



# Manual wheelchair benefits

Alberta Aids to Daily Living  
Program Manual Section WM



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# Contents

<b>Policy WM – 01</b> .....	<b>5</b>
Manual Wheelchair Benefit Description.....	5
• Policy Statement	5
<b>Policy WM – 02</b> .....	<b>7</b>
Eligibility Criteria.....	7
• Policy Statement	7
• Table 1	8
• Table 2	8
• Procedure	8
<b>Policy WM – 03</b> .....	<b>10</b>
Authorizer Qualifications .....	10
• Policy Statement	10
• Procedure	10
<b>Policy WM – 04</b> .....	<b>11</b>
Authorization Process .....	11
• Policy Statement	11
• Procedure	11
<b>Figure 1</b> .....	<b>13</b>
Category A, Heavy Duty and Tilt-in-Space Manual Wheelchair Process .....	13
<b>Figure 2</b> .....	<b>14</b>
Recycle Equipment Process .....	14
<b>Figure 3</b> .....	<b>15</b>
Category B, C and Grant Manual Wheelchair Process .....	15
<b>Policy WM – 05</b> .....	<b>16</b>
Providing Manual Wheelchair Benefits.....	16
• Policy Statement	16
• Procedure	16
<b>Policy WM – 06</b> .....	<b>18</b>
Quantity and Frequency Limits.....	18
• Policy Statement	18
• Table 3	18
• Procedure	20

<b>Policy WM – 07 .....</b>	<b>21</b>
Ownership and Responsibilities: Repairs and Returning AADL Wheelchairs.....	21
• Policy Statement	21
• Procedure	21
<b>Policy WM – 08 .....</b>	<b>23</b>
Refusal of the Equipment.....	23
• Policy Statement	23
• Procedure	23
<b>Policy WM – 09 .....</b>	<b>24</b>
Internal Transfers.....	24
• Policy Statement	24
<b>Policy WM – 10 .....</b>	<b>25</b>
Patient Claim Statement.....	25
• Policy Statement	25
• Procedure	25
<b>Policy WM – 11 .....</b>	<b>26</b>
Definitions .....	26

# Policy WM – 01

## Manual Wheelchair Benefit Description

### Policy Statement

Alberta Aids to Daily Living (AADL) purchases and provides manual wheelchairs for eligible adults and children.

Wheelchairs are primarily provided from the AADL recycle inventory, which have been previously used and refurbished. If the wheelchair requested is not available from the recycle inventory, AADL purchases the wheelchair new.

All wheelchairs funded by AADL are listed in Alberta Aids to Daily Living Approved Product List W – Wheelchairs: Manual and Power. Products on the approved product list are reviewed regularly through an AADL product evaluation review. Refer to Policy ZN – 03 in AADL Program Manual Section ZN – Recyclable Benefits: New Purchase and Repair for further information on product evaluations.

AADL retains full ownership of all formally recycled wheelchairs. See Policy WM – 07 Ownership and Responsibilities - Repairing and Returning AADL Wheelchairs.

Wheelchair specification sheets are provided on the manufacturer's website for AADL-funded wheelchairs and include available options and pricing funded by AADL. Every effort is made to identify all features a client may opt to pay for.

AADL provides funding for wheelchairs through contracts with AADL-approved wheelchair vendors, which are listed on the AADL – Approved vendors list page on the AADL website.

### Manual wheelchairs

The manual wheelchair benefit type includes authorizations for the purchase of a manual wheelchair and equipment. The following authorization types fall under the benefit type:

- category A manual wheelchair (includes tilt-in-space with back and head rest)
- category B manual wheelchair
- category C manual wheelchair
- grant for manual wheelchair – upgrade or category D
- recycled manual wheelchair (all category A)
- category A high weight/heavy duty manual wheelchair
- category A tilt-in-space (base only) manual wheelchair

Wheelchairs are designated as “standard,” “standard plus” or “upgrade” wheelchairs according to the amount of funding provided by AADL and costs shared with the client. See Policy WM – 11 Definitions for designation descriptions.

### Upgrade/Grant wheelchairs

Category A upgrade, category B upgrade and category D upgrade wheelchairs are distinct from other wheelchairs as they are funded through an AADL grant. Grants are subject to cost-share and the client pays all costs above the grant amount.

Grant amounts are dependent on the client's eligibility and are listed in the approved products list under each category. See Policy WM – 02 Eligibility Criteria for further information on eligibility.

Clients choosing grant funding are considered the owner of the wheelchair, responsible for all repairs and maintenance. Grant funds are paid directly to the vendor once the wheelchair has been supplied to the client (service date). Wheelchair grants have a frequency limit of one in five years, which is strictly enforced (See Policy WM – 06 Quantity and Frequency Limits).

## **Wheelchair Options, Accessories, and Seating Benefits**

Additional funding for the following options is available on manual wheelchairs:

- heavy duty packages
- one arm drives
- elevating leg rests
- angle-adjustable foot plates
- vent trays
- oxygen holders

These options have separate codes and are found in Alberta Aids to Daily Living Approved Product List W – Wheelchairs: Manual and Power.

Information related to basic wheelchair accessories such as cushions, special backs and drop seats and specialized seating benefits authorized through seating teams/clinics are found in AADL Program Manual Section X – Seating and Wheelchair Accessory Benefits.

Information on formal recycle, repairs, internal transfers and parts changes is found in AADL Program Manual Section ZN – Recyclable Benefits: New Purchase and Repair and AADL Program Manual Section ZR – Recyclable Benefits: Recycle Vendor Service.

## **Exclusion List**

### **Manual seating devices and features not funded by AADL:**

- 3" roller blades on adult chair frames
- aluminum caster hubs when composite is available
- backpacks
- cosmetic accessories
- crutch/cane holders
- fixed-height arm rests on wheelchairs
- flat-free inserts in pneumatic tires when urethane tires are available
- Geri-chairs
- high performance wheels
- monogramming
- multiple choice or custom color options
- nine-spoke composite wheels
- parts or repairs for private-owned or grant wheelchairs
- performance tires
- repairs on any component on a mobility device purchased privately
- seat belts other than approved generic ones
- strollers
- tire pumps
- touch up paint

## Policy WM – 02

### Eligibility Criteria

#### Policy Statement

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

A client's eligibility for wheelchair benefits must be determined by an AADL authorizer prior to authorization and confirmed by AADL.

Clients who require a wheelchair for part-time or full-time use are eligible for manual wheelchair benefits.

For category A, including tilt and heavy duty, all clients must be willing to accept a recycled wheelchair if there is one available in the recycle inventory.

Category A clients must be willing to accept a comparable substitute. Category B and C requests will be ordered new unless client requests recycle.

