



# Medical-surgical benefits

Alberta Aids to Daily Living  
Program Manual Section M

Superseded

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## Policy M – 01

### Medical-Surgical Benefits Description

#### Policy Statement

Alberta Aids to Daily Living (AADL) provides funding for medical-surgical benefits for AADL clients with diagnosed chronic conditions to help these individuals maintain independence in their home and community.

Best practice supports the provision of medical-surgical supplies within the context of other clinically recommended strategies to achieve optimal functional outcomes.

Medical-surgical benefit authorizations are processed through the Alberta Blue Cross online health portal. AADL-funded medical-surgical benefits include incontinence briefs, diapers, catheter supplies, injection supplies and ostomy supplies. Details regarding specific benefits are found in Alberta Aids to Daily Living Approved Product List M – Medical-Surgical Supplies at: <https://open.alberta.ca/publications/aadl-program-manual-m>

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# Policy M – 02

## Eligibility Criteria

### Policy Statement

Clients must meet general eligibility requirements found in AADL Program Manual Section GN – General Policies and Procedures on-line at: <https://open.alberta.ca/publications/aadl-program-manual-gn>.

Eligibility for medical-surgical benefits is determined by an AADL authorizer prior to authorization.

AADL provides funding for medical-surgical benefits for clients who meet benefit specific eligibility criteria, outlined in Benefit-Specific Criteria, below.

AADL provides an annual and bi-monthly quantity limit on medical-surgical benefits that clients may be eligible for based on current best practice and expected use. See Alberta Aids to Daily Living Approved Product List M – Medical-Surgical Supplies for benefit-specific limits.

AADL authorizers must confirm client's eligibility for the benefit and the quantity of the benefit must be based on the assessed need of the client.

AADL does not provide funding for medical-surgical benefits for:

- use in acute or sub-acute care facilities except as part of a discharge plan
- use in long-term care facilities – refer to Policy GN – 17 Client Residence
- short-term interventions
- clients who are non-compliant
- benefits chosen for personal preference and not considered basic need according to clinical assessment

Nurses Specialized in Wound Ostomy and Continence (NSWOCC) and nurse continence advisors may contact Alberta Blue Cross for prior approval to request supplies considered duplicate (e.g., catheters and diapers) and/or above quantity and frequency limitations pending clinical rationale.

### Benefit-Specific Criteria

#### Diapers, pads and catheter supplies

- All clients, including palliative clients, must experience moderate to severe incontinence. AADL defines moderate to severe as a client requiring a medical grade product (refer to Alberta Aids to Daily Living Approved Product List M – Medical-Surgical Supplies) a minimum of three times per 24-hour period.
  - Authorizers/ assessors must consider that clients managing their incontinence with products with less absorbency than those listed in Alberta Aids to Daily Living Approved Product List M – Medical-Surgical Supplies may not be experiencing moderate to severe incontinence and may not qualify for funding.
  - Clients receiving funding for catheters who manage with a lesser absorbent product to address leakage between catheterizations and/or stool staining or light stool incontinence may not qualify for funding for diapers.
- Clients, age four and older, with moderate to severe, unresolvable daily urinary and/or bowel incontinence. The client's incontinence must be medically recognized by the appropriate clinician as being unresolvable. Interventions and strategies may include but are not limited to:
  - Physician/specialist assessment: Clients should have an incontinence condition not amenable to improvement by surgery or application of any device, or be unfit for such a procedure. They must be assessed and certified as such by a specialist continence practitioner (e.g., urologist, gynecologist, geriatrician, gastroenterologist, proctologist, pediatrician, nurse continence advisor or nurse practitioner).
  - Prescriptions/letters from general practitioners without diagnosis and indication of completion of further investigation of the incontinence do not adequately verify the client as experiencing “unresolvable incontinence” and will not be accepted by AADL.

