

**Alberta Health**

**Alberta Aids to Daily Living  
Pediatric and Adult Wheelchairs Benefits**  

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**Policy & Procedures Manual**

September 28, 2015



## Revision History

Description	Date
Policy W-25 updated	September 28, 2015
Updated format and wording changes Added procedural steps regarding no longer recycling manual wheelchairs more than five years old.	July 1, 2014

Superseded

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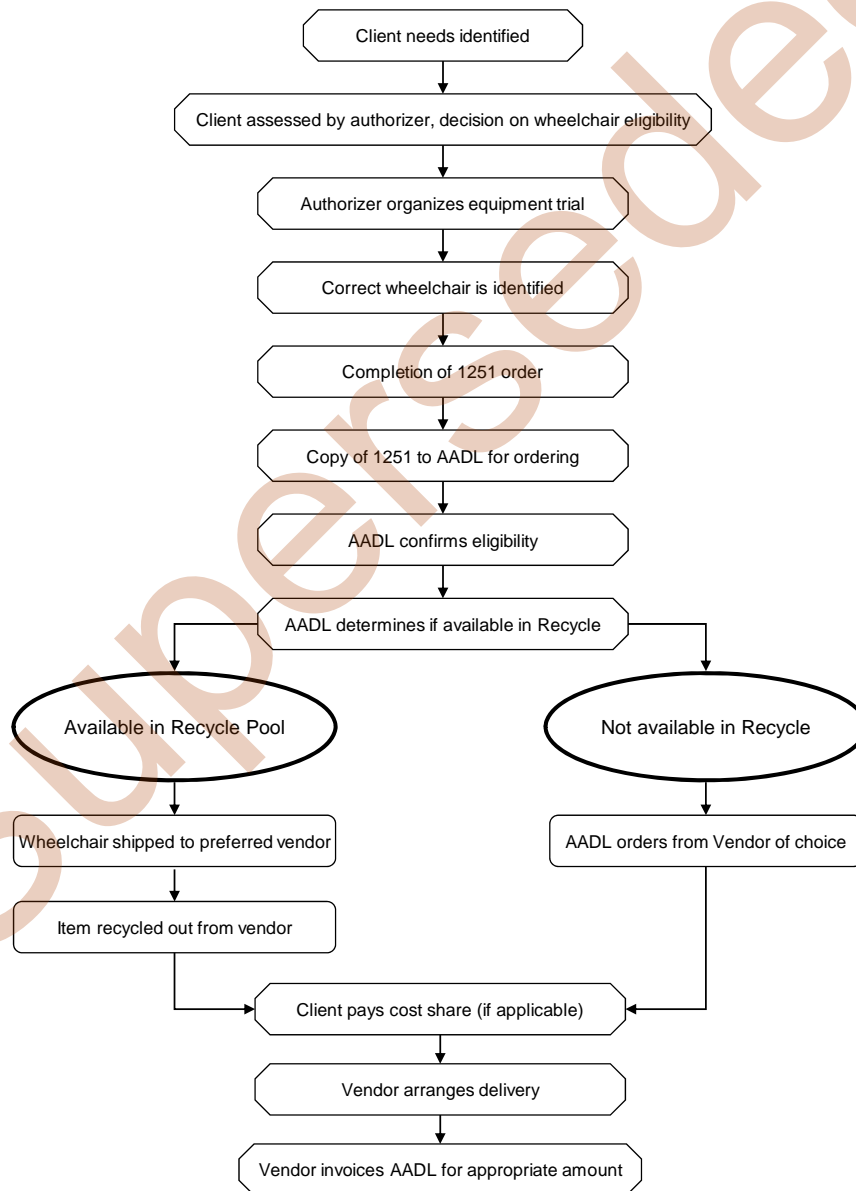
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# Policy W – 01

## Process to Obtain Wheelchair Benefit



## Policy W - 02

### Glossary of Terms

#### Approved Products List (APL)

The APL is a list of wheelchairs 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 Manual Wheelchair

AADL will provide a basic (category “A”) manual wheelchair to be used as a back-up chair for clients who have received a power chair from the program.

#### Equipment Trial

It is required that the client and caregiver trial a wheelchair before it is authorized. Vendors assist with the provision of trial chairs. Trial must include access to home and rooms in home, how the chair will be transported in vehicles, environments where the chair will be used such as school/work/community, and outdoors (especially in rural setting).

#### Formal Recycle

All AADL-owned manual wheelchairs are formally recycled by AADL if they are less than five years old. When the client no longer needs the wheelchair, it is returned to an AADL authorized recycle vendor. When an authorizer requests a wheelchair for a client, AADL first looks for a wheelchair in the recycle pool. When there is no suitable recycle chair available, the program buys a new one.

#### Internal Transfer

An authorizer may ask to reassign a wheelchair from a client who no longer needs it to one who does. While this is a very economical and efficient transfer, some restrictions apply. See “Z” manual for instructions and sample of internal transfer documentation.

#### Palliative Clients

A client is deemed palliative if in the end stage of a terminal illness when care is focused on symptom relief and not cure. A palliative client who requires an AADL wheelchair may receive a manual wheelchair, but cannot receive a power wheelchair through AADL.

#### Recycle In

The process that occurs when a wheelchair is returned to a recycle vendor. See “Z” manual.

## **Recycle Out**

The process that occurs when AADL assigns a wheelchair from the recycle pool to go to a client. The chair is refurbished, and sent out to the client. See “Z” manual.

## **Recycle Pool**

The equipment inventory that is owned by AADL and is stored at various recycle vendors’ locations in the province. See “Z” manual.

## **Recycle Vendor**

A recycle vendor is a vendor who is active in recycling AADL inventory and also sells new product to AADL.

## **Recyclable Benefit**

A recyclable benefit is an AADL-approved assistive device which remains the property of the Government of Alberta and is loaned to clients for their use. If the wheelchair is less than five years old and the client no longer requires it, it must be returned to an AADL recycle vendor to be refurbished and reused.

## **Standard-Plus**

A term describing the purchase option which allows a client to choose a wheelchair from a different category than what the client is eligible for, and the client is prepared to pay upgrade towards the purchase. The wheelchair is owned by AADL because AADL contributes more than half the cost of the wheelchair when the client chooses from a different category.

