

**Alberta Health**

**Alberta Aids to Daily Living  
Manual Wheelchair Benefits-Adult/Pediatric  
Policy & Procedures Manual**

April 1, 2016



## Revision History

Description	Date
<p>Amalgamated policies to reduce redundancy and created a separate Policy and Procedure Manual for power mobility.</p> <p>Updated format, added information and changed wording for clarity.</p> <p>Updated policies are highlighted.</p> <p>Separated guidelines for authorizers and product specific information – moved to W- APL and Authorizer Guideline resource on website.</p>	April 1, 2016.
<p>Updated format and wording changes</p> <p>Added procedural steps regarding no longer recycling manual wheelchairs more than five years old.</p>	July 1, 2014

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# Policy WM - 01

## Manual Wheelchairs Benefit Description

### Policy Statement

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

Wheelchairs are provided from the AADL recycle pool, previously used and refurbished. If the wheelchair requested is not available from the recycle pool, AADL purchases the wheelchair as new.

All wheelchairs funded by AADL are listed in the Approved Product List W-APL. Products on the APL are reviewed regularly through an AADL Product Evaluation Review, with timing around contract dates.

AADL retains full ownership of all formally recycled wheelchairs. See Policy WM- 08 Ownership and Responsibilities - Repairing and Returning AADL Wheelchairs.

Wheelchair Specification sheets are provided on the AADL website for wheelchairs funded by AADL and include available options and pricing funded by AADL. Options that the client is responsible to pay for are asterisked.

AADL Approved Recycle Vendors are listed on the Vendor List on the AADL website.

### **Manual wheelchairs:**

Manual wheelchairs are categorized as being “A”, “B”, “C”, “D” or “T” (tilt-in-space) based on wheelchair features and are provided according to user criteria. See Policy WM-11: Definitions for definition of each category.

AADL provides funding for wheelchairs using contract based pricing with AADL Recycle Wheelchair Vendors. Category D wheelchairs are distinct from other Categories as they are funded through a \$3,600.00 AADL grant and the client paying all costs above this amount. This grant is paid directly to the vendor once the wheelchair has been supplied to the client (service date).

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 description of wheelchair designations.

Not all AADL manual wheelchairs on the APL can accommodate a vent tray for a ventilator-dependent client, the availability of vent trays are indicated on the specific wheelchair’s specification sheet.

Clients who request and receive prior approval for a higher category wheelchair than they are eligible for may opt to upgrade. AADL will pay a maximum contribution **subject to clients paying the cost share** in addition to price above the maximum. Maximum contributions for each category are as follows:

- Category “A” eligible clients - \$1600.00
- Category “B” eligible clients - \$1900.00
- Category “I” eligible clients - \$1800.00

#### **Accessories, Codes, Seating Benefits:**

Information related to:

- Basic wheelchair accessories such as cushions, amputee boards, special backs and drop seats are found in the “V” manual.
- Specialized seating benefits authorized through a seating clinic are found in the “X” manual.
- Information on formal recycle, repairs, internal transfers and parts changes is found in the “Z” manual

#### **Exclusion List: Manual Seating Devices and Features not funded by AADL**

- Geri-chairs.
- Strollers
- Fixed height arm rests on wheelchairs
- Backpacks
- Monogramming
- Multiple choice or custom color options
- Performance tires
- Flat-free inserts in pneumatic tires when urethane tires are 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
- Cosmetic accessories
- Parts or repairs for privately-owned wheelchairs.
- Repairs on any component on a mobility device purchased privately.

## Policy WM – 02

### Manual Wheelchair Eligibility Criteria

#### Policy Statement

The Eligibility Criteria Policy assists clients, guardians, authorizers and vendors in identifying client eligibility to access manual and power wheelchair benefits.

Clients must meet general eligibility requirements found in AADL General Policies and Procedures on-line at: <http://www.health.alberta.ca/documents/AADL-Policy-Procedures.pdf>.

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 (e.g. outdoor use only).

Clients must trial the wheelchair prior to authorization for all manual wheelchairs.

Clients are responsible for temporary loans or rental equipment required while waiting for AADL funded equipment.

Clients are responsible for cost of repairs to any option 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 the W-APL

**Prior approval from the AADL Manager**, Mobility and Large Equipment is required for Category C, D, and Upgrade Wheelchairs.

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

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. See the APL for which wheelchairs can accommodate a heavy duty package and which are designated Heavy Duty.

The weight of oxygen tanks/ventilators should be added when computing the maximum weight capacity required.

Client weight must be stable (minimum 3 months) and documented on the authorization form.

Heavy Duty wheelchairs required for clients who are heavy users due to a clinically assessed condition and are below the weight maximum, require **prior approval from the AADL Mobility and Large Equipment Manager** to be eligible for this feature or type of wheelchair.