- Modification and conservative strategies must be tried for a minimum of three months and are not limited to: bladder training, pelvic muscle exercises (with or without biofeedback), diet and exercise, weight loss and ensuring appropriate and timely fluid intake. Where appropriate, medications for urinary incontinence should also have been tried, and failed to significantly improve the client's incontinence.
- Clients who choose not to follow medical advice to address incontinence issues will not be eligible for funding for incontinence products through AADL.
- Authorizers are required to assess a client when product/quantity changes are requested prior to adjusting quantities and/or products.
- Children who are projected to achieve continence past age four are required to meet criteria following point 1 prior to submission of an AADL authorization.
- Individuals experiencing moderate to severe incontinence with a diagnosed congenital anomaly, or physiological abnormalities, including lack of bladder innervation that prevents the ability to achieve continence are exempt from the requirements in first main bullet above.
  - Adult clients experiencing moderate to severe incontinence with diagnosed dementia or any cognitive impairment for whom it has been determined by the appropriate medical professional that interventions and strategies would be ineffective or inappropriate are exempt from the requirements outlined in the first main bullet above.
- Clients experiencing moderate to severe incontinence with an end of life diagnosis (life expectancy of no longer than six months) will be authorized for a period of six months and are exempt from the interventions in the main bullet above.

### **Exclusions**

AADL does not provide funding for diapers or catheters and their accessories for:

- menstruation
- pregnancy-induced incontinence or incontinence existing and/or lasting less than six months
- wound drainage
- bowel routines
- enemas
- active treatment and irrigation, or
- for clients who only experience night time incontinence

### **Ostomy supplies**

Funding for ostomy supplies may be provided for clients:

- with a chronic functioning colostomy, urostomy or ileostomy, and
- who have a permanent ostomy and are not expected to have a reversal within six months of the initial ostomy surgery
- who are pediatric clients and clients with an esophagectomy, cecostomy or fistula. Note: These clients must be assessed and authorized by a registered nurse who is a Nurse Specialized in Wound, Ostomy and Continence

### **Exclusions**

AADL does not provide funding for ostomy supplies for: wound care, enteral feedings, drainage tubes, and enema or for client with temporary ostomies (less than six months).

### **Injection supplies**

Funding for injection supplies may be provided for clients who:

- cannot tolerate oral medication
- require the medication on a daily basis to relieve pain or symptoms caused by a chronic or terminal condition

The medication requires a prescription from a physician or nurse practitioner and must be pre-filled by an approved AADL vendor.

As of June 1, 2021, the government-sponsored Palliative Coverage program covers the costs associated with pre-filling syringes for palliative clients.

### **Exclusions**

Mixing or measuring medications, irrigation, trachea/central line care, insulin administration, blood withdrawal/transfusion and intravenous use.

## Procedure

### Clients:

- Confirm eligibility with authorizer.
- Sign Client Consent form.

### Authorizers:

- Confirm client meets AADL eligibility requirements.
- Confirm client's benefit consumption limit.
- Refer to Alberta Aids to Daily Living Approved Product List M – Medical-Surgical Supplies to determine quantity limits for each benefit at <https://open.alberta.ca/publications/aadl-program-manual-m>
- Refer to the Patient Inquiry screen on the Alberta Blue Cross online health portal and check product consumption.
- Complete authorization on the online health portal with any relevant documentation, including the Client Consent form.
- Inform clients of their eligibility status.

### Vendors:

- Check clients' previous benefit consumption:
- Refer to Alberta Aids to Daily Living Approved Product List M – Medical-Surgical Supplies to confirm quantity limits for each benefit at <https://open.alberta.ca/publications/aadl-program-manual-m>
- Refer to the Patient Inquiry screen on the Alberta Blue Cross online health portal, review clients' benefit consumption history and confirm they are eligible for the benefit.
- Refer to Policy M – 08 Quantity and Frequency Limits for clients who are over the quantity/frequency limit.
- Vendors must only invoice for a two month supply of products at one time, and only invoice for up to the amount that the client has requested up to the maximum quantity that the client is authorized for. See Policy M – 07 Providing Medical-Surgical Benefits for details.

### Alberta Blue Cross:

- Responds to telephone or email requests for information on medical/surgical benefits eligibility, and provides reference to the AADL website for further information at: <https://open.alberta.ca/publications/aadl-program-manual-m>
- Adjudicates and audits authorizations submitted through the online health portal for completeness and accuracy.