## **Substitution**

Because AADL recycles wheelchairs, the program has the right to substitute a similar chair rather than the exact one which is being requested. If the authorizer deems that a substituted chair will not meet the client’s needs, clinical documentation must be provided explaining why a substitute will not be acceptable. If the specification sheets are not filled out completely, a wheelchair with standard items will be ordered.

## **Upgrade**

The term describing a purchase option in which the client’s contribution is more than AADL contribution towards the purchase of a wheelchair. The client owns the wheelchair, and AADL does not pay for parts or repairs on Upgrade wheelchairs.

## **Wheelchair types**

R – a wheelchair from the recycle pool

T – a tilt-in-space wheelchair

A – a standard chair, designated as such on the APL

B – a lightweight chair, designated as such on the APL

C – an ultra-light wheelchair, designated as such on the APL

D – a titanium or similar lightweight chair, AADL provides funding towards the purchase



## Policy W - 03

### About the “W” Benefits

#### Policy Statement

The “W” manual contains information about wheelchairs for adults and children.

Information about wheelchair accessories such as cushions, amputee boards, special backs and drop seats are found in the “V” manual.

Special seating is found in the “X” manual.

Information about formal recycle, repair, and maintenance of wheelchairs is found in the “Z” manual.

# Policy W - 04

## Supplier/Vendor

### Policy Statement

Suppliers for the “W” Approved Products List (APL) are listed at the end of the APL. These vendors offer full sales and service for wheelchair manufacturers as identified on the vendor list, and participate fully in the AADL recycle program. Wheelchairs are returned to these vendors for repair and maintenance. If the manual wheelchair is less than five years old and the client no longer requires the chair, it is returned to the vendor and put into the recycle pool.

### Procedure

#### Vendors:

1. Collect the cost-share portion prior to ordering the wheelchair or parts and submitting the serial number to AADL.
2. Submit work order to AADL for wheelchair repair approval or denial.
3. 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.
4. Provide AADL with a list of inventory items each month.

#### AADL:

1. Maintains a list of AADL Approved Wheelchair Suppliers/Vendors.
2. Reviews work orders submitted by vendors for repairs and parts changes to manual wheelchairs.

# Policy W – 05

## Authorizing Benefits

### Policy Statement

An Occupational Therapist, Physical Therapist, or Registered Nurse who is approved as an AADL Program Authorizer for large recyclable equipment can authorize wheelchair benefits.

### Procedure

#### Authorizers:

1. Assess client's equipment needs in their home environment.
2. Confirm client eligibility, including residence and past benefit consumption.
3. Provide client choice of vendor according to Approved Wheelchair vendor list.
4. Trial the equipment to ensure it is appropriate for the client in their environment.
5. Complete the AADL Authorization Form, including the catalogue number and model/brand of product.
6. Read all comments and information on the Approved Product List (APL).
7. Address Need for Prior Approval if required: add clinical information to the Authorization Form to justify the request. Do not phone the AADL office for prior approvals.
8. Mail in Authorization Forms, with the exception of equipment orders for palliative or urgent discharge clients which may be faxed to AADL to be processed within one working day.

#### AADL:

1. Maintains a list of AADL Approved Products that is updated annually.
2. Maintains a list of AADL Approved Vendors.
3. Sets eligibility criteria for different categories of wheelchairs.
4. Processes authorizations.
5. Pays claims.

## Policy W – 06

### Wheelchair Eligibility Criteria

#### **Policy Statement**

Eligibility for wheelchairs benefits is as per the standard criteria in the “Policies and Procedures” section at <http://www.health.alberta.ca/documents/AADL-Policy-Procedures.pdf>.

#### **Residence Criteria**

These benefits are not provided to persons who are in acute/general hospital except as part of a definitive discharge plan. If the wheelchair is ordered by an AADL Authorizer employed at the hospital the chair must still be trialed in the home setting.

#### **Restricted Eligibility Criteria**

Client eligibility for a specific wheelchair model is determined by a combination of frequency of wheelchair use and independence of use. Some wheelchairs have other restricted eligibility. See the APL for details about categories of wheelchairs, and wheelchair assessment information.

#### **Short-term use**

AADL wheelchairs are not to be ordered for short-term use. AADL defines short-term use as when equipment is needed for less than six months. Short-term equipment is available through regional community loaner pools and the Red Cross. Rentals are also available through vendors.

## Policy W – 07

### Wheelchair Quantity and Frequency Limits

#### Policy Statement

The quantity and frequency limit for wheelchairs is one per five-year period, based on clinically-assessed need.

A wheelchair should only be replaced for the reasons listed in W-08.

If a client was provided with a recycle out wheelchair that is now older than 5 years, but has had the wheelchair in their possession less than 5 years, please note that a QFR **is not required** in order to obtain a new wheelchair. The authorizer must indicate the reason for obtaining a new wheelchair in section 5 of the 1251.

Clients who receive an AADL-purchased power wheelchair may also have a Category A AADL manual wheelchair for back-up use.

#### Procedure

##### Vendors:

1. Collect the cost-share portion of cost for wheelchair prior to ordering the equipment.

##### Authorizers:

1. Advise clients of quantity and frequency limits.
2. Follow the Quantity and Frequency Review (QFR) process if the client is over quantity.
3. Submit QFR to AADL.
4. Submit 1251 form to AADL if QFR is approved.

##### AADL:

1. Adjudicates for QFR and provides a response to the client and the Authorizer.

## Policy W – 08

### Replacement of Wheelchairs

#### Policy Statement

AADL **will** replace wheelchairs if the following criteria are met:

- The client no longer fits the chair and it cannot be adjusted to fit, or
- The client has had a major change in medical status which necessitates changing the wheelchair (e.g., client has a standard chair and now needs a reclining chair/tilt) or,
- AADL has determined the client's wheelchair is no longer economical to repair.

When the wheelchair vendor receives a chair to repair they will assess the chair and submit a cost estimate to AADL. AADL will determine if it is cost effective to repair and will provide the vendor with program direction regarding repair or replacement. The authorizer will be advised accordingly by the vendor.

AADL will not make changes to and/or exchange a chair for a one inch difference in size (width, depth, seat to floor height).