Clients are responsible for the costs related to temporary loans or rental equipment required while waiting for AADL-funded equipment.

Clients are responsible for the cost of repairs to any option chosen that is not funded by AADL.

The adult full time user must be living in a fully accessible environment.

Specific wheelchair models may have additional eligibility or prior approval requirements; these are listed in Alberta Aids to Daily Living Approved Product List W – Wheelchairs: Manual and Power.

Prior approval from the AADL Manager for Mobility and Large Equipment is required for grant wheelchairs.

AADL provides funding for generic parts wherever possible. Clients preferring manufactured parts are financially responsible for the additional cost.

Client weight and condition must be stable for a minimum of three months before any change to wheelchair benefits may be considered.

Clients whose weight exceeds the standard wheelchair maximum weight capacity are eligible for either a heavy duty package on a wheelchair or a heavy duty wheelchair. The weight of oxygen tanks/ventilators should be added when computing the maximum weight capacity required. See Manual Wheelchairs: Heavy Duty in Alberta Aids to Daily Living Approved Product List W – Wheelchairs: Manual and Power for information on which wheelchairs can accommodate a heavy duty package and which are designated heavy duty.

Clients who require other types of mobility devices, such as a cane or walker, to transfer are eligible for a manual wheelchair. Those who are able to use a walker for short distances (e.g., within their home) are considered part-time users and are eligible for a category A only.

AADL will provide a category A back-up manual wheelchair from recycle to clients that have been provided a power wheelchair. A back-up wheelchair is for use when the power wheelchair is not working or has to be left at the vendors for repairs or maintenance. It is not intended for part-time use.

AADL will provide a category A manual wheelchair to clients that have been provided with prosthetics. AADL will not fund Category B, C or D manual wheelchair for those who have lower limb prosthetic.

Client eligibility for each category of manual wheelchair is based on both the client's frequency of wheelchair usage and the degree of independence of use. See Table 1: Manual Wheelchair Category Specific Eligibility Criteria on the following page.

**Table 1****TABLE 1: MANUAL WHEELCHAIR CATEGORY SPECIFIC ELIGIBILITY CRITERIA**

Eligibility criteria	Category A	Category B	Category C	Category D (prior approval)
Ability to propel manual wheelchair	Dependent or independent	Independent	Independent	Independent
Ability to ambulate with/without a cane(s), walker, crutches or with lower limb prosthetic*	Has ability; however, requires wheelchair for safety & distance	No ability. May use cane/walker for transfer purposes	No ability. May use cane or walker for transfer purposes	No ability. May use cane or walker for transfer purposes
Minimum activity level	Part-time or full-time use	Full-time indoor and outdoor use. Active in community	Full-time indoor use and frequent outdoor use	Full-time indoor use and frequent outdoor use.
	Indoor and/or outdoor use		Active four out of seven days in community	Active in community
High risk of upper extremity injury	May or may not be at risk.	Not a significant concern.	Evidence of high risk.	Evidence of high risk.
Other	Part-time user	Minimum six consecutive hours sitting tolerance	Adults only	As per category C
	Not eligible for one arm drive option		Minimum six consecutive hours sitting tolerance	Non-progressive condition only

\*Benefits that provide a duplicate function are not funded by AADL.

**Table 2****TABLE 2: OPTION SPECIFIC ELIGIBILITY CRITERIA**

Option/Feature	Criteria
Recline	Difficulty breathing. Self-catheterizes. Feeding impairment, need to extend trunk during feeding
One-arm drive	Full-time user
Tilt option	Limited to those clients who are unable to be seated in an upright position. Seating needs cannot be addressed by regular seating benefits and wheelchair accessories (see AADL Program Manual Section X)
Angle adjustable footrests	Client must have limited range of motion in ankles

## Procedure

### Authorizers:

- Confirm client meets AADL eligibility requirements.
- Confirm client's previous benefit consumption.
- Quantity limits are listed in Alberta Aids to Daily Living Approved Product List W – Wheelchairs: Manual and Power.
- Client product consumption can be found on the patient inquiry screen on the Alberta Blue Cross online health portal.
- Refer to Policy WM – 06 Quantity and Frequency Limits if client is over quantity or frequency limit.
- Inform clients of their eligibility status.



**Clients:**

- Confirm eligibility with authorizer.
- Sign Client Consent form for approval of use of personal and health information.

**Alberta Blue Cross:**

- Responds to telephone or email requests for information on wheelchair benefits eligibility and provides reference to the AADL website for further information.

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## Policy WM – 03

### Authorizer Qualifications

#### Policy Statement

An occupational therapist or physical therapist who is an approved AADL authorizer may apply to add wheelchairs to their product range as a secondary product range.

Authorizers must meet the following criteria to apply to be an AADL wheelchair authorizer:

- be familiar with mobility and seating assessment protocols including:
  - medical, social and functional history
  - Movement Assessment Tool (MAT) assessment
  - client-centered goal setting
- be familiar with current, evidence-based practice for seating assessment and interventions as demonstrated by ongoing participation in annual continuing competency activities related to seating assessment and recommendations
- have sufficient knowledge on basic wheelchair components and options such that any option chosen is based on and explainable using clinical rationale
- completed the Seating and Wheelchair Accessory Benefits Manual Wheelchair and Seating Needs (Level A) Authorizer Application form for wheelchair benefits
- completed AADL Training Module 2.6 – Manual Wheelchair Benefits online

Authorizers must be competent in wheelchair maintenance and adjustment prior to performing this type of work on AADL-funded wheelchairs.

AADL is under no obligation to grant authorizer status and has the discretion to terminate or suspend some or all product ranges assigned to an authorizer.

Authorizers are responsible and accountable for the assessment used to determine the benefit authorized.

#### Procedure

##### Authorizer Applicants:

- Must already be an AADL authorizer. See AADL Program Manual Section GN. Complete the primary Authorizer Application form at: <https://www.alberta.ca/assets/documents/aadl/aadl-authorizer-application.pdf>
- Complete the Seating and Wheelchair Accessory Benefits Manual Wheelchair and Seating Needs (Level A) Authorizer Application form available at: <https://www.alberta.ca/assets/documents/aadl/aadl-authorizer-wheelchair-seating-application.pdf>
- Forward completed application with supporting documentation to AADL.

##### AADL:

- Provides authorizer training for new authorizers.
- Reviews application for secondary product range and approves authorizers who have completed all requirements and meet eligibility criteria.
- Adds product range to the authorizer's product range list.
- Monitors authorizer activities and determine compliance with policies and procedures.

# Policy WM – 04

## Authorization Process

### Policy Statement

The authorization process includes a comprehensive client assessment, documentation, completing recommended benefit and submission to Alberta Blue Cross.

