS Percentage, the Current AGI or other approved income applied to the SFS, and the Date Previously Determined or the date information was last verified. Date format is mm/dd/yy.
- Next, the CDSA business office must recommend an adjustment decision or make the recommendation to maintain the current SFS percentage using the appropriate check boxes. The CDSA must use the supporting information submitted and make any required re-calculation of the SFS percentage using the supporting information to support the recommendation. When making an adjustment recommendation, all adjustment details must be completed. When not recommending an adjustment, a brief summary of reason is required. All supporting documentation should be stored in the financial record.
- Next, the CDSA Director must review and approve the recommended decision. Once final decision is approved, the Service Coordinator must communicate the information to the family and update the family's financial consent form.
- DISPOSITION:** Infant-Toddler Program records, including financial and automated information, must be maintained based upon the Infant Toddler Program's record retention policy. Records must be archived in accordance with state requirements to ensure their preservation for the required length of time.