#### Procedure:

##### Authorizers:

1. Determine age of client's wheelchair, if,
  - a. wheelchair is less than five years old and client has not had a substantial change in condition, submit a Quantity and Frequency Review (QFR) request to AADL
  - b. there is a substantial change in the client's condition including growth in a pediatric client, provide clinical information in Section 5 of the 1251 Form.
  - c. client has been provided a manual wheelchair for longer than one year and now requires a tilt-in-space wheelchair, provide clinical rationale in Section 5 of the 1251 Form.
2. Trial wheelchair with client.
3. Submit a new 1251 form to AADL.
4. Whenever possible, follow up with the client to ensure new wheelchair is meeting client's needs.

## Policy W – 09

### Ownership and Responsibility

#### Policy Statement

##### Ownership

AADL retains full ownership of all Standard and Standard-Plus wheelchairs. These chairs are not for resale. Wheelchairs less than five years old will be formally recycled and manual wheelchairs older than five years can be recycled in the community.

Wheelchairs five years old or less must be returned to a wheelchair recycle vendor when:

- the client no longer needs it,
- when it has been replaced by AADL,
- when the client moves out of Alberta, or
- if for any other reason the client becomes ineligible for the benefit.

The client owns a Category "D" chair regardless of the amount they have contributed.

AADL repairs and maintains all AADL-owned wheelchairs.

AADL does not repair privately owned wheelchairs. Clients who have an Upgrade wheelchair have contributed over half the cost of the wheelchair and own the chair. AADL does not repair or maintain Upgrade or Category "D" wheelchairs.

#### Procedure

##### Clients:

1. Are responsible to ensure there is reasonable care and maintenance of AADL-owned wheelchairs.
2. Will be held responsible for replacement of any wheelchair that is lost, stolen, or damaged due to misuse or accidents.
3. Will follow AADL program recommendation to insure the wheelchair through the client's homeowner's/tenant insurance policy.

**AADL:**

1. Assists with repairs and maintenance to AADL-owned wheelchairs. See “Z” benefits. AADL repairs equipment/wheelchair with generic parts. If the client chooses to have the repair made with manufacturer parts, the upgrade costs are the client’s financial responsibility. Vendors are responsible to notify the client of the price differences between generic parts and manufacturer parts.
2. Does not assist with repairs or maintenance to privately-owned manual wheelchairs or power wheelchairs. See “Z” manual.

Superseded



# Policy W – 10

## Categories for Clients and Wheelchairs

### Policy Statement

Wheelchairs are described on the APL as being “A”, “B”, “C”, or “T” (tilt-in-space). Wheelchairs supplied may be new or previously used and refurbished from the recycle pool.

### Client Eligibility for Wheelchairs

Client eligibility is based on both the client’s frequency of wheelchair usage, and their degree of independence of use. Eligibility is determined by the Authorizer and confirmed by AADL.

### Definition of Frequency of Use:

#### Part-time User

Client who walks some of the time, or uses the wheelchair for fatigue, long outings, etc. or sits in another kind of chair for part of the day. These clients qualify for an “A” chair. AADL recognizes that the client may have an individual need, and the Authorizer may request “no substitute” by providing exact clinical documentation supporting the “no substitute” request.

#### Palliative Client

A palliative client will receive a chair from the recycle pool (“R”) if one is available. If one is not available, a new wheelchair will be purchased.

#### Full-time User

Client who:

- does not use another mobility aid except for transferring (e.g. walker, cane), and/or
- uses the chair the whole time client is up during the day (must be up a minimum of 6 hours a day).

The full-time user client is eligible for an “A”, “B”, “C”, or “T” category chair. This will depend on the level of independence and user criteria the client has achieved. See section below for description of independence of use. The chair provided may be new or from the recycle pool inventory.

### Independence of Use

#### Dependent Full-time User

Client does not propel the wheelchair, is pushed all the time. The authorizer may request a “no substitution” with clinical documentation to support the request.

#### **Part-Time User**

- Within room: Able to propel 10 feet or less and/or change direction.
- Within home: Able to wheel independently within home environment, except for very long distances (e.g., to dining room in nursing home), but not outside.

The authorizer may request “no substitute” with clinical documentation to support the request.

#### **User Criteria**

“**A**” – A fully independent user, client is active indoors, propels around the house/ residence independently.

“**B**” – A fully independent user, client is active indoors and outdoors. Client frequently propels into the community alone.

“**C**” – A fully independent user, client is active outdoors, frequently propels into the community alone, and has upper extremity weakness (as documented by a standard muscle test which substantiates the weakness relative to the medical condition),

#### **OR**

A fully independent user, client is active outdoors, frequently propels into the community alone, and describes a lifestyle with a permanent/non-progressive illness/injury with a need to prevent upper limb overuse injury (e.g. paraplegia).

## Policy W – 11

### Category “D” Wheelchairs – W998 for Adults Only

#### Policy Statement

The category “D” chair refers to very lightweight wheelchairs (generally made of titanium), which are available through AADL wheelchair vendors.

AADL provides funding to those adults who are eligible for an AADL “C” category wheelchair and want to “upgrade” to a “D” category wheelchair. The funds will be paid directly to the vendor once the purchase has been approved by AADL, fees are paid by the client, and the chair has been ordered and supplied to the client (service date). The individual will own the chair. It will be recorded in the AADL client consumption as an “upgrade” chair, regardless of the full cost of the chair. AADL will not pay for repairs or maintenance of these chairs. A quantity/frequency limit of one “D” chair grant per six years will be strictly enforced. The current contribution is \$3,600.00.

#### Category “D” Eligibility Criteria

The adult client must meet the AADL eligibility criteria for a “C” category wheelchair:

The client is a full time, active and independent user who frequently propels into the community alone and has upper extremity weakness, as documented by a standard muscle test, which substantiates the weakness relative to the medical condition,

OR

The client is a full time, active and independent user who frequently propels into the community alone, and describes a lifestyle with a permanent, non-progressive illness/injury with a need to prevent upper limb overuse injury, e.g., paraplegia.

When a client is approved for a “D” Category manual chair, they will not be eligible to apply for a power wheelchair for a minimum of one year.

#### Procedure

##### Authorizers:

1. Determine that the client meets the “C” category eligibility. Authorizers complete a standard muscle test to confirm the upper limb weakness, and/or clinically identifies the shoulder injury/injury risk and documents this in Section 5 of the 1251 Form.
2. Will complete measurements and specifications for the order.