# Policy M – 03

## Authorizer Qualifications

### Policy Statement

AADL accepts authorizer applications from registered nurses, occupational therapists and physiotherapists who meet the general criteria set out in Policy GN – 03 Application to be an Authorizer in AADL Program Manual Section GN – General Policies and Procedures at <https://open.alberta.ca/publications/aadl-program-manual-gn>

Incontinence supplies, including briefs and diapers, are considered part of the primary product range for registered nurses. AADL accepts requests from occupational therapists or physiotherapists to add incontinence supplies to their approved product ranges once they are approved as AADL authorizers. Occupational therapist and physiotherapist authorizers must review AADL Training module 2.3 – Incontinence Supplies online modules and complete the appropriate application(s) for additional product ranges prior to authorizing incontinence supplies.

AADL accepts prescriptions from authorizers who are nurse practitioners with the relevant specialty.

Only authorizers who have the additional qualification of Nurse Specialized in Wound Ostomy and Continence may authorize ostomy benefits in the following situations:

- clients with a fistula, esophagectomy or high output ostomy
- pediatric ostomy supplies

### Procedure

#### AADL Authorizer Applicants:

- Confirm eligibility. Refer to Policy GN – 03 Application to be an Authorizer for general eligibility criteria found on-line at <https://open.alberta.ca/publications/aadl-program-manual-gn>
- Complete the Authorizer Application form at: <https://formsmgmt.gov.ab.ca/Public/AADL2218.xdp>
  - For occupational therapists and physiotherapists complete appropriate application form for secondary product ranges available at <https://www.alberta.ca/aadl-authorizer-information-and-training.aspx>
  - Complete appropriate on-line module available at <https://www.alberta.ca/aadl-authorizer-information-and-training.aspx>
- Forward completed application with supporting documentation to AADL.

#### AADL:

- Provides authorizer on-line pre-requisite training module.
- Provides in-person or virtual training for primary product ranges.
- Advises Alberta Blue Cross when the authorizer has completed the training requirement and has been provided an authorizer number so they can be registered on the online health portal as a provider.
- Monitors authorizer activities and determines compliance with policies and procedures.

#### Alberta Blue Cross:

- Registers authorizers on the online health portal as providers.

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## Policy M – 04

### Vendor and Trained Provider Qualifications

#### Policy Statement

AADL-approved vendors for medical-surgical supplies must meet the following criteria:

- Meet AADL's general vendor criteria as outlined in AADL Program Manual Section GN – General Policies and Procedures.
- Adhere to benchmark pricing as outlined in Alberta Aids to Daily Living Approved Product List M – Medical-Surgical Supplies.
- Maintain a minimum of one staff member who is employed full-time and has attended product knowledge and/or educational sessions from each AADL-approved manufacturer brand of products that the vendor is selling.
- Ensure product knowledge/education is updated every three years. Vendors must keep proof of this on file and provide to AADL upon request.
- Ensure staff are educated on AADL policies and procedures as stated in the most current AADL Program Manual Section GN – General Policies and Procedures, Program Manual Section M – Medical-Surgical Benefits and Alberta Aids to Daily Living Approved Product List M – Medical-Surgical Supplies.
- Ensure staff have the necessary expertise to provide AADL benefits and associated invoicing and business processes.

AADL may suspend product ranges from vendors whose employees do not have active certification.

Approved medical-surgical supply manufacturers are listed in Alberta Aids to Daily Living Approved Product List M – Medical-Surgical Supplies.

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## Policy M – 05

### Assessment for Medical-Surgical Benefits

#### Policy Statement

The clinical assessment is the first step in the process of obtaining medical-surgical benefits.

The assessment determines eligibility, the benefit(s) required to meet the client's basic needs and the appropriate quantities.

Assessments for medical-surgical benefits must be completed and documented by a health-care professional with the required competence and regulatory license to practice in Alberta. Assessment results must be documented on the client's file and may be audited by AADL/Alberta Blue Cross.

When authorizing incontinence products, authorizers are required to complete and sign the Assessment Summary for Incontinence Products and keep on the client's file.

Assessments for ostomy benefits must be completed by a Nurse Specialized in Wound Ostomy and Continence in the following situations:

- clients with a fistula, esophagectomy or high output ostomy
- clients requiring an ostomy hernia belt or irrigation supplies

Reassessments are required when the authorization expires to confirm ongoing eligibility and ensure the client is using the benefits.