Authorizations remain active for the duration of the frequency period for that product.

Assessments for wheelchairs funded by AADL must be completed and documented by the wheelchair authorizer on the wheelchair assessment tool, AADL Seating Assessment form or comparable assessment. The authorizer maintains a copy of the wheelchair assessment tool or Seating Assessment form and must provide a copy, upon request from AADL, for audit purposes.

When providing a wheelchair to a client, the recycle inventory is searched first using the Generic Specifications form. See Policy ZR – 04 Recycle-out in AADL Program Manual Section ZR – Recyclable Benefits: Recycle Vendor Service for the procedure.

If equipment is not available through recycle, the authorizer may proceed with ordering new from the client's preferred vendor.

Prior approval from the Manager, Mobility and Large Equipment are required for category A, B or D grant manual wheelchair authorizations.

### Procedure

#### Authorizers:

- Assess client in the home environment. Consider the ability to transport wheelchair in vehicle.
- Confirm client eligibility, including residence and past benefit consumption. Refer to Policy WM – 02 Manual Wheelchair Eligibility Criteria and the patient inquiry screen on the Alberta Blue Cross online health portal to check product consumption.
- Document assessment details on the AADL Manual Wheelchair Assessment form, or comparable form, with clinical rationale to support the provision of the wheelchair's specialty features.
- Explain client eligibility to the client and clearly indicate which wheelchair(s) the client is eligible to receive. Refer to GN – 08 Explaining Policies and Procedures to Clients in AADL Program Manual Section GN – General Policies and Procedures for procedure.
- Explain to client that the wheelchair will come through recycle first. If not available there, client will be provided choice of vendor according to the wheelchair approved vendor list.
- Complete and submit the Generic Specification form to the recycle vendor to search the recycle inventory. See ZR – 04 Recycle-out in AADL Program Manual Section ZR – Recyclable Benefits: Recycle Vendor Service for recycle-out process.
- Obtain client signature on the Client Consent form.
- Complete the Manual Wheelchair Benefits Eligibility Summary form for category A, category B, category C, tilt, heavy duty or grant benefits.
- Submit authorization on the Alberta Blue Cross online health portal for either a recycle or new wheelchair. Upload corresponding eligibility summary form, Client Consent form and confirmation from recycle vendor that requested equipment is not available through recycle (if applicable).
- Determine client costs and ensure the client understands and agrees to any costs they are responsible for.
  - Refer to the specific wheelchair specification sheet and approved products list to determine additional/upgrade costs to the client. Indicate client has agreed to options not funded by AADL on the specification sheet.

- Address need for prior approval if required. Determine clinical justification. Provide sufficient, detailed additional information related to prior approval requests directly on the authorization to assist the adjudicating of prior approvals. Wait for a response from Alberta Blue Cross on prior approval requests.
- Advise client of cost-share amount.
- Notify vendor of authorization on the online health portal and order equipment.

#### **Clients:**

- Fully participate in assessment.
- Understand and be well-informed about wheelchair choice and cost implications. AADL provides wheelchairs through recycle first.
- Arrange for funding to include all costs exceeding the AADL contributions and, when applicable, the cost-share portion to be paid directly to the vendor prior to the wheelchair order being processed by the vendor.
- Sign Client Consent form to allow use of personal and health information.

#### **Recycle Vendor:**

- Receives generic specification forms from authorizers.
- Searches database for match.
- Provides written confirmation for match or no match.
- If match available, receives authorization on the Alberta Blue Cross online health portal and confirms with authorizer the cost-share amount.
- Collects cost-share, refurbishes chair and sets it up as per authorizer's request.

#### **Vendors:**

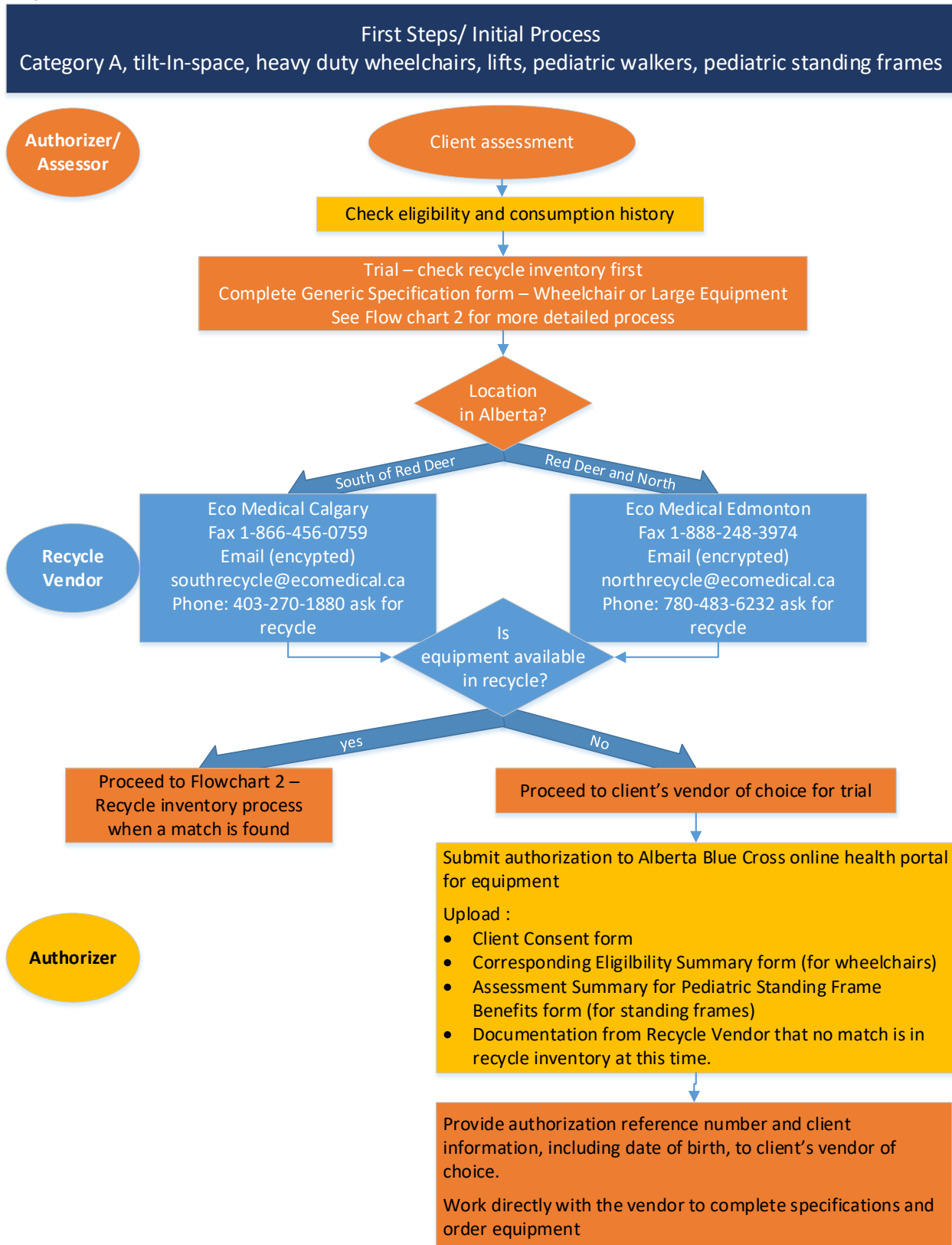
- Receive notice from the authorizer of authorization on the online health portal and provides equipment.
- Provide equipment for trial if requested, and assist authorizer with completing wheelchair specification sheets. Ensure the authorizer understands the purpose of current features of the wheelchair and potential for modifications in the future.