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.

Manual Tilt-in-Space funding for eligible children is provided as a standard benefit. A number of adult manual tilt-in-space wheelchairs are a standard-plus benefit and clients must be prepared to assume the associated extra costs.

Clients can request prior approval to upgrade to a higher category than they are eligible for at their own expense. AADL uses discretion in approving these upgrade requests.

AADL will provide a Category “A” back-up manual chair 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.

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 Benefit Specific Eligibility Criteria on the following page.

**Table 1: Manual Wheelchair Benefit – Category Specific Eligibility Criteria**

Eligibility Criteria	Category A	Category B	Category C (Prior approval)	Category D (Prior Approval)
<b>Ability to propel manual wheelchair (w/c)</b>	Dependent or independent	Independent	Independent	Independent
<b>Ability to ambulate with/without a cane(s), walker or crutches</b>	Has ability however requires W/C for safety & distance	No ability. May use cane/walker for transfer purposes.	No ability. May use cane/walker for transfer purposes.	No ability. May use cane/walker for transfer purposes.
<b>Minimum Activity Level</b>	Part time or full time use. Indoor and/or outdoor use.	Full time indoor and outdoor use. Active in community.	Full time indoor use and frequent outdoor use. Active in community.	Full time indoor use and frequent outdoor use. Active in community.
<b>High risk of Upper/Extremity (U/E) injury</b>	May or may not be at risk	Not a significant concern	Evidence of high risk	Evidence of high risk
<b>Other</b>	Part time user not eligible for One Arm Drive option.	Minimum 6 consecutive hrs sitting tolerance.	Adults only. Minimum 6 consecutive hrs sitting tolerance.	As per Cat.C. Non-progressive condition only.

**Table 3. Option Specific Eligibility Criteria**

Option/Feature	Criteria	Documentation required
<b>Recline</b>	Difficulties breathing Self Catheterizes Feeding impairment, need to extend trunk during feeding.	
<b>One Arm Drive</b>	Full time user	Document on 1251
<b>Tilt Option</b>	Limited to those clients who are unable to be seated in an upright position, Seating needs cannot be addressed by regular AADL “V” benefits.	Tilt-in-Space Form for Manual Wheelchairs.
<b>Oxygen Holder</b>	Client receives oxygen through AADL	Document on 1251



## Procedure

### Authorizers:

1. Confirm clients meet AADL eligibility requirements.
2. Confirm clients' previous benefit consumption:
  - Refer to the Wheelchair Benefits APL for quantity limits at:  
<http://www.health.alberta.ca/documents/AADL-Manual-W-Products.pdf>
  - Refer to the Interactive Voice Response at 780-415-8717 to determine benefits the client has received. See AADL IVR guide at:  
<http://www.health.alberta.ca/documents/AADL-Authorizer-IVR-Guide.pdf>
3. Refer to Policy W-06 Quantity and Frequency Limits if client is over quantity/frequency limit.
4. Provide clinical information and rationale on the power wheelchair assessment form and/or the AADL wheelchair authorization form to assist AADL in adjudicating client's eligibility.
5. Provide sufficient, detailed additional information related to Prior Approval requests directly on the authorization form or on a separate sheet if insufficient room to assist the Manager in adjudicating prior approvals. **Wait for response** from AADL on prior approval requests.
6. Inform clients of their eligibility status.

### Clients:

1. Confirm eligibility with authorizer.
2. Sign client declaration form.

### AADL:

1. Receives authorizations. Client Services confirms clients meet general eligibility requirements.
2. AADL benefit clerk logs authorizations in system and returns authorization forms to authorizers when authorizations are incomplete or ineligible. Authorizations are placed in queue for processing.
3. Benefit clerk confirms benefit specific eligibility and returns any authorizations that remain incomplete or ineligible. Forwards all prior approvals to AADL Manager, Mobility and Large Equipment.
4. AADL Mobility and Large Equipment Manager reviews requests for prior approval equipment and approves/denies. Passes valid authorizations back to assigned Benefit Clerk
5. Responds to telephone or email requests for information on wheelchair benefits eligibility and provides reference to the AADL website for further information at:  
<http://www.health.alberta.ca/services/aids-to-daily-living.html>

# Policy WM – 03

## Authorizer Qualifications

### Policy Statement

An Occupational Therapist (OT) or Physical Therapist (PT) who is approved as an AADL Program Authorizer for large recyclable equipment can authorize wheelchair benefits as part of their primary product range.

Authorizers must be aware of the products on the APL.

Authorizers may make adjustments and provide maintenance to AADL wheelchairs if they have the competence to do so.