#### Procedure

##### Clients:

- Fully participate in assessment.
- Ensure understanding and engage in strategies recommended.
- Sign the Client Consent form

##### Authorizers:

- Assess client or review assessment if authorizer is not the assessor.
- Implement treatment strategies (clients experiencing incontinence) prior to final assessment.
- Determine benefit and quantity needed based on the client's clinical assessment results.
- Refer to the patient inquiry screen on the Alberta Blue Cross online health portal and check product consumption.
- Complete authorization on the online health portal and submit with any required documentation, including the Client Consent form.

##### Vendors:

- Refer client to authorizer if client requires assessment.

##### AADL:

- Provides direction to authorizers regarding eligibility criteria as it relates to the assessment as needed.

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## Policy M – 06

### Authorization Process

#### Policy Statement

Medical-surgical benefit authorizations includes the assessment and the submission of a valid authorization on the Alberta Blue Cross online health portal.

Authorizers must adhere to the general policies and procedures for authorizing AADL benefits.

Authorizations for incontinence supplies, including catheters and ostomy supplies, stay in effect for up to two years. Clients who have low product use may be subject to a complete reassessment, which may include the completion and review of a bladder/bowel diary, a review of fluid ingestion and a review of medical history by an AADL authorizer.

Clients with a palliative diagnosis are authorized for a maximum period of six months for all medical-surgical benefits.

Expiry dates for authorizations cannot be extended. If a re-assessment is required, authorizers need to enter a new authorization in the Alberta Blue Cross online health portal. If the authorization is active and a change is required, the active authorization must be terminated and a new one entered.

#### Procedure

##### Authorizers:

- Confirm client eligibility for benefit(s). Refer to Policy M – 02 Eligibility Criteria.
- Assess client or review assessment if authorizer is not the assessor. See Policy M – 05 Assessment for Medical Surgical Benefits.
- Refer to the Patient Inquiry screen on the Alberta Blue Cross online health portal and check product consumption.
- Complete authorization on the online health portal and submit with required documentation.
  - If there is a current active authorization on file and client has a change in their product needs, terminate the existing authorization and enter a new one.

##### Clients:

- Fully participate in benefit determination.
- Sign the Client Consent form.
- Inform vendors that they are part of the AADL program prior to purchasing medical-surgical supplies.

##### Vendors:

- Refer to the patient inquiry screen on the Alberta Blue Cross online health portal and check product consumption.
  - Vendors must not dispense product to clients prior to having access to the authorization on the Alberta Blue Cross online health portal.
- Refer client to authorizer if there are issues related to authorization.
- Submit claims on the same day as products are dispensed to ensure client cost-share status is accurate.

##### Alberta Blue Cross:

- Processes and audits authorizations for completeness and accuracy.

## Policy M – 07

### Providing Medical-Surgical Benefits

#### Policy Statement

The provision of medical-surgical benefits includes client education, providing the product, documenting, client billing and claims and advising clients of pending expirations.

AADL vendors must have an agreement with AADL and Alberta Blue Cross and meet all of the criteria outlined in M – 04 Vendor and Trained Provider Qualifications to provide medical-surgical benefits to AADL clients.

Products must meet the generic description and standards specified in Alberta Aids to Daily Living Approved Product List M – Medical-Surgical Supplies, including meeting minimal absorbency criteria for diapers and briefs.

Requests for vendors to provide a specific brand of product must be clinically supported and documented on the authorization.

Vendors must only provide the quantity of consumable products allowed within the frequency limit (e.g., 70 catheters for a two-month period) unless otherwise authorized.

Vendors must not claim for quantities over the AADL-authorized two-month quantity and frequency limit.

Vendors must not implement automatic deliveries. See AADL Program Manual Section GN – General Policies and Procedures GN – 11 Vendor/Specialty Supplier Section for information regarding vendor accountability.

Requests for quantities to be provided in advance of the next two-month period require prior approval from AADL. See Policy M – 10 Requests for Advance Quantities of Medical Surgical Supplies. Vendors are not permitted to ship products to AADL clients outside of Alberta.

#### Procedure

##### Vendors:

- Check for authorization on the Alberta Blue Cross online health portal and confirm eligibility by referring to client's consumption history.
- Collect cost-share and any upgrade costs on the day the products are provided and submit the claim on the online health portal.
- Educate client on product.
- Only provide and claim for medical-surgical products that are listed in Alberta Aids to Daily Living Approved Product List M – Medical-Surgical Supplies.
- Provide benefits within the quantity and frequency limits.