#### **Alberta Blue Cross:**

- Reviews wheelchair authorizations for compliance, completeness and accuracy.
- Reviews authorization for eligibility. Denies authorizations that do not meet eligibility requirements.
- Processes valid authorizations. See Valid Authorization in WM – 11 Definitions.

# Figure 1

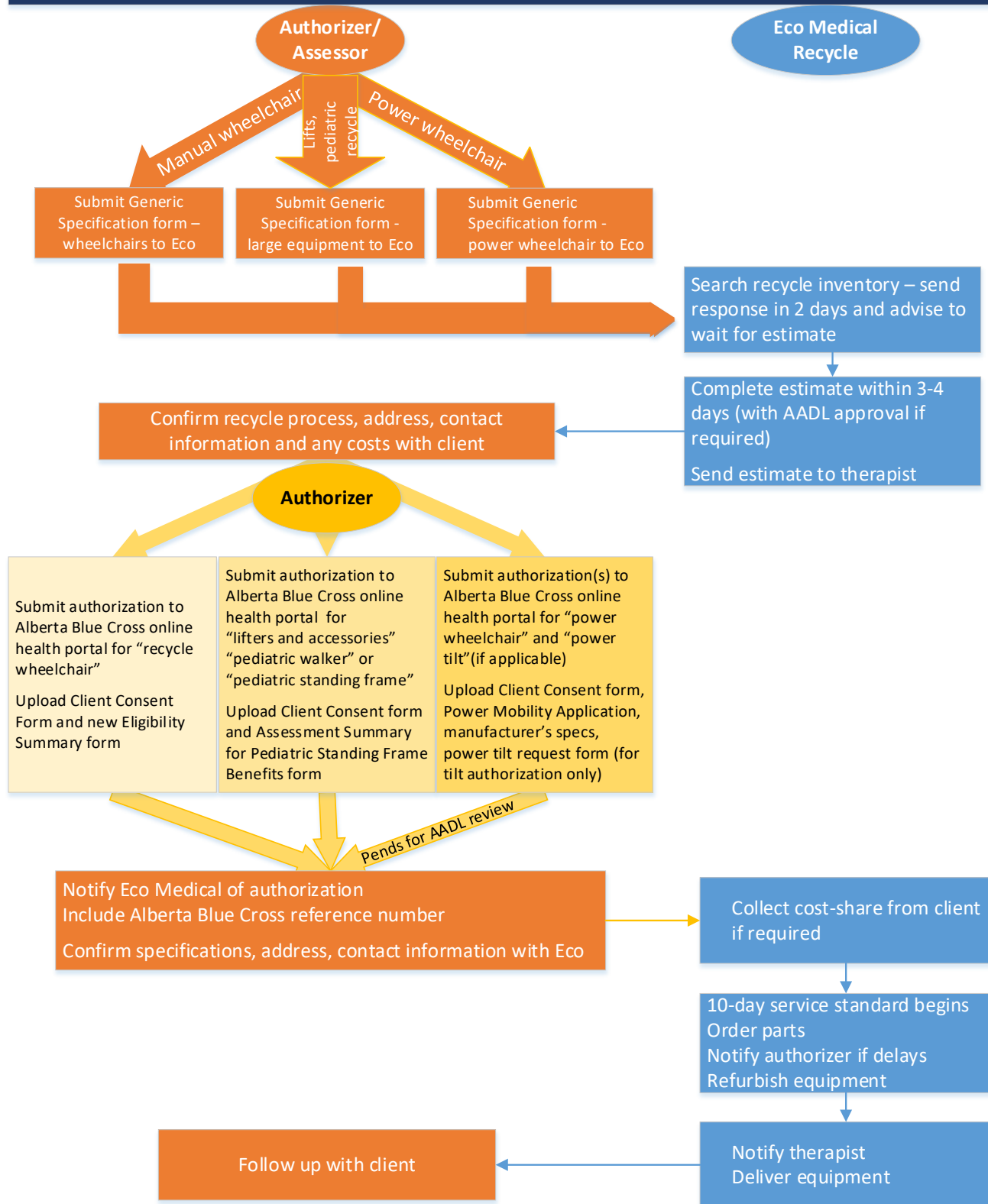
## Category A, Heavy Duty and Tilt-in-Space Manual Wheelchair Process