### Procedure

#### Authorizer Applicants:

1. Complete the authorizer application form at:  
<http://www.health.alberta.ca/documents/AADL-Authorizer-Application.pdf>
2. Forward completed application with supporting documentation to AADL.
3. Attend the AADL Authorizer Course and sign the Declaration form.

#### AADL:

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

## Policy WM – 04

### Authorization Process – Manual Wheelchairs

#### Policy Statement

The authorization process policy promotes effective and efficient authorization of benefits.

The Authorization Process includes an assessment, trial, documentation and submission to AADL.

Wheelchair authorizations are valid when all authorization process steps and requirements have been met. Invalid or incomplete authorizations are returned to the authorizer by mail.

Authorization forms expire when the benefit has been provided to the client and the associated vendor claims have been processed or one year from the assessment date.

Assessments for wheelchairs funded by AADL must be completed and documented by the wheelchair authorizer on the Wheelchair Assessment Tool. The authorizer maintains a copy of the AADL Wheelchair Assessment Tool and must provide a copy upon requested from AADL for audit purposes.

Wheelchairs must be trialed by the client prior to authorization. Vendors are required to provide wheelchairs for trial purposes for up to three days.

All requests for manual wheelchair tilt feature on wheelchairs must be accompanied by a manual wheelchair tilt form found at: <http://www.health.alberta.ca/services/AADL-forms-docs.html>

If information is missing on the 1251 Form and/or specification sheets are not attached, AADL will order the wheelchair using a list of standard defaults. The lowest cost alternative is chosen whenever a generic part is available (e.g. adjustable tension backrest, seatbelt)

Features on the Wheelchair Specification Sheets considered standard and no charge to AADL will not be counted as duplication of Specialized Seating benefits (e.g. adjustable tension backs).

If the authorizer deems that a substitution wheelchair will not meet the client's needs, clinical documentation must be provided explaining why. See W10 Definition for Substitute Wheelchairs.

An authorization form is not required for wheelchair parts change requests. See Manual –Z for details on parts change processes.

AADL Wheelchair Authorization forms are available to order at:  
<http://www.health.alberta.ca/documents/AADL-Order-form.pdf>

**Prior Approvals from the Manager, Mobility and Large Equipment are required for:**

- Category “C” and “D” Manual Wheelchair Authorizations.
- Upgrade requests for clients preferring a higher category wheelchair than eligible for.
- Heavy Duty Wheelchairs for clients who are under the maximum weight capacity.

**Procedure**

**Clients:**

1. Fully participate in assessment and equipment trial.
2. Understand and be well informed about wheelchair choice and cost implications.
3. 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.
4. Read and understand the declaration form.
5. Sign Client Declaration form.

**Authorizers:**

1. Assess client and include a wheelchair trial in the home environment. Consider ability to transport wheelchair in vehicle.
2. Must arrange to have equipment returned at the end of the trial period. The client may not keep the trial equipment for ongoing use. See Trial Equipment Use Guidelines at: <http://www.health.alberta.ca/services/AADL-forms-docs.html>
3. Confirm client eligibility, including residence and past benefit consumption. Refer to Policy W-02 Eligibility Criteria.
4. Document assessment details on the AADL Manual Wheelchair Assessment form with clinical rationale to support the provision of the wheelchair’s specialty features.
5. Explain client eligibility to the client and clearly indicate which wheelchair(s) the client is eligible to receive.
6. Provide client choice of vendor according to Approved Wheelchair vendor list. Vendor name must be included on all wheelchair authorization forms.
7. Trial the equipment to ensure correct measurement and that it is appropriate for the client in their environment. Provide client with “AADL Trial Equipment Use” available on-line at: <http://www.health.alberta.ca/documents/AADL-Trial-Equipment-Use.pdf>. Category D Wheelchair clients may wait until after prior approval is received for steps 7-9).
8. Arrange for any trial equipment to be returned to the vendor.
9. Complete specification sheets for chosen wheelchair.
10. 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 APL to determine

additional/upgrade costs to the client. Indicate client has agreed to options not funded by AADL on the specification sheet.