##### Clients:

- Pay cost-share or upgrade as needed.

##### Alberta Blue Cross:

- Adjudicates and pays claims.
- Audits charges on claims submitted by vendors.

## Policy M – 08

### Quantity and Frequency Limits

#### Policy Statement

This quantity and frequency limits process only pertains to clients who experience a condition change from that of the original assessment.

AADL sets bi-monthly and annual limits on the number of medical-surgical benefits funded per eligible client based on current best practice and expected wear. See Alberta Aids to Daily Living Approved Product List M – Medical-Surgical Supplies for specific limits at: <https://open.alberta.ca/publications/aadl-program-manual-m>

Two-month quantity and frequency limits always follow a two month pattern as follows:

- January/February
- March/April
- May/June
- July/August
- September/October
- November/December

AADL medical-surgical benefit authorizers must submit a quantity and frequency review request through the Alberta Blue Cross online health portal for benefit requests over the quantity or frequency outlined in the approved product list. Refer to Policy GN – 28 Quantity and Frequency Review Process in the General AADL Policy and Procedure Manual at: <https://open.alberta.ca/publications/aadl-program-manual-gn>.

Only Nurses Specialized in Wound Ostomy and Continence and nurse continence advisors may submit authorizations on the online health portal with prior approval from Alberta Blue Cross for benefit quantities above quantity limitations, up to double the quantity listed in Alberta Aids to Daily Living Approved Product List M – Medical-Surgical Supplies, without the submission of a quantity and frequency review request.

Increased quantity limits approved through a quantity and frequency review request are effective for the period of time the corresponding authorization is valid and are not automatically extended.

#### Procedure

##### Authorizers:

- Explain policy and process to client, ensuring client and/or caregiver understands.
- Submit quantity and frequency review request authorization on the Alberta Blue Cross online health portal and include the following documentation:
  - Quantity and Frequency Review Request form
  - Client Consent form
  - other supporting documentation
- Nurses Specialized in Wound Ostomy and Continence and nurse continence advisors can contact the Alberta Blue Cross provider contact center to request products over quantity without completing the quantity and frequency review request authorization.

##### Clients:

- Consult with AADL authorizer when authorization for products is close to expiration.
- Seek alternate funding for products needs that fall outside the quantity and frequency limits.

**Alberta Blue Cross:**

- Receives and log quantity and frequency review requests.
- Forwards quantity and frequency review requests to AADL for adjudication.
- Updates quantity and frequency review status on the online health portal which can then be viewed on the provider portal.
- Provides notification to the authorizer when a quantity and frequency review decision is made.

**AADL:**

- Receives and reviews the quantity and frequency review via the Alberta Blue Cross online health portal.
- Adjudicates and notifies Alberta Blue Cross of decision.

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## Policy M – 09

### Request for Advance Quantities of Medical-Surgical Supplies

#### Policy Statement

AADL may provide funding for up to six months quantities of catheters or ostomy supplies for client traveling out of the province.

Client traveling out of province must submit a Request for Advance Quantities of Medical Surgical Supplies form to AADL at least one month prior to departure. AADL cannot guarantee the processing of the forms when the form has been sent in under the one-month time frame.

Once a request is approved, AADL will inform Alberta Blue Cross to make adjustments to the client's file on the Alberta blue Cross online health portal. Vendors may confirm the client has been approved for advanced quantities by checking the client's authorization history report on the online health portal.

Clients must pick up the advance quantity prior to leaving the province.

Vendors may not deliver benefits to an out-of-province address.

Requests for Advance Quantities of Medical Surgical Supplies forms are accepted from July 1 to May 31. Requests are not accepted during the month of June.

Clients must maintain their Alberta Health Care Insurance Plan eligibility for the entire period.

#### Procedure

##### Clients:

- Complete Request for Advance Quantities of Medical Surgical Supplies form and submit to AADL one month prior to travelling out of the province. <https://www.alberta.ca/assets/documents/aadl/aadl-request-advanced-supplies.pdf>.