## Figure 2

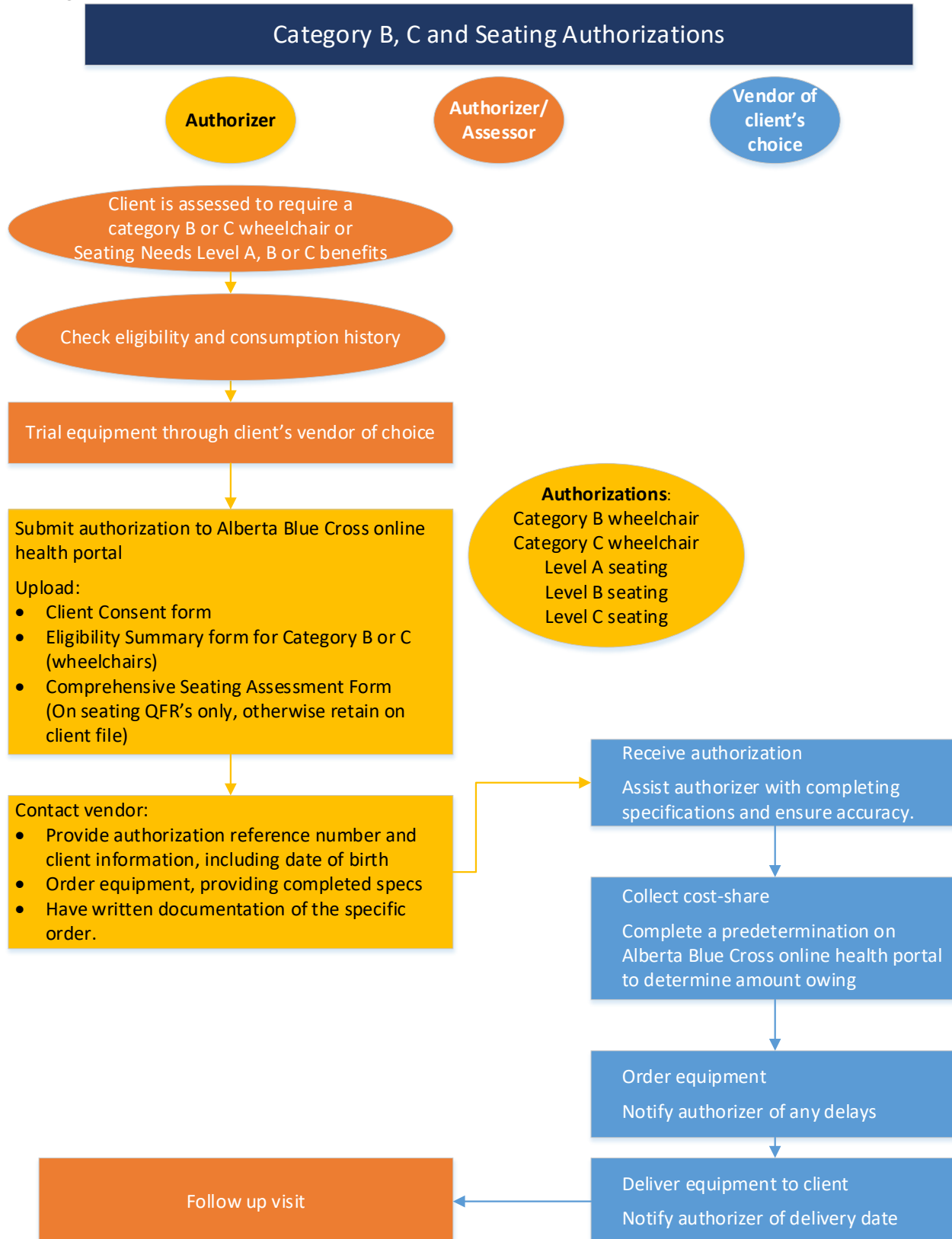
### Recycle Equipment Process

Recycle process when a match is found – Manual wheelchairs, large equipment and power wheelchairs



**Figure 3**

Category B, C and Grant Manual Wheelchair Process



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## Policy WM – 05

### Providing Manual Wheelchair Benefits

#### Policy Statement

AADL-funded wheelchairs are provided through Alberta vendors who have a tendered contract with AADL. Vendors under this contract provide new equipment and repair services. Refer to Policy ZN – 02 in AADL Program Manual Section ZN – Recyclable Benefits: New Purchase and Repair and Policy ZR – 02 in AADL Program Manual Section ZR – Recyclable Benefits: Recycle Vendor Service for further information on vendors of new equipment, repair qualifications and the recycle vendor.

The provision of wheelchair benefits includes the AADL wheelchair vendor order, delivery of the wheelchair, client billing and claims.

AADL provides wheelchairs from the recycle program first. When a recycle wheelchair is not available from recycle, it is ordered new.

AADL wheelchair vendors provide select wheelchairs to AADL clients from Alberta Aids to Daily Living Approved Product List W – Wheelchairs: Manual and Power, authorized by an AADL authorizer.

Approved wheelchair suppliers for are listed on the AADL-approved vendor list found at <https://www.alberta.ca/assets/documents/aadl/aadl-vendors-wheelchair.pdf>.

Wheelchairs provided by the AADL program remain the property of the Government of Alberta until the equipment no longer meets AADL's criteria for recycling and has been released. See Policy WM – 07 Ownership and Responsibilities - Returning/Replacing Wheelchairs.

In the event the client deceases before the wheelchair is delivered to the client, the vendor will stop the delivery and return the equipment to the manufacturer or keep it in vendor stock for future sale.

Custom-made wheelchairs that cannot be stopped or returned to the manufacturer are returned to the recycle vendor for AADL recycle. See Policy WM – 11 Definitions for the definition of custom wheelchair.

#### Procedure

##### Authorizers:

- Ensure wheelchair fits and confirm satisfaction with client. Complete any minor adjustments required. If a recycled chair, work with the recycle vendor to make any adjustments or parts changes within 90 days.
- Address any concerns immediately with the AADL client and vendor.
- Notify AADL if concerns are not resolved.

##### Clients:

- Pay any cost share portion and/or upgrade costs directly to the vendor.
- Participate in final wheelchair fitting and confirm satisfaction.
- Address any concerns immediately with the AADL authorizer and vendor.
- Assume responsibility for the care and maintenance of the wheelchair.
- Accept responsibility for the cost associated with repair and maintenance if the wheelchair is an upgrade.



**Recycle Vendor:**

See AADL Program Manual Section ZR – Recyclable Benefits: Recycle Vendor Services for details on recycle-outs

- Receive notification of authorization for recycle wheelchair on the Alberta Blue Cross online health portal.
- Establish refurbishing costs and notifies authorizer to get final approval to proceed.
- Collect cost-share, refurbishes wheelchair and sets up chair as specified.
- Notify authorizer and deliver wheelchair to client.
- Work with authorizer to make any adjustments.
- Submit claim on the online health portal.

**Vendors:**

- Receive notification of authorization and order for wheelchair benefit from authorizer.
- Obtain written confirmation of approval from client prior to ordering.
- Collect any cost-share portion or deposit and/or upgrade costs from the client prior to ordering the wheelchair.
- Order the wheelchair.
- Affix AADL stickers (“Not for Resale” and “Year”) to wheelchair once at vendors.
- Set up wheelchair according to specifications, provide delivery and fitting of wheelchair or notify therapist that the wheelchair is being delivered.
- Collect remaining cost-share amount based on a pre-determination on the online health portal.
- Address any concerns at time of delivery and advise AADL if concerns cannot be addressed immediately.
- Submit claim to Alberta Blue Cross online health portal for payment for AADL-funded specifications and options. Keep order on file for auditing purposes.

**Alberta Blue Cross:**

- Receives and pays claims from AADL recycle vendor or AADL wheelchair vendors.

**AADL:**

- Processes eligible director appeal letters for cost-share reimbursements received from vendor, client or authorizer. Appeals will be dealt with on individual basis.