3. Complete and sign an AADL 1251 authorization form, indicating Catalogue #W998 for a “D” category wheelchair, and marking the “yes” check box to confirm the client’s wish to “upgrade” to a “D” category wheelchair. In the 1251 Section 5 “Additional Information”, the authorizers should also write, “This is a request for category D funding”. A preferred vendor must be indicated on the 1251.
4. Advise client they will sign the “Category D Client Declaration” form at the vendor. The declaration on the 1251 is not required.
5. Forward the 1251 AADL copy (and the muscle test when applicable, and/or any other clinical information regarding the shoulders) to AADL for prior approval. The vendor copy is sent to the preferred vendor. A copy is given to the client.

**Clients:**

1. Are well informed about wheelchairs and his/her specific wheelchair requirements.
2. Are well informed about the AADL program, cost sharing, his/her cost share status, “C” category wheelchairs, and “D” category wheelchair choices.
3. Determine what “D” chair will meet his/her needs, in collaboration with an AADL wheelchair vendor.
4. Actively participates in computing the measurements and specification sheets for the order, in collaboration with the AADL vendor.
5. Arrange funding for the chair to include all costs exceeding the AADL contribution, and when applicable, the cost-share portion.
6. Sign the “Category D Wheelchair Client Declaration Form” which is available at the vendor’s business. The original declaration form and a copy of the specifications are forwarded to the AADL program and will be placed on the client file along with a copy of the 1251. The client’s personal health care number (PHN) must be documented on the Client Declaration form.

**Vendors:**

1. Are designated by the wheelchair manufacturer/distributor as an approved outlet for sales and service. Vendors determine that the chair/chair line has been RESNA certified.
2. Work with the client and authorizer to determine the correct chair, correct chair fitting, and chair specifications and correct order form.
3. Receive notification of prior approval from AADL.
4. Complete the specification sheets and order form.
5. Provide and have the client sign the Category “D” Wheelchair Client Declaration form, and forward the signed form and a copy of the specifications to AADL.
6. Invoice the client for the cost share when applicable, and the balance owing.
7. Order the chair and dispense the wheelchair once it is available, when the client’s portion has been paid.
8. Invoice AADL for the allowable payment, recognizing the client’s cost-share status on the service date.

**AADL:**

1. Reviews the 1251, muscle test and/or supporting clinical data, and will prior approve the client for a Category “D” wheelchair.
2. Notifies the preferred vendor of the prior approval.
3. Provides replacement of Category “D” wheelchair after six years’ of client use and submission of clinical justification to replace the wheelchair.

Superseded

## Policy W – 12

### Standard, Standard-Plus and Upgrade Equipment

#### Policy Statement

##### Standard

Benefits are designated on APL in all categories (“A”, “B”, “C” and “SP”) and are fully funded by AADL for clients who are eligible for the chairs (subject to cost sharing). AADL owns and maintains the equipment.

##### Standard Plus (SP)

If a client chooses to upgrade to a chair for which they are not eligible, the client may request to do so at their own personal expense. AADL will use discretion in granting these upgrade and standard-plus benefit requests. In this case, AADL contributes a fixed amount towards the purchase of the “B” or “C” or “T” (for adults) chair. This amount is based on client eligibility. The wheelchair then becomes either “Standard-Plus” or “Upgrade” depending on who has contributed the greatest amount (excluding the cost-share amount) towards the purchase of the chair. AADL owns and maintains Standard-Plus chairs. The client owns and maintains Upgrade chairs.

Current AADL Contribution	Client Type
\$1600	“A”
\$1900	“B”
\$2300	“C”
\$1800 or 51% of chair cost in order for chair to be SP	“T” Client needing tilt

#### Examples: “Doing the Math”

1. **“A” category client wants to purchase “B” category chair**  
\$2400      Cost of AADL chair after discount  
\$1600      Minus AADL maximum contribution  
\$ 800      Client pays difference

Chair is Standard-Plus and AADL owns/maintains chair  
If cost sharing, client also pays 25% of the \$1600 (\$400)

2. **Adult client qualifies to obtain a “Tilt-in-Space” wheelchair**

\$3500 Cost of AADL chair after discount  
\$1800 Minus AADL maximum contribution  
\$1700 Client pays difference

Chair is Standard-Plus, and AADL owns/maintains the chair  
If cost sharing, client also pays 25% of the \$1800 (\$450)

Or for an unusually expensive chair:

\$4500 Cost of AADL chair after discount  
\$2295 Minus AADL maximum contribution of 51%  
\$2205 Client pays difference

Chair is Standard-Plus, and AADL owns/maintains the chair  
If cost sharing, client also pays 25% of the \$2295 (\$500 max.)

3. **“B” category client wants to purchase “C” category chair**

\$3700 Cost of AADL chair after discount  
\$1900 Minus AADL maximum contribution  
\$1800 Client pays difference

Chair is Standard-Plus, and AADL owns/maintains the chair  
If cost sharing, client also pays 25% of the \$1900 (\$475)

**Upgrade**

Benefits that have an “upgrade” charge to the client may be listed on the wheelchair APL as a choice for clients. If a client chooses an upgraded wheelchair, the program will provide a maximum contribution based on client eligibility (“A”, “B”, “C”, or “SP”) towards the purchase. The extra amount which is the client’s responsibility to pay is greater than the AADL maximum contribution. In this case, the client will own the equipment and will be responsible for ongoing maintenance and repair. AADL will not replace this chair for a minimum of six years.

\$4000 Cost of AADL chair after discount  
\$1600 Minus AADL maximum contribution for “A” client  
\$2400 Client pays difference

Chair is Upgrade, and client owns/maintains the chair  
If cost sharing, client also pays 25% of the \$1600 (\$400)

## Procedure

### Authorizers:

1. Explain client eligibility to the client and clearly indicates which wheelchair a client is eligible to receive.
2. Clearly explain client's responsibility and clearly state what client will have to pay for the selected wheelchair.
3. Fill out AADL 1251 form and submit it to AADL with specification sheets and tilt-in-space request form if ordering tilt.
4. Whenever possible, conduct a follow-up assessment to ensure wheelchair is meeting client's need.