- Clients prior approved to upgrade to a higher category – compute costs using the AADL maximum contribution **subject to clients paying the cost share** in addition to price above the maximum. Examples “Using the Math” can be found at the end of this section.
11. Address need for Prior Approval if required: determine clinical justification.
  12. Complete the AADL Wheelchair Authorization Form (1251) in its entirety including:
    - the catalogue number and model/brand of product
    - Required clinical rationale/client details to assist AADL in determining eligibility (e.g. manual muscle test results, U/E injury, and activity level).
    - Preferred vendor must be indicated.
    - Client’s street address – Box #'s are not accepted for delivery addresses.
    - **Section 5** – this section is provided so the Authorizer can add extra information. This may be to describe internal transfers, caregiver concerns, clinical information, state of wheelchairs that are not cost effective to repair, and/or why a comparable substitute wheelchair is not acceptable, Request for Category D funding etc.
  13. Sign the AADL Wheelchair Authorization Form (1251). (All clients including Category D)
  14. Obtain client understanding and signature on the authorization form. All boxes on consent portion must be checked off.
  15. Attach additional forms: Specification sheets for the chosen wheelchair model, manual tilt-in-space form if ordering this feature.
  16. Identify if request is for Category “D” Wheelchair funding. Specification sheets may be submitted by vendor once prior approval received.
  17. If benefit requested is over frequency limit, indicate approved Quantity and Frequency Request number on the authorization form. Refer to Policy W-06 Quantity and Frequency Limits.
  18. Advise clients with Category D authorizations they will need to sign a Category D Client Declaration form at the vendor in addition to the AADL Wheelchair Authorization Form (1251).
  19. Mail in Authorization Forms, with the exception of equipment orders for palliative or urgent requests which may be faxed.
  20. Distribute AADL form according to instructions at the bottom of the form.

**Vendors:**

1. Provide product knowledge and skills to assist the client and authorizer in selecting the AADL wheelchair that meets the client’s current and longer term clinically assessed needs.
2. Provide equipment for trial and assists authorizer with completing wheelchair specification sheets, ensuring the authorizer understands the purpose of current features of the wheelchair and potential for modifications in the future.
3. Receive vendor copy of authorization form and prior approval from AADL.

4. For Category “D” Wheelchair orders: Provide and have the client sign the “Category D Wheelchair Client Declaration Form”. Document client’s PHN on form and forward copy of the signed declaration form and completed specification sheets to AADL.

**AADL:**

1. Reviews wheelchair authorizations for compliance, completeness and accuracy.
2. Returns forms that are incomplete or incorrect to the authorizer.
3. Reviews authorization for eligibility. Returns authorizations that do not meet eligibility requirements.
4. Processes valid authorizations. See definitions for Valid Authorization.
5. Faxes Order Request to the preferred vendor.

**Examples: “Doing the Math”**

Maximum contributions for each category are as follows:

- Category “A” eligible clients - \$1600.00
- Category “B” eligible clients - \$1900.00
- Category “T” eligible clients - \$1800.00

**1. “A” category client prefers to upgrade to “B” category chair**

- \$2400 Cost of AADL chair after discount
  - \$1600 Minus AADL maximum contribution (more than 50%)
  - \$ 800 Client pays difference **plus** cost share (\$400) if not cost-share exempt
- Chair is Standard-Plus and AADL owns/maintains chair

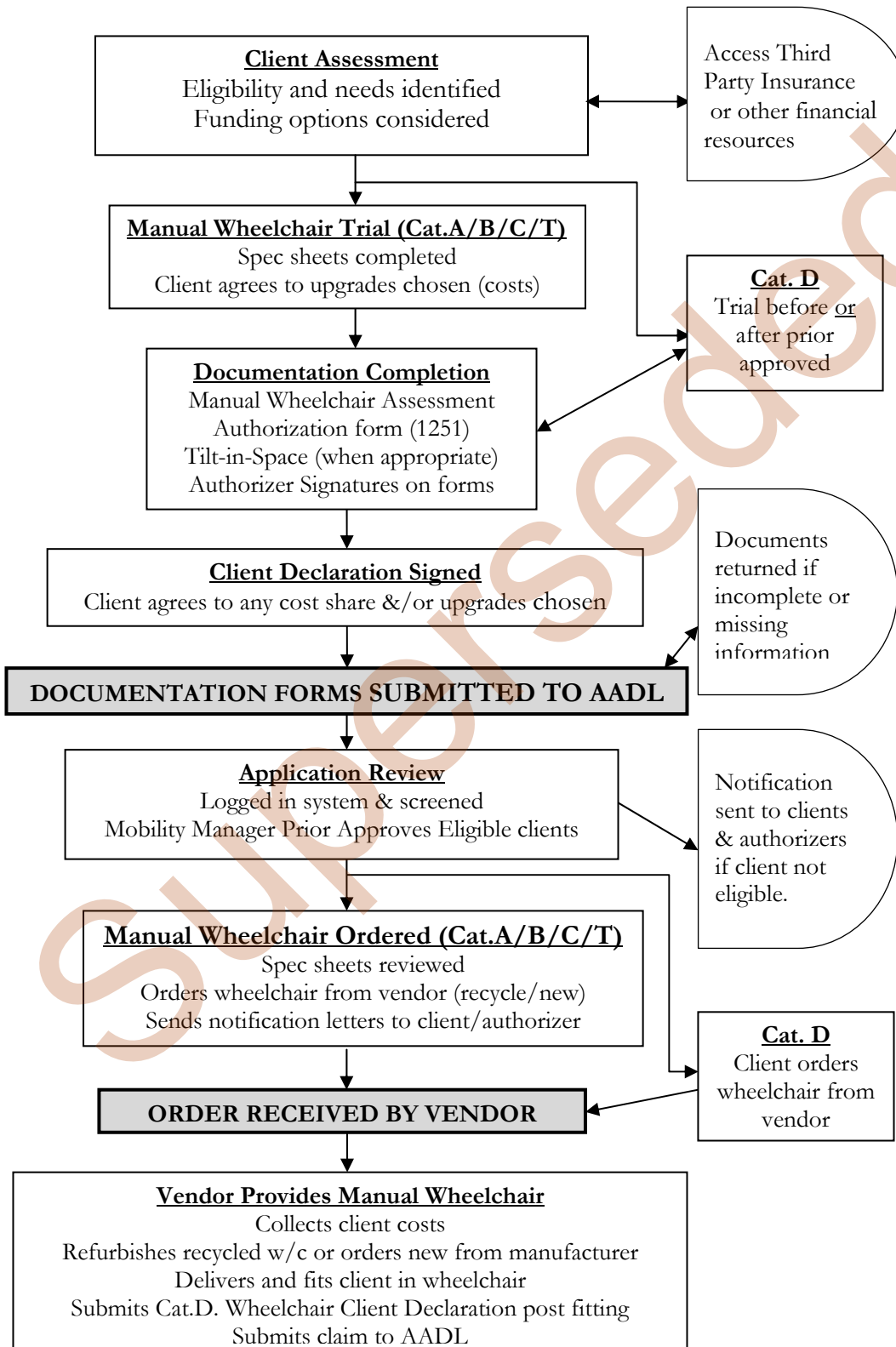
**2. “B” category client prefers to upgrade to “C” category chair**