# Policy WM – 06

## Quantity and Frequency Limits

### Policy Statement

AADL sets limits on the number of wheelchair benefits funded per eligible client based on basic clinical needs and fiscal accountability.

AADL wheelchairs are provided for long-term use and are expected to last at least five years for the same client. AADL wheelchairs can be modified to meet changing needs.

Category A and B upgrade wheelchair grants and category D wheelchair grants have a frequency limit of one in five years. AADL does not make any parts changes, pay for repairs or allow quantity and frequency reviews for grant chairs.

A maximum of one oxygen holder is funded for eligible clients.

A quantity and frequency review will be considered by AADL in extenuating circumstances when clients have had a substantial unexpected change in clinical need, which cannot be met by modifying their current wheelchair. Refer to Policy ZN – 05 Parts Changes in AADL Program Manual Section ZN – Recyclable Benefits: New Purchase and Repair.

Quantity and frequency review requests must be submitted by an AADL authorizer for wheelchair benefits. Quantity and frequency review requests are submitted on the Alberta Blue Cross online health portal.

Criteria for submitting a quantity and frequency review request for wheelchair benefits is summarized in Table 3: When to Submit a Quantity and Frequency Review Request for Wheelchair Benefits.

**Table 3**

**TABLE 3: WHEN TO SUBMIT A QUANTITY AND FREQUENCY REVIEW REQUEST FOR WHEELCHAIR BENEFITS**

Requests to Replace Manual Wheelchair							
AADL-owned or upgrade wheelchair	Age of wheelchair	Adult or child	Client condition changed	Submit quantity and frequency review request	Submit authorization	AADL deems current wheelchair not cost-effective to repair or reconfigure	Comments/conditions
Upgrade	< 5 yrs.	Adult	Yes	N/A	No	N/A	Not eligible – pursue alternate funds
AADL owned	< 5 yrs.	Adult	Yes	Yes	No	True	Report client condition change on quantity and frequency review.
	1 – 5 yrs.	Adult	Yes – needs tilt	Yes	No	N/A	Write clinical rationale: change in condition and need for tilt.
	5+ yrs.	Adult	No	No	Yes	N/A	Confirm with vendor that AADL agrees current

			Yes	No	Yes		wheelchair not cost effective to repair/reconfigure.
AADL owned	1+ yrs.	Child	Growth >2"	Yes	No	True – not able to or cost-effective to grow	Report client change – growth and that it is not cost-effective or possible to reconfigure current wheelchair.
			Yes – other than growth	Yes	No	True	Confirm with vendor that AADL agrees that current wheelchair not cost-effective to repair.
Upgrade	5+ yrs.	Adult	Yes	No	Yes	True	
Upgrade or AADL owned	> 10 yrs.	Adult	No	No	Yes	Confirmation by AADL not required	

**Requests for Early Parts Change within one year of receiving wheelchair**

AADL owned or upgrade wheelchair	Age of wheelchair	Adult or child	Client condition changed	Submit quantity and frequency review request	Submit authorization	AADL deems current wheelchair not cost-effective to repair or reconfigure	Comments/conditions
AADL owned	<1 yr. Parts change request	Either	Yes	Yes	Not required	Vendor able to reconfigure with parts change.	Confirm with vendor - able to reconfigure with a parts change only, wheelchair not to be replaced.

AADL will only consider quantity and frequency reviews to replace a wheelchair for the following reasons:

- the client has had a major change in medical status and the current wheelchair cannot be modified to meet the client's needs through adjustments or parts changes
- the client's weight has changed, necessitating a wheelchair with a different weight capacity, and the weight has been stable for at least three months
- the client's measurements have changed necessitating a width change of at least 2"
- the client's condition has changed such that a seat to floor height change of at least 2" is necessary
- AADL has determined the client's wheelchair is no longer economical to repair; AADL may consider funding temporary repairs until the wheelchair replacement process can be completed

## Procedure

### Authorizers:

- Refer to Policy GN – 28 Quantity and Frequency Review Process in AADL Program Manual Section GN – General Policy and Procedures at: <https://open.alberta.ca/publications/aadl-program-manual-gn>
- Assess client and determine if wheelchair can be modified or if a replacement is required.
- Refer to Table 3: When to Submit a Quantity and Frequency Review for Manual Wheelchair Benefits.
- Advise clients of quantity and frequency limits and associated costs of replacing a wheelchair.
- Complete the Quantity and Frequency Review Request form found at: <https://www.ab.bluecross.ca/pdfs/AADL-comm-quantity-frequency-review.pdf>
- Obtain client understanding and signature on the form. Advise client of next steps.
- Ensure client signs the Client Consent form.
- Complete quantity and frequency review request authorization on the Alberta Blue Cross online health portal. Authorization will remain pending until a decision is made by the AADL Program Manager.
- If quantity and frequency review request is approved, authorization will be processed by Alberta Blue Cross and they will notify Authorizer that the authorization is ready to view.

### Clients:

- Participate in reassessment.
- Understand and agree to any cost implications prior to signing the Quantity and Frequency Review Request form.

### Vendors:

- Receive requests to evaluate AADL wheelchair for costs to repair or modify.
- Advise authorizer when repairs have been denied by AADL and to proceed with client reassessment. Advise authorizer of age of wheelchair in case a quantity and frequency review is required.

### 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 request status on the online health portal which can then be viewed on the provider portal.
- Sends notification of the decision to the authorizer, and the client if necessary.

### AADL:

- Receives the quantity and frequency review request and supporting documentation from Alberta Blue Cross.
- Adjudicates and provides decision to Alberta Blue Cross.

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## Policy WM – 07

### Ownership and Responsibilities: Repairs and Returning AADL Wheelchairs

#### Policy Statement

AADL retains ownership of manual standard and standard-plus wheelchairs until they are determined as surplus.

Clients are responsible to ensure AADL-funded wheelchairs assigned to them are maintained on a regular basis according to manufacturer recommendations.

AADL has a contract with the recycle vendor to manage all AADL-owned wheelchairs in the recycle inventory. AADL has a contract with wheelchair vendors to manage all AADL new purchases and repairs.

#### Returning wheelchairs

Manual wheelchairs are returned to the AADL recycle vendor when the client moves out of Alberta, the wheelchair is no longer needed by the client or the client becomes ineligible for the benefit for any other reason.

AADL-funded wheelchairs are never to be resold by a client, authorizer or vendor.

Parts that are recovered from an AADL wheelchair remain the property of AADL and are used to refurbish AADL recycle wheelchairs.

#### Repairs

Repairs are completed by AADL vendors with a contract for wheelchair new sales and repairs.

Clients are responsible to keep their AADL funded wheelchairs in good, safe working order through regular maintenance and repairs.