### Clients:

1. Sign the Client Declaration.
2. Arrange for funding to include all costs exceeding the AADL contribution and, when applicable, the cost-share portion.
3. Assume responsibility for the care and maintenance of the wheelchair.
4. Accept responsibility for the cost associated with repair and maintenance if the wheelchair is an upgrade.

### Vendors:

1. Are designated by the wheelchair manufacturer/distributor as an approved outlet for sales and service. Vendors determine that the chair/chair line has been RESNA certified.
2. Work with the client and authorizer to determine the correct chair, correct chair fitting, and chair specifications and correct order form.
3. Receive notification of prior approval from AADL.
4. Complete the specification sheets and order form.
5. In the case of a Category "D" wheelchair, provide and have the client sign the Category "D" Wheelchair Client Declaration form, and forward the signed form and a copy of the specifications to AADL.
6. Invoice the client for the cost share when applicable, and the balance owing.
7. Order the chair and dispense the wheelchair once it is available, after the client has paid.
8. Invoice AADL for the grant payment, recognizing the client's cost-share status on the service date.



# Policy W – 13

## 1251 Form

### Policy Statement

The 1251 authorization form is used for any wheelchair-related transaction including: wheelchair requests, seating clinic wheelchair orders, wheelchair review requests and internal transfers (see sample of 1251 Wheelchair Authorization Form in Appendices).

### Procedure

1. Fill out the AADL 1251 form completely (see below).

**Section 1 – must be completed.** Preferred vendor **must** be indicated. If a new chair is to be purchased, that vendor will receive the business. If the delivery address is different from the client's address, this information must be added (a wheelchair cannot be delivered to a box number).

**Section 2 – must be completed.** This section describes the client weight, the intended use of the chair and the environment in which the chair will be used. These questions and answers should lead the authorizer to making appropriate choices about chair features (e.g., does the chair need quick release axles to fit in the trunk, does the chair fit in the home).

**Section 3 – must be completed.** Indicate the model of chair being requested. If a substitution will not be acceptable you must indicate why not in Section 5 of the 1251 Form. If the client is requesting an Upgrade or Standard-Plus chair, AADL needs to be assured that the clients knows and understands the implication of extra client costs and ownership issues and the corresponding boxes must be checked off.

**Section 4** – specification sheet(s) must be attached.

**Section 5** – this section is provided so the Authorizer can add extra information. This may be to describe an internal transfer, caregiver concerns, clinical information, description of repairs being requested, description of parts being requested, an explanation of why a comparable substitute wheelchair is not acceptable, etc.

**Section 6** – Authorizer information **must be completed**.

**Section 7** – for AADL Office use only.

**Section 8** – **must be completed**, including client signature, and consent portion. All boxes must be checked off.

2. Mail in original AADL 1251 form with signed client declaration and specification sheets to AADL. Retain a copy of the AADL 1251 form in the client's medical file.
3. Wheelchair orders for palliative and urgent discharge clients may be faxed to AADL. They will be processed within one working day. Clients for these orders are supplied with wheelchairs from the recycle pool. If there is no comparable substitute available, AADL will order a new wheelchair.

Superseded

## Policy W – 14

### Wheelchair Assessment Tool

#### Policy Statement

The Wheelchair Assessment Tool must be completed by the Authorizer for each AADL wheelchair authorization. The Authorizer adds it to the authorizer's client file. The assessment tool should be retrievable for AADL audit purposes. The tool is intended to assist the Authorizer with the assessment, and to help eliminate errors and omissions on the assessment and wheelchair order. (See the Appendices for sample form.)

#### Procedure

##### Authorizers:

1. Assess client for a manual wheelchair using the assessment tool as a guide.
2. Document results on the assessment tool.
3. File the assessment tool in the client's clinical file.

## Policy W – 15

### Understanding the Approved Product List

#### Policy Statement

The Approved Products List (APL) is accompanied by a cover page, which states the effective dates of the purchasing agreement.

The first column is the AADL Catalogue Number. The second column describes the wheelchair and may list certain features such as available sizes, weight bearing capacity, frame construction, and color.

Eligibility is described for both children and adults in the next two columns.

Additional comments may be provided, such as “model will be discontinued by manufacturer during the year”, or “subject to availability”.

The “Discount” column indicates the amount of discount that has been bid for the duration of the purchase agreement. This is disclosed so therapists can refer to specification sheets, apply the discount, and advise the clients of roughly what their costs will be.

See current APL in the Appendices.

#### Procedure

##### Authorizers:

1. Check the Approved Product List (APL) before trialing wheelchairs with the client.
2. Explain to the client that AADL only funds products on the APL.

## Policy W – 16

### Vendor List

#### Policy Statement

The wheelchair vendor list is updated and provided with the new Approved Products List. It is an alphabetical listing of vendors who have entered into a purchasing agreement with AADL for wheelchair benefits. It includes the current business name and business location, brands of wheelchairs available at that business, a contact person, and telephone/ fax numbers. This list is dated, and may be updated during the year as needed. It is located following the APL.

#### Procedure

##### Authorizers:

1. Check the Approved Vendor List on the AADL website and provide clients with a choice of vendor.

##### Clients:

1. Choose an approved AADL vendor.

# Policy W – 17

## Prior Approval Process

### Policy Statement

Some wheelchair benefits on the APL require “prior approval”. Authorizers should not telephone AADL for this approval. Extra clinical information must be supplied on the 1251 Form in Section 5 “Additional Information” which will explain the client’s special need and follow the procedure in Policy W-12. These requests for prior approval equipment are reviewed and approved/denied by the AADL Program Manager, Mobility and Equipment.

### Procedure

#### Authorizers:

1. Clearly document the prior approval request in Section 5 of the 1251 form.

## Policy W – 18

### Trial Equipment – Guidelines from the Vendors

#### Policy Statement

Wheelchair vendors will provide a wheelchair for a trial period. This period should not exceed three days. At the end of the trial period, the Authorizer must arrange to have equipment returned. The client may not keep the trial equipment for ongoing use.

Guidelines have been prepared by the Medical Surgical Dealers' Association for use with authorizers and clients describing vendor expectations and client responsibilities for the trial equipment (see "Authorizer Copy" and "Client Copy" guidelines in Appendices).