- \$3700 Cost of AADL chair after discount
  - \$1900 Minus AADL maximum contribution
  - \$1800 Client pays difference **plus** cost share (\$475) if not cost-share exempt
- Chair is Standard-Plus, and AADL owns/maintains the chair

**3. Adult client prefers to upgrade to a “Tilt-in-Space” wheelchair**

- \$3500 Cost of AADL chair after discount
  - \$1800 Minus AADL maximum contribution
  - \$1700 Client pays difference cost share (\$450) if not cost-share exempt
- Chair is Standard-Plus, and AADL owns/maintains the chair

**Manual Wheelchair Process Flow Chart**



## Policy WM - 05

### Providing Manual Wheelchair Benefits - Supplier/Vendor

#### Policy Statement

AADL provides a clear and consistent process for providing clients with wheelchair benefits to promote effective and efficient provision of benefits.

AADL funded wheelchairs are provided through Alberta vendors who have a tendered contract with AADL. Vendors under this contract are considered Recycle Vendors and provide new equipment and recycle services.

The provision of wheelchair benefits includes the AADL Wheelchair Vendor Order, delivery and fitting 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 Recycle Vendors provide select wheelchairs to AADL clients from the W-Approved Product List (APL) authorized by an AADL authorizer.

Suppliers for the “W” APL are listed on the AADL Approved Vendor List found at <http://www.health.alberta.ca/documents/AADL-Manual-W-Products.pdf>.

Wheelchairs provided by the AADL program remain the property of the Government of Alberta until the equipment no longer meets the criteria for recycling at AADL and has been released. See Policy WM-08: 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 placed into the AADL Recycle Pool for AADL recycle. In these cases, the vendor may claim a Recycle In fee. See Policy WM-11: for definition of Custom Wheelchair.

The family of a client who deceased prior to delivery of the wheelchair benefit may write an appeal letter to the AADL Director to request cost-share reimbursement.

#### Procedure

##### Clients:

1. Pay any cost share portion and/or upgrade costs directly to the vendor.



2. Participate in final wheelchair fitting and confirm satisfaction.
3. Address any concerns immediately with the AADL authorizer and vendor.
4. Notify AADL if concerns are not resolved.
5. Assume responsibility for the care and maintenance of the wheelchair.
6. Accept responsibility for the cost associated with repair and maintenance if the wheelchair is an upgrade.

**Authorizers:**

1. Participate in final wheelchair fitting and confirm satisfaction.
2. Address any concerns immediately with the AADL client and vendor.
3. Notify AADL if concerns are not resolved.