A quantity and frequency review request is required for repairs or part changes requested within the first six months of receiving a new or recycled wheelchair, excluding internal transfers.

AADL provides a limited amount for repairs and maintenance to AADL owned wheelchairs, up to a maximum of \$500 annually for manual wheelchairs.

Clients are responsible for any costs above the annual limits. If the client chooses to have a repair made with manufacturer parts rather than generic parts, the upgrade costs are the client's financial responsibility.

AADL does not repair or maintain privately-owned wheelchairs, upgrade or category D wheelchairs. See Policy WM – 11 Definitions for descriptions of upgrade and category D wheelchairs.

Clients with category D wheelchairs are required to keep a record of maintenance and repair history if planning to request funding to replace their wheelchair in the future. See AADL Program Manual Section ZN – Recyclable Benefits: New Purchase and Repair for further information.

#### Procedure

##### Authorizers:

- Ensure client understands responsibility for care, maintenance and return of AADL-owned wheelchairs.
- Advise clients to keep a record of maintenance and repairs to wheelchair.
- Assist client when wheelchair is no longer needed in determining if wheelchair must be returned to AADL recycle.

**Clients:**

- Ensure reasonable care and maintenance of AADL-owned wheelchairs.
- Replace any wheelchair that is lost, stolen, or damaged due to misuse or accidents. AADL recommends clients insure the wheelchair through a private homeowner's/tenant insurance policy.
- Return AADL-owned wheelchair to AADL recycle vendor when no longer needed.

**Vendors for new purchases and repairs:**

- Review care and maintenance of AADL-funded wheelchairs with clients.
- Check online health portal for predetermination of funds available for repairs.
- Submit claim to online health portal for repairs under yearly maximum. Submit authorization for prior approval for parts changes and repairs for all wheelchair repair work orders over \$500 prior to completing the work.
- Once approved, repair AADL-owned wheelchairs.
- Inform the authorizer if a piece of equipment has been deemed irreparable or not cost-effective to repair by AADL so the authorizer can initiate the process to have the wheelchair replaced.
- Notify the client of the price differences between generic parts and manufacturer parts if necessary.
- Contact AADL by phone or email if repair is urgent.
- Collect any cost-share or upgrade costs from the client prior to completing the repair and ensure that the client approves of this.
- Assist client when wheelchair is no longer needed in determining if wheelchair must be returned to AADL recycle.
- Assess AADL-owned wheelchairs no longer required by the client for suitability for AADL recycle program and provide information to client on how and where to return the wheelchair to the recycle vendor.
- Update AADL if client status has changed (e.g. client has moved).

**Recycle Vendor:**

- Recycle-in – Arranges with clients to pick up wheelchair when no longer required and recycle it in the AADL recycle inventory.
- Parts transfers – May be asked by AADL to transfer recycle parts to another vendor that is repairing an AADL wheelchair.
- Tracks all recycle wheelchairs.

**Alberta Blue Cross:**

- Adjudicates and audits claims for repairs and recycle-ins submitted through the online health portal.
- Tracks history of repairs to the wheelchair via client history.

**AADL:**

- Provides funding assistance for repairs and maintenance to AADL-owned wheelchairs.
- Reviews and prior approves eligible cost-effective repair orders over \$500.
- Reviews eligible requests to replace grant wheelchairs. The AADL Equipment Specialist reviews the grant wheelchair maintenance and repair history to determine if the wheelchair has been maintained and is no longer cost-effective to repair. See Policy WM – 06 Quantity and Frequency Limits for eligibility criteria for repairs for grant funded wheelchairs.
- Informs the vendor if a wheelchair has been deemed irreparable or not cost-effective to repair by AADL.

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## Policy WM – 08

### Refusal of the Equipment

#### Policy Statement

Clients who refuse equipment are not eligible for AADL funding for another wheelchair for a minimum of six months. During the authorization process, the client agreed to trial the equipment and ensured their home and living situation accommodated the equipment.

Clients and/or authorizers must notify the vendor as soon as unforeseen problems arise and the equipment is no longer appropriate for the client. If the equipment has not yet been delivered to the client, the vendor may agree to place the equipment back in their inventory with no charge to AADL or the client. In that case, the authorization must be cancelled by the authorizer on the Alberta Blue Cross online health portal.

Clients who request funding for the benefit after refusing the same type benefit must provide a letter to their authorizer explaining the circumstances of their refusal and assurance that they will accept the authorized benefit this time. The client must also agree to accept any costs associated with providing the benefit a second time, including any cost-share fees.

The authorizer must submit a quantity and frequency review request on behalf of the client who refused the equipment.

Clients who refuse to accept equipment a second time will not be eligible again for that benefit.

#### Procedure

##### Authorizers:

- Advise client of the consequences of equipment refusal.
- If client requests the same benefit be authorized that was refused previously, obtain letter from client/family explaining circumstances and providing assurances described in policy above.
- Complete a quantity and frequency review request authorization on the Albert Blue Cross online health portal for the item and upload the letter from the client (family/guardian/trustee) as supporting documentation

##### Clients:

- Participate in reassessment with authorizer.
- Write letter describing circumstances and providing assurances described above.
- Agree to accept costs associated with replacing equipment.

##### 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 request status on the online health portal which can then be viewed on the provider portal.
- Sends notification of the decision to the authorizer, and the client if necessary.

##### AADL:

- Receives the quantity and frequency review request and supporting documentation from Alberta Blue Cross.
- Adjudicates and provides decision to Alberta Blue Cross.

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## **Policy WM – 09**

### **Internal Transfers**

#### **Policy Statement**

An authorizer may transfer a standard, heavy duty or tilt-in-space wheelchair from a client who no longer needs their current AADL-funded wheelchair to a suitable client who does.

The wheelchair must be in good repair and be a good fit for the new client.

Authorizers are responsible for ensuring equipment has been appropriately disinfected before the internal transfer takes place and for transporting the wheelchair to the new recipient.

Repairs/parts changes with the first six months after the wheelchair has been internally transferred do not require a quantity and frequency review. Repairs/parts changes over \$300 require prior approval.

See AADL Program Manual Section ZR – Recyclable Benefits: Recycle Vendor Service for instructions on completing internal transfers.



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## Policy WM – 10

### Patient Claim Statement

#### Policy Statement

Wheelchair 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.

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# Policy WM – 11

## Definitions

### Approved Product List

The approved product list is a list of equipment that AADL purchases. Only products listed on the approved product list will be purchased. This list is revised once the new purchasing agreements are in place.

### Back-up Wheelchair

A back-up wheelchair is a category A manual wheelchair to be used by clients who have received a power chair from the program. The back-up wheelchair is intended for use when the power wheelchair is not in working order or is at the vendor for maintenance/repairs.