#### Procedure

##### Authorizers:

1. Policies for the use of trial equipment should be explained to the client. See the form for client use: "AADL Trial Equipment Use" on the AADL website.
2. Arrange for any trial equipment to be returned to the vendor.
3. Advise client that AADL will not reimburse clients for any rental charges if the client chooses to rent equipment from the vendor.

##### Vendors:

1. Provide trial equipment as requested by the Authorizer.

##### Clients:

1. Return equipment to AADL approved vendor after trial period is over.
2. Comply with trialing protocol i.e., dry run only, does not sit on bathing/toileting aid with exposed skin.

# Policy W – 19

## Product Information and Specifications

### Policy Statement

Authorizers must be aware of the products on the APL. In addition to any information provided on the APL, the authorizer should be aware of the following:

#### Heavy-Duty Wheelchairs

Provided only to those whose weight exceeds 250 pounds (the standard chair capacity), those who require the width, and to heavy users. Oxygen/ventilator users must consider the added weight of the oxygen/ventilator apparatus when considering the needed weight bearing capacity of the wheelchair.

#### Tilt-in-Space Wheelchairs – Children

Provided to children as a standard benefit ordered only through a Seating Clinic. Clinic must complete and submit the 1251 Form. A Pediatric Tilt-in-Space Request Form must be submitted with the 1251 Form.

#### Tilt-in-Space Wheelchairs – Adults

Adults requiring tilt-in-space must request a standard-plus option. This is a “prior approval” item which requires rationale in Section 5 of the 1251 Form. A Tilt-in-Space Manual Wheelchair Request Form must be submitted with the 1251 Form.

#### Lightweight Chairs

AADL will provide reinforcement or a heavy-duty package to an approved lightweight wheelchair.

#### Adult and Child Power Chairs

Client and Authorizer must submit a power wheelchair application, specification sheet, and 1251 Form. The application is reviewed and applicants receive written response to their application.

#### Geri Chairs

AADL does not purchase “Geri” chairs. The responsibility for purchase of these chairs lies with the client, the family, or the institution.



## Manual Wheelchair Options

The Wheelchair Specification Sheets on the AADL website show the available options funded by AADL.

AADL does not cover all possible options on manual wheelchairs. Exclusions are indicated on the online specification sheets by an asterisk and include:

- Fixed height arm rests
- Backpacks
- Monogramming
- Colour options

Clients will be asked to assume financial responsibility for ongoing maintenance and the extra charges if they wish to purchase certain options including:

- Performance tires
- Flat-free inserts in casters or wheelchairs where urethane is available
- Aluminum caster hubs when composite is available
- 3" roller blades on adult chair frames
- 26" and 25" or high performance wheels
- 9 spoke composite wheels
- Seat belts other than approved generic ones
- Crutch/cane holders
- Touch up paint
- Tire pumps
- If a client chooses to have manufactured parts used rather than the AADL-funded generic part, they will be financially responsible for the additional cost.

The client must be prepared to assume financial responsibility for some options on power chairs that are not provided by AADL. Client must be prepared to assume financial responsibility for them if they want AADL to order the feature on the chair. This includes the following:

- Communication modem
- Printer
- Cosmetic accessories
- Attendant controls
- Van-style seating
- Power tilt-in-space (if not approved and purchased by AADL) \*
- Power recline (if not approved and purchased by AADL) \*
- Environmental controls, unless needed with communication devices
- Computer attachments
- Power seat elevators
- Power legrest
- Light packages
- Upcharge for custom colours
- Blue tooth option if there is an upcharge
- High speed motors
- Head arrays, fiber optics, etc.

- \* Clients are also responsible for cost of repairs to power tilt/recline systems, power recline systems and/or power elevating leg rest systems if the systems or any upgrade products that were not approved and purchased by AADL.

## **Procedure**

### **Authorizers:**

1. Are aware of the wheelchair specifications that are funded by AADL and do not submit an AADL 1250 or 1251 form with requests for funding for specifications that AADL does not fund, unless they have received prior approval from the Director of AADL.
2. Clearly explain to the client or person financially responsible for the client what options/specifications are funded by AADL and which are the client's responsibility.

### **Clients:**

1. Arrange for funding to cover the cost of any wheelchair specifications/options that are not funded by AADL in addition to the cost-share portion where applicable.

### **Vendors:**

1. Will not bill AADL for wheelchair specifications/options that are not funded by AADL.

## Policy W – 20

### Automatic Defaults

#### Policy Statement

If information is missing on the 1251 Form and/or specification sheets are not attached, AADL staff will order the wheelchair using a list of standard defaults.

Info Missing	Default
Seat to floor height	Adult seat to floor height (19") will be ordered If height is chosen we will default on wheels and casters to get that height
Caster	8" urethane or solids
Wheel	24" full profile urethane
Axle type	Threaded axle
Wheel lock type	Push to lock
Hand rim type	Standard or no charge
Backrest type	Only adjustable, where available as standard or no charge, set at 16"
Front rigging	Swing away footrest with composite foot plates and heel loops, 70 degree where available
Armrest type	Full length height adjustable)
Seatbelt type	Auto closure, 2-piece

## Policy W – 21

### Guideline for Choosing Appropriate Wheelchair Relative to Client Weight

#### Policy Statement

The Manufacturer weight limitation on wheelchairs is 250 pounds unless specified differently on the APL. How the client transfers and how they use their wheelchair may affect how much the wheelchair can bear. Clients whose weight is close to 250 lbs. and who are very active or have an uncontrolled transfer should be moved into a heavy-duty wheelchair or wheelchair with a higher weight limit.

#### Procedure

##### Authorizers:

1. Ensure an accurate client weight is obtained prior to trialing equipment.
2. Ensure the client's weight is stable for at least six months prior to ordering new equipment.
3. Ensure client weight does not exceed the weight capacity of the wheelchair.
4. Clearly explain wheelchair weight capacity to the client.
5. Consider how close the client is to the maximum weight limit of the wheelchair since most clients will gain extra weight within the first year of receiving their first wheelchair.

##### Clients:

1. Is aware of the weight capacity of the wheelchair and will consult an Authorizer for a reassessment if their weight is close to or exceeds the weight capacity of the wheelchair .