**Vendors:**

1. Receives notification of prior approval/order for wheelchair benefit from AADL.
2. If wheelchair is in recycle pool, determine any refurbishing costs and submit work order to AADL for approval.
3. Receive approval to proceed with refurbishing recycled wheelchair (work order authorization) or providing new (wheelchair authorization)/
4. Collect any cost-share portion and/or upgrade costs from the client prior to ordering the wheelchair or parts.
5. Order the wheelchair/parts and fax copy of order form to AADL indicating the Serial Number of the wheelchair in stock or that the order is now on back order
6. Affix AADL stickers (Not for Resale, and Year) to wheelchair once at vendors.
7. Set up wheelchair according to specifications, provide delivery and fitting of wheelchair or notify therapist that the wheelchair is being delivered.
8. Address any concerns at time of delivery and advise AADL if concerns cannot be addressed immediately.
9. Submit claim to AADL for payment for AADL funded specifications and options.

**AADL:**

1. Maintains a list of AADL Approved Recycle Wheelchair Vendors.
2. Provides authorization for vendor work orders over \$300.00 to refurbish recycle wheelchairs.
3. Assigns wheelchair to AADL client; tracks wheelchair location and associated work orders.
4. Receives and pays claims from AADL Recycle Vendor.
5. Processes eligible Director Appeal Letters for cost-share reimbursements.

## Policy WM – 07

### Manual Wheelchair Quantity and Frequency Limits

#### Policy Statement

AADL provides clear and consistent guidelines and procedures for quantity and frequency limits for wheelchair benefits to ensure transparency, consistency and accountability.

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 “D” wheelchairs have a Frequency Limit of one in six years which is strictly enforced.

Maximum of one oxygen holder is funded for eligible clients.

A Quantify and Frequency Request (QFR) is 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 Z-05 Parts Changes: Formally Recycled Equipment and Wheelchairs.

QFR's must be submitted by an AADL Authorizer for Wheelchair Benefits.

Criteria for submitting a QFR for Wheelchair Benefits is summarized in Table 1: When to Submit a QFR for Wheelchair Benefits.

**Table 1. When to Submit a QFR for Manual Wheelchair Benefits**

Benefit	W/C Age	Current Equipment	Client condition	QFR	Documentation
Wheelchair (Manual)	any	Cannot be reconfigured with parts change	Significant Change	Yes	<ul style="list-style-type: none"> <li>• QFR with rationale</li> <li>• W/C Replacement Form</li> </ul>
	over 6 yrs. Cat. D	No longer meets needs	Change in condition	Yes	<ul style="list-style-type: none"> <li>• QFR with rationale</li> <li>• W/C Replacement Form</li> </ul>
	any	Not able to add tilt option	Tilt required over a year later due to significant change	No	<ul style="list-style-type: none"> <li>• Rationale on 1251</li> <li>• Tilt-in-Space form</li> </ul>
	any	Cannot be reconfigured with parts change	Pediatric growth Change more than 2" in seat size	No	<ul style="list-style-type: none"> <li>• Rationale on 1251</li> <li>• Client measurements</li> <li>• W/C Replacement Form</li> </ul>
	under 10 yrs. Cat. A,B,C,T	Not repairable	No change	No	<ul style="list-style-type: none"> <li>• Vendor repair estimate</li> <li>• Rationale on 1251</li> </ul>
	over 6 yrs. Cat. D	Not repairable	No change	No	<ul style="list-style-type: none"> <li>• Repair history (hx.)</li> <li>• Rationale on 1251</li> </ul>
	over 10 yrs.	Not repairable	No change	No	<ul style="list-style-type: none"> <li>• Rationale on 1251</li> <li>• Vendor repair estimate not required</li> </ul>
Parts Change	any	Can be reconfigured with parts	Significant change in less than 6 mos.	Yes	<ul style="list-style-type: none"> <li>• QFR with rationale</li> </ul>
	any	Can be reconfigured with parts	Significant change over 6 mos.later.	No	<ul style="list-style-type: none"> <li>• Vendor estimate/work order with rationale</li> </ul>

AADL will only consider QFR's 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.
- 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

### Clients:

1. Participate in reassessment.
2. Understand and agree to any cost implications prior to signing the QFR form.

### Authorizers:

1. Refer to the AADL QFR General Policy and Process at:  
<http://www.health.alberta.ca/documents/AADL-Policy-Procedures.pdf>.
2. Assess client and determine if wheelchair can be modified or if a replacement is required.
3. If the vendor advises that AADL has deemed the wheelchair not cost effective to repair or modify, complete a Wheelchair Replacement Form.
4. Determine age of wheelchair to inform next steps and if QFR is required. Refer to sticker on wheelchair or contact AADL for age of wheelchair.
5. Refer to Table 1. When to Submit a Wheelchair Benefits QFR.
6. Advise clients of quantity and frequency limits and associated costs of replacing a wheelchair.
7. Complete QFR form found at: <http://www.health.alberta.ca/services/AADL-forms-docs.html>
8. Obtain client understanding and signature on the form. Advise client of next steps.
9. Fax in QFR form to AADL with wheelchair replacement form.
10. Wait for QFR decision letter by fax and if approved, add QFR reference # to 1251 form. Submit the completed 1251 with the wheelchair specs to AADL.