### Controlled Transfer

A controlled transfer is when a person can lower themselves from a standing position to a sitting position without “plopping.” This informs AADL how much added durability is required for the wheelchair.

### Custom Wheelchair

Custom wheelchairs are wheelchairs that have:

- a seat frame width of 15” or less (adult wheelchairs only)
- a seat frame width of 21” or greater
- a seat depth of 15” or less by construction (adult wheelchairs only)
- a seat depth of 19” or greater by construction
- an additional custom change – as listed on the spec sheet and approved by AADL

### Dependent Full-time User

A dependent full-time user is a client who is unable to self-propel the wheelchair in any environment and therefore is always dependent on others to be pushed.

### Dependent Part-Time User

A dependent part-time user is a client who is able to propel 10 feet or less and/or change direction within their room and/or is able to wheel independently within their home environment, but unable to self-propel long distances (e.g., to dining room in nursing home) or outside.

### Equipment Trial

An equipment trial is initiated through the recycle vendor first. If equipment is not available through recycle then equipment can be trialed through the client’s vendor of choice. The trial must include accessing the home entrance and rooms, any vehicle the wheelchair will be transported in and environments where the chair will be used such as school/work/community and outdoors (especially in rural settings). Trial wheelchairs are provided by AADL wheelchair vendors according to trial equipment guidelines.

### Formal Recycle

Formal recycle includes all manual and power wheelchairs that are owned and tracked by AADL. Manual and power wheelchairs are recycled-in when the client no longer needs the wheelchair and recycled-out when an AADL authorizer requests a wheelchair with the same or similar measurements/options. Once a wheelchair is no longer economical to repair or refurbish, AADL removes it from formal recycle. These wheelchairs are used for parts and/or declared as surplus. Surplus equipment is handled through Surplus Sales, Service Alberta.

## **Full-time User**

A full-time user is a wheelchair user who uses a wheelchair for a minimum of six consecutive hours in a day. A full-time user may use another mobility device for transferring, but is unable to use it for ambulating.

## **Internal Transfer**

An internal transfer occurs when an authorizer requests an AADL wheelchair be reassigned from an AADL client who no longer needs it to one who does. Some restrictions apply. See AADL Program Manual Section ZR – Recyclable Benefits: Recycle Vendor Service for instructions.

## **On the Bench**

“On the bench” refers to technicians working on equipment full-time.

## **Palliative Client**

A client is deemed palliative if they are in the end stage of a terminal illness (six months or less to end of life). Care is considered compassionate and focused on symptom relief.

## **Part-time User**

A part-time wheelchair user is a client who walks some of the time, uses the wheelchair for fatigue, long outings, etc. or sits in another kind of chair for part of the day.

## **Recycle In/Out**

Recycle-in is when a wheelchair is returned to a recycle vendor. Recycle-out is when AADL assigns a wheelchair from the recycle inventory to go to a client. The recycle-out wheelchair is refurbished prior to being sent out to the client. See AADL Program Manual Section ZR – Recyclable Benefits: Recycle Vendor Service for further information on recycle services.

## **Recycle Inventory**

The recycle inventory includes all the equipment owned by AADL that are tracked in the equipment inventory. AADL equipment is stored at the AADL-approved recycle vendor in the province. See AADL Program Manual Section ZN – Recyclable Benefits: New Purchase and Repair and Section ZR – Recyclable Benefits: Recycle Vendor Service for further information on recycle services.

## **Recycle Vendor**

The recycle vendor is a vendor who has a contract to provide recycled wheelchairs for AADL. The recycle vendor is active in recycling AADL inventory and refurbishing AADL wheelchairs.

## **Standard**

Standard is the term used to describe any wheelchair benefit with a cost fully funded by AADL (subject to cost-share) for eligible clients.

## **Standard Plus Wheelchairs**

Standard plus wheelchairs are any category of wheelchairs that have been approved as an upgrade when the client requests a higher category than they are eligible for. AADL uses discretion in granting standard plus benefit requests. AADL contributes a fixed amount towards the purchase of the standard plus wheelchair based on client eligibility. The standard plus wheelchair is considered AADL-owned as AADL has paid more than 50 per cent of the wheelchair's cost. AADL owns and provides funding towards maintenance and repairs of standard plus wheelchairs. See Policy WM – 04 Authorization Process to determine process for calculating costs.

## **Substitute Wheelchairs**

Substitute wheelchairs are wheelchairs of a different model than requested by the authorizer. These wheelchairs are deemed to match the measurements and features requested on the specification sheet provided by the authorizer.

## **Upgrade Costs**

Upgrade is the term used to describe any costs for benefit features or options that are not covered by AADL and are the responsibility of the client. Cost-share portions are not considered upgrade costs. Benefits that have an upgrade charge to the client are indicated on the wheelchair specification sheets found on the AADL website. Upgrade costs are separate from the term “Upgrade Wheelchair” (see below).

## **Upgrade Wheelchairs**

Upgrade wheelchairs are AADL-funded wheelchairs in any category that are considered owned by the client. These include category D wheelchairs and any wheelchair that the client pays more than 50 per cent for (excluding their cost-share contribution). The client is fully responsible for any maintenance or repair costs on upgrade wheelchairs. See Policy WM – 04 Authorization Process to determine process for calculating client costs.

## **Valid Authorization**

An authorization is considered valid when information is correct and completed in full; all necessary clinical rationale is documented; the client meets the relevant eligibility criteria; any requisite prior approval has been provided; and relevant documentation has been uploaded.

## **Wheelchair Categories**

- Category A is a standard weight wheelchair designed for part- or full-time use. Includes tilt-in-space with back and head rest.
- Category B manual wheelchair is a lightweight wheelchair designed for full-time use indoors and outdoors. The lightweight composition assists clients with upper extremity limitations to maintain independence in self-propelling.
- Category C manual wheelchair is an ultra-lightweight wheelchair designed for more active use indoors and outdoors. The ultra-lightweight and strong materials used in this wheelchair are meant to withstand frequent use for an active lifestyle. They tend to be rigid frames to keep the weight down and improve maneuverability.
- Grant for manual wheelchair – Upgrade or category D. A wheelchair that the client chooses to own and maintain for at least five years.
- Recycle manual wheelchair (category A) is a wheelchair provided through the recycle vendor.
- Category A high weight/heavy duty manual wheelchair is a manual wheelchair designed to accommodate clients who weigh more than 250 pounds. This includes wheelchairs with the heavy duty package added.
- Category A tilt-in-space (base only) manual wheelchair is a tilt-in-space wheelchair that does not come with the seat or back. Intended for clients who require assessment by seating clinic.