## Policy W – 22

### Ventilator-Dependent Clients

#### Policy Statement

Authorizers who are ordering a wheelchair for a ventilator-dependent client must call the AADL mobility clerk for information about vent trays. The wheelchair choice may be restricted depending on the chair's ability to carry a ventilator. The program will provide the vent tray as a standard benefit.

#### Procedure

##### Authorizers:

1. Contact the AADL mobility clerk and confirms the ventilator tray is compatible with the wheelchair.
2. Submit the AADL 1251 form with ventilator tray clearly stated in Section 5 and following the procedure in Policy W-12.

## Policy W – 23

### Oxygen Holders

#### Policy Statement

AADL-funded oxygen users may have an oxygen holder for their wheelchairs as a standard benefit. Those who are not AADL funded for their oxygen may not.

Manual Wheelchairs – Can Oxygen Tank be Attached?			
Maple Leaf		PDG	
NRG & Gold	Yes	Bentley	No
NRG Recliner	Yes	Eclipse	No
Supertilt	Yes	Stellar	No
Swift	Yes	Stellar Tilt	No
EZride	Yes		

Invacare		Sunrise			
9000 Recliner	Yes	Breezy 600 (West.HC model)	Yes		
9000 Topaz	Yes	Quickie 2	No		
9000 XDT	Yes	Quickie GP	No		
9000 XT	Yes	Quickie GPS, GPV	No		
Action A4	No	Quickie Kidz	No		
Action AT	No	Quickie LXI	Yes		
Compass XE	No	Quickie M6	No		
Concept 45	No	Quickie TS	No		
JYMNI	Yes	Quickie XTR	No		
Orbit	No	Zippie	No		
Patriot (West HC model)	Yes	Zippie GS	No		
Pro/Pro T	No	Zippie TS	No		
Solara, JR	No	Myon	Yes		
Tiger	No	Lifestream	Yes		
		Catalyst 4/5	Yes		
<b>Power Chairs – Can Oxygen Tank be Attached?</b>					
<b>**Not on Power Tilt/Recline**</b>					
Sunrise		Invacare		Pride Mobility	
Xperience	Yes	TDX SP	Yes	Quantum 6000	Yes
Quickie P222SE	No	M71 JR	Yes	Quantum 600/Edge	Yes
Quickie S646 SE	No	Pronto 94-91	No	QJ6	Yes
Xplorer	Yes	TDX SC	Yes	Quantum 1450	Yes
323	No	Storm G3	Yes		
Permobil		Ranger			
K300JR	Yes	Express	Yes		
C300PS	Yes	Express Compact	Yes		
C300 Corpus	No	904	Yes		

## Procedure

### Authorizers:

1. Record in Section 5 of the 1251 Form that they are ordering a wheelchair with an oxygen holder.
2. Contact the AADL Tech Specialist for information on availability of holders for specific models of chairs.

Superseded



## Policy W – 24

### Back-Up Manual Wheelchairs

#### Policy Statement

AADL will provide a back- up manual chair to clients that have been provided a power wheelchair. AADL will provide an “A” Category chair as a standard benefit. The client may choose to use the Standard-Plus or Upgrade options if they wish to have a manual back-up wheelchair from the “B” or “C” categories.

#### Procedure

##### Authorizers:

1. Clearly explain the purpose of an AADL manual back up wheelchair to the client.
2. If the client chooses upgrade/standard plus options, clearly explain that the cost which exceeds AADL’s maximum contribution are the client’s responsibility and follow Policy W-12 for submitting the 1251 Form.

##### Clients:

1. Arrange for funding to cover the cost exceeding AADL’s maximum contribution. This is in addition to the cost-share portion, where applicable.

## Policy W – 25

### Power Wheelchairs

#### Policy Statement

Applications for power wheelchairs will be reviewed by the Program Manager for Mobility and Large Equipment.

#### Adults

AADL provides power wheelchairs to adults on a limited basis with the chairs going to those with the greatest need for power mobility.

AADL will not provide power wheelchairs to those who are able to functionally walk or to mobilize independently in a manual wheelchair. The client must be living in a fully accessible environment.

AADL will purchase power tilt, and tilt/recline power chairs for adult. AADL will retrofit power tilt if it cost effective to do so. Authorizers must obtain approval prior to retrofitting a power wheelchair with tilt/recline by calling or emailing AADL Technical Specialist. AADL will buy only the tilt system that is identified on the manufacturer's specification sheet. The Adult Power Tilt-In-Space Request Form is part of the Adult Power Wheelchair Application form and must be completed for all power tilt requests.

See Appendices for Adult Power Chair Application form.

#### Pediatric Clients (under 18 years old)

The first power wheelchair for a pediatric client may be provided based on supplied clinical documentation of need on the application form. However, subsequent applications for a replacement chair must include information about client's use of the chair at home and school, community activities, wheelchair-accessible home as documented on the Pediatric Power Application Form and confirmation via trial of child's ability to safely operate a power wheelchair. See the forms section on the AADL website for the Pediatric Power Application form.

Power tilt and/or recline is not funded by AADL for pediatric clients. The Authorizer should explain to the client and/or the family alternate funding for these features.

## **Procedure**

### **Authorizers:**

1. Determine eligibility for power wheelchair.
2. Complete Authorizer section of the power wheelchair application form.

### **Clients:**

1. Fill out client information section of the application
2. Pay cost share

### **AADL:**

1. Program Manager reviews all power wheelchair applications
2. Sends letters outlining decision to the Authorizer and the client.

## Policy W – 26

### Privately-Owned Wheelchairs

#### Policy Statement

AADL does not assist with the costs of batteries, parts or repairs for privately-owned mobility devices including manual wheelchairs, power wheelchairs or scooters.

Low-income Albertans who receive financial assistance through Income Supports or AISH may approach their caseworker for possible assistance.

Individuals who are no longer eligible for financial assistance from Income Supports or AISH for batteries, parts or repairs of their privately-owned equipment may wish to contact community organizations or their private insurer for assistance.

#### Procedure

##### Authorizers:

1. Assess clients for clinical need and ensure clients meet the AADL eligibility criteria.
2. Clearly explain AADL eligibility criteria to the client.
3. Submit authorizations to AADL with any additional clinical documentation, where applicable.