##### Vendors:

- Provide client with advance quantities of medical-surgical supplies according to the approved quantity on client's authorization history report on the Alberta Blue Cross online health portal.
  - Vendors are not to provide clients with advance quantities unless the request for advance quantities has been approved by AADL and a note has been entered on the Alberta Blue Cross online health portal on the authorization.
- Vendors can submit a claim for the additional approved amount for a period of 30 days from the AADL approval date; this is based on the date of service of the claim and not the submission date of the claim. For example if the advanced quantity request was approved on June 1 of that year, the vendor has until June 30th to submit the claim for the amount of product they provided. The amount will be allowed to exceed the normal allotment to match the advanced quantity request for 30 days only. The vendor must note in their records which months they have claimed for to ensure duplicate claims are not submitted.

##### AADL:

- Receives Request for Advance Quantities of Medical-Surgical Supplies forms from clients.
- Processes approved requests.
- Notify Alberta Blue Cross Provider Contact Center by email and provide the following:
  - The reference number of existing authorizations
  - The number of months' supply which has been approved.
  - Any products in the authorization that are being excluded from the approval.



### **Alberta Blue Cross**

- Creates a note on the online health portal to advise vendors and authorizers of the advanced quantities approval for the time specified.

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## Policy M – 10

### Patient Claim Statement

#### Policy Statement

Medical-surgical benefits vendors must provide every client with a patient claim statement for each benefit invoiced to the AADL program. The statement can be printed from the Alberta Blue Cross online health portal, and must include general information such as statement details, Alberta Blue Cross contact information and client data.

The patient claim statement is comprised of three sections: statement information, claim summary and claim details.

The claim summary displays the overall breakdown of how much each client is responsible for against the total claimed amount for all claims submitted:

- Total amount claimed – The sum of claimed amounts for all claims submitted.
- AADL will pay – The total amount that AADL will cover for all claims submitted.
- Client will pay – The total amount the client is responsible to pay for all claims submitted. This amount is the sum of any cost-share amount the client owes and upgrade charges that are not covered by AADL.

Clients must be provided with a copy of their patient claim statement.

#### Procedure

##### Vendors:

- Provide clients with a patient claim statement for AADL benefits. The patient claim statement must be printed from the Alberta Blue Cross online health portal.
- For cost-share clients, identify the AADL contribution and the client's cost-share contribution for each benefit.
- For cost-share exempt clients, identify AADL's contribution for each benefit.
- Retain a copy of the patient claim statement on the client's file.

##### Alberta Blue Cross:

- Provide vendors with a patient claim statement through the online health portal as required.

# Appendix 1

## Incontinence Prescreening Tool

- **ALL** clients **must** experience **\*moderate to severe incontinence**. (*All = palliative diagnosis, clients with congenital or physiological anomalies, clients with dementia or cognitive impairment, or clients with bladder or bowel dysfunction*)
- individuals diagnosed with congenital anomalies or physiological abnormalities, dementia or cognitive impairment where determined by appropriate medical professional that **interventions/strategies** would be **ineffective or inappropriate** are exempt from requirements.
- **Interventions & Strategies** include bladder training, pelvic muscle exercises, diet and exercise, surgery or application of device, weight loss and ensuring appropriate and timely fluid intake, daily intake and output diary, medications for incontinence. (*Clients with life expectancy of no longer than six months are exempt from interventions*)
- **Intake review and implementation of toileting strategies** must be considered for every client, **including palliative clients**. If intake cannot be measured, a review of what client is offered to drink during the day must be considered
- Must be certified by a specialist that condition will not improve (**Rx/letters from GP without diagnosis or completion of further investigation will not be accepted by AADL**)
- AADL defines **\*moderate to severe incontinence** as a client requiring a **medical grade product** a **minimum of three times per 24 hour period**. (Medical grade=600 ml absorbency used to 75% capacity)
- **Exclusions:** AADL does not provide funding for diapers, liners, catheters and their accessories for menstruation, pregnancy induced incontinence or incontinence existing and/or lasting less than six months, wound drainage, bowel routines, enemas, active treatment and irrigation, or for clients who only experience nighttime incontinence
- [www.alberta.ca/alberta-aids-to-daily-living.aspx](http://www.alberta.ca/alberta-aids-to-daily-living.aspx)