### Vendors:

1. Receive requests to evaluate AADL wheelchair for costs to repair or modify.
2. Evaluate and determine costs. If costs are over \$300.00 or the client is on the “Max List” submit a work order and cost estimate to AADL for consideration prior to beginning any work.
3. Contact AADL directly by phone if wheelchair repair is urgent.
4. Advise authorizer when work order repairs have been denied by AADL and to proceed with client reassessment. Advise authorizer of age of wheelchair in case QFR is required.

### AADL:

1. Provides information to authorizers on age of wheelchair.
2. Reviews and adjudicates QFRs.
3. Returns QFRs that are incomplete or have insufficient information.
4. Provides a response to the client and the Authorizer.
5. Records decision on client’s file.

## Policy WM – 08

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

#### Policy Statement

AADL provides clear and consistent guidelines and procedures for repairing and returning AADL owned wheelchairs to ensure transparency, consistency and accountability.

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 Recycle Vendors participate fully in the AADL recycle program including repairs and maintenance services.

#### **Returning wheelchairs:**

Manual wheelchairs are returned to an AADL Recycle Vendor when:

- The client moves out of Alberta, or for any other reason becomes ineligible for the benefit; or
- The wheelchair is no longer needed by the client.

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:**

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

A Quantity and Frequency Request (QFR) is required for repairs or parts 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 to the maximum of \$450.00 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 W10: Definitions for descriptions of upgrade and Category D wheelchairs.

Clients with Category "D" wheelchairs need to keep a record of maintenance and repair history if planning to request funding to replace their wheelchair in the future.

See "Z" Manual for further information on AADL repairs equipment/wheelchair including generic and manufacturer codes.

## **Procedure**

### **Clients:**

1. Ensure reasonable care and maintenance of AADL-owned wheelchairs.
2. Responsible for replacement of any wheelchair that is lost, stolen, or damaged due to misuse or accidents. AADL program recommends client's insure the wheelchair through a private homeowner's/tenant insurance policy.
3. Returns AADL owned wheelchair to AADL vendor when no longer needed by client.

### **Authorizers:**

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

### **Vendors:**

1. Review care and maintenance of AADL-funded wheelchairs with clients.
2. Refer to client Max List to determine client eligibility for repairs. (See WM-11 definitions for Max List.)
3. Repair AADL owned wheelchairs.
4. 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.
5. Notify the client of the price differences between generic parts and manufacturer parts.
6. Fax in Repair Work Order to AADL and obtain prior approval for all wheelchair repair work orders over \$300.00 prior to completing the work.
7. Contact AADL by phone or email if repair is urgent.
8. Collects any cost share or upgrade costs from the client prior to completing the repair.

9. Assists client when wheelchair is no longer needed in determining if wheelchair must be returned to AADL recycle.
10. Assess AADL owned wheelchairs no longer required by the client for suitability for AADL recycle program.
11. Update AADL if client status has changed – e.g. moved.

**AADL:**

1. Provides funding assistance for repairs and maintenance to AADL-owned wheelchairs.
2. Reviews and prior approves eligible cost effective repair work orders over \$300.00.
3. Reviews eligible requests to replace Category “D” wheelchairs. AADL Equipment Specialist reviews the Category “D” wheelchair maintenance and repair history to determine if wheelchair has been maintained and is no longer cost effective to repair.
4. Provides work order authorization to vendor for repairs over \$300.00.
5. Informs the vendor if a wheelchair has been deemed irreparable or not cost effective to repair by AADL.
6. Tracks wheelchair repairs, returns and location status.

# Policy WM – 09

## Refusal of the Equipment

### Policy Statement

AADL provides a Refusal of Equipment Policy to ensure transparency and accountability.

Clients who refuse equipment are not eligible for AADL funding for the same benefit for a minimum of six months. By signing the Declaration form the client acknowledged they were prepared to accept the equipment that was authorized and ordered for them. During the authorization process the client agreed to trial the equipment and ensured their home and living situation accommodated the equipment.

Clients who request funding for the benefit six months after refusing the same type benefit must submit a letter addressed to AADL 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.

Clients who have refused equipment are only eligible for equipment from AADL recycle inventory.

The authorizer completes a Quantity and Frequency Request for the item that was refused and placed back in the recycle pool.

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

### Procedure

#### Clients:

1. Participate in reassessment with authorizer.
2. Write letter to AADL describing circumstances and providing assurances described above.

#### Authorizers:

1. Advise client of the risk of refusal of equipment. Clients are not eligible to be re-authorized until six months has elapsed.
2. 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.
3. Complete Quantity and Frequency (QFR) form, attach letter and submit to AADL.