##### Clients:

1. Are aware of which equipment was purchased by AADL and which equipment was funded by other sources.
2. Pay for costs associated with the purchase or repair of any parts/equipment not funded by AADL.

##### Vendors:

1. Maintain an awareness of equipment not funded by AADL.
2. Check the IVR to ensure equipment is funded by AADL prior to servicing or repairing equipment.
3. Submit work orders to AADL for the servicing of only AADL funded parts and equipment.

# Policy W – 27

## Helpful Hints for Authorizers

### Policy Statement

- Complete all authorization forms correctly.
- Provide a wheelchair specification sheet that is identified on the AADL purchasing agreement. These sheets change from year to year, but vendors have copies of the sheets AADL is using. Read and observe the footnotes on the spec. sheets. Be sure to add client name and PHN to each spec. sheet. The authorizer is responsible for filling out the spec sheets and for the accuracy of the specification requested on the spec sheet .
- Do not add components that do not appear on the specification sheet.
- Do not mix and match manufacturers' parts.
- Never use pink Authorization Correction Forms for errors on wheelchair orders. Fax or E-mail information such as errors, omissions or corrections to the AADL Mobility Clerk that deals with that particular vendor.
- When ordering a replacement wheelchair, you must justify why you are asking to change the chair using the Quantity and Frequency Review Request Form if needed or Section 5 of the 1251 Form if no QFR is required.
- If the wheelchair is not to be delivered to the client's home, you must identify the facility name and address of where the wheelchair is to be shipped.

### Procedure

#### Authorizers:

1. Remain up-to-date on AADL policy and procedures by referring to the AADL website.
2. Sign up for the Bulletin through the AADL Email subscription list on the AADL website and read all updates.
3. Ensure Authorizer and Client information is up to date.
4. Ensure all items ordered on the specification sheet are required by the Client.

## Policy W – 28

### Tilt-in-Space Wheelchairs (Manual)

#### Policy Statement

##### Adults

Most tilt-in-space wheelchairs are not a standard benefit. Clients must be prepared to assume extra costs of a standard-plus benefit. It is expected that requests will be limited to those clients who are unable to be seated in an upright position, and those who have other seating needs which cannot be addressed by regular AADL “V” benefits.

An Adult Tilt-in-Space Request form must be submitted with the AADL 1251 Wheelchair form for all Tilt-in-Space Requests.

##### Pediatric (Under 18 Years Old)

Tilt-in-space wheelchairs are available as a standard benefit for children. Each request is subject to prior approval from the program. The request for approval must come from the Seating Clinic team following a Seating assessment. It is expected that requests will be limited to those clients who are unable to be seated in an upright position, and those who have other seating needs which cannot be addressed by regular AADL “V” benefits. A Pediatric Tilt-in-Space Request form must be submitted with the AADL 1251 Wheelchair form.

#### Procedure

##### Authorizers:

1. Assess clients for clinical need and ensure clients meet the AADL eligibility criteria.
2. Fill out the AADL 1251, Adult Tilt-in-Space Request forms and specification sheets as per Policy W-12.
3. When possible, do a follow-up with the client.

## Policy W – 29

### Refusal of the Equipment

#### Policy Statement

By signing the Declaration form the client is acknowledging that they are prepared to accept the equipment that has been authorized and ordered for them. During the authorization process the client has the opportunity to trial the equipment and ensures their home and living situation can accommodate the equipment.

#### Procedure

##### Authorizers:

If the client/family refuses to accept equipment that has been ordered for them, the authorizer should advise them of the following:

1. Clients are not eligible to be re-authorized until six months has elapsed.
2. If the family wants the equipment re-authorized they must send in a letter to AADL as well as a Quantity and Frequency (QFR) form filled out by the Authorizer for consideration.
3. If the client refuses to accept equipment a second time, the client will not be eligible again.

##### AADL:

1. Reviews the circumstances around the refusal of the equipment and considers the request.

## Policy W – 30

### Internal Transfers

#### Policy Statement

An Authorizer may transfer a standard wheelchair from a client who no longer needs the chair to a suitable client who needs an AADL wheelchair. See the “Z” manual for an example of the documentation that is needed.

For wheelchairs older than five years, prior approval is not needed to do an internal transfer. No documentation needs to be submitted to AADL. Please ensure that the client who no longer needs the wheelchair either has approval to get a new wheelchair or will not need this equipment before proceeding with the internal transfer.

Some restrictions apply:

- Any Standard-Plus, Upgrade, or Prior approval wheelchair must be returned to the recycle pool and cannot be internally transferred. Exception: Tilt-in-space wheelchairs may be internally recycled, but require the submission of a tilt-in-space form.
- The chair must be in good repair, be a good fit, and not need any parts changes. If this is not the case, the chair should be recycled in and an appropriate chair ordered for the client.

#### Procedure

##### Authorizers:

1. Ensure the wheelchair is in good condition prior to completing an Internal Transfer.
2. Submit an AADL 1251 and tilt-in-space form if needed to AADL.
3. If the wheelchair is older than five years, prior approval from AADL is not required.
4. When possible, conduct a follow-up assessment with the client.



## Policy W – 31

### Formal Recycle and Community Recycle

#### Policy Statement

The AADL program retains full ownership of all **formally recycled** equipment. The equipment is not for resale and must be returned to a recycle benefits vendor when the client no longer needs it, or when it has been replaced by AADL, or when the client moves out of Alberta or if for any other reason becomes ineligible for the benefit.

AADL-purchased equipment identified on the APL as “return to community” is still the property of the Crown. Although AADL does not formally recycle it, the client is expected to return the equipment to a local community recycle pool once it is no longer needed. It should not be resold.

AADL does not formally recycle manual wheelchairs older than five years from the purchase date. This applies to Pediatric and Adult standard and tilt-in-space wheelchairs. AADL will continue to repair and maintain wheelchairs that are internally transferred to clients so long as it is cost effective to do so.

#### Procedure

##### Authorizers/Clients:

1. If the equipment is recycled return the equipment to an AADL approved recycle vendor when it is no longer required by the client.
2. If the equipment is community recycle, cycle the equipment in the community.
3. If the client resides in a facility such as an assisted living or continuing care centre, the facility can re-allocate that piece of equipment to another resident.