**AADL:**

1. Reviews the circumstances around the refusal of the equipment
2. Advises client and authorizer of decision.

Superseded

# Policy WM – 10

## Internal Transfers

### Policy Statement

An Authorizer may transfer a standard 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 client.

AADL prior approval is required for all internal transfers.

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

Repairs/parts changes within the first six months after the wheelchair has been internally transferred do not require a Quantity and Frequency Request (QFR). Repairs/parts changes over \$300.00 do require prior approval.

See Z- Manual for additional information on Internal Transfers.

### Procedure

#### Authorizers:

1. 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.
2. Ensure the wheelchair is in good condition prior to requesting an Internal Transfer.
3. Complete an AADL Wheelchair Authorization Form (1251) (and tilt-in-space form if needed).
4. Submit documents to AADL by mail.
5. Transfer wheelchair to new client when approved (AADL approval letter received).
6. Follow-up with client and confirm suitable fit and condition of wheelchair.
7. Request vendor submit quote for minor repairs/parts changes to AADL if required.

# Policy WM – 11

## Definitions

### **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.

### **Automatic Defaults**

Automatic defaults are specifications/ features that AADL uses when information is missing on the 1251 Form and/or specification sheets are not attached. A List of Standard Defaults can be found on the AADL website at: <http://www.health.alberta.ca/services/AADL-forms-docs.html>

### **Back-up Wheelchair**

A back-up wheelchair is a basic manual wheelchair (Category “A” or “T”) 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 those 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 charge – as listed on the spec sheet and approved by AADL.

### **Dependent Full-time User**

A dependent full-time use 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, however is unable to self-propel long distances (e.g., to dining room in nursing home) or outside.

### **Equipment Trial**

An equipment trial is a trial that involves the client and caregiver trying wheelchairs to determine which one is appropriate. The trial must include accessing the home entrance and rooms, any vehicle the wheelchair will be transported in, environments where the chair will be used such as school/work/community, and outdoors (especially in rural setting). 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 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 when up during the day for a minimum of 6 consecutive hours. A full-time user may use another mobility device for transferring, however 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. While this is a very economical and efficient transfer, some restrictions apply. See “Z” manual for instructions and sample of internal transfer documentation.

### **Max List**

The Max List is a list of AADL clients who have reached or are near their repair allotment maximum for the benefit year. AADL provides vendors with a max list on a regular basis.

### **Palliative Client**

A client is deemed palliative if 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, or 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 the process that occurs when a wheelchair is returned to a recycle vendor.

Recycle Out is the process that occurs when AADL assigns a wheelchair from the recycle pool to go to a client. The recycle out wheelchair is refurbished prior to being sent out to the client. See “Z” manual for further information on Recycle Services.

### **Recycle Pool**

The Recycle Pool includes all the equipment owned by AADL that are tracked in the equipment inventory. AADL equipment is stored at various recycle vendors’ locations in the province. See “Z” manual for further information on Recycle Services.

### **Recycle Vendor**

A recycle vendor is a vendor who has a contract to provide new and recycled wheelchairs for AADL. AADL Recycle Vendors are active in recycling AADL inventory, refurbishing and repairing 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 (SP) Wheelchairs**

Standard Plus wheelchairs are (any category) 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 these standard-plus benefit requests. AADL contributes a fixed amount towards the purchase of the SP wheelchair based on client eligibility. The “SP” wheelchair is considered AADL owned as AADL has paid more than 50% of the cost of the wheelchair. AADL owns and provides funding towards maintenance and repairs of SP 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 spec sheets found on the AADL website. Upgrade costs are separate from the term Upgrade Wheelchair. See definition of Upgrade Wheelchair.

### Upgrade Wheelchairs

Upgrade wheelchairs are AADL funded (any category) wheelchairs that are considered owned by the client. These include Category “D” wheelchairs and any wheelchair that the client pays more than half for (excluding their cost share contribution). The client is fully responsible for the costs of any maintenance or repairs on Upgrade Wheelchairs. See Policy WM-04 Authorization Process to determine process for calculating client costs.

### Valid Authorization

An authorization form is considered valid when information on the form is correct and completed in full, all necessary clinical rationale is documented, the form is signed by the authorizer and client, the client meets the relevant eligibility criteria and any requisite prior approval has been provided.

### Wheelchair Categories

Manual wheelchairs are categorized as being “A”, “B”, “C”, “D” or “T” (tilt-in-space) based on wheelchair features and are provided according to user criteria.

**Category “A”** is a standard weight wheelchair designed for part or full time use.

**Category “B”** 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”** 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.

**Category “D”** is an ultra-lightweight wheelchair composed of titanium or other ultra-light material. Category “D” wheelchairs are not listed on the APL and are funded using a different funding model.

**Category “T”** is a wheelchair that has a tilt-in-space feature.