



# Manual wheelchair benefits

Alberta Aids to Daily Living  
Program Manual Section WM

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Alberta Health  
Alberta Aids to Daily Living  
ATB Place North, 11th Floor  
10025 Jasper Avenue NW  
Edmonton, Alberta T5J 1S6

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## Policy WM – 01

### Manual Wheelchair Benefit Description

#### Policy Statement

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

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

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

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

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

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

#### Manual wheelchairs

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

- category A manual wheelchair (includes tilt-in-space)
- category B manual wheelchair
- category C manual wheelchair
- grant for manual wheelchair – upgrade or category D
- recycled manual wheelchair (all category A)
- category A high weight/heavy duty manual wheelchair

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

#### Upgrade/Grant wheelchairs

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

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

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

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

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

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

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

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

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

### **Exclusion list**

#### **Equipment not funded by AADL**

- geriatric (“Geri”) chairs
- scooters
- strollers

#### **Features not funded by AADL**

The following items may be selected on the manufacturer’s specification sheets when ordering, but will be client cost.

- 3” roller blades on adult chair frames
- aluminum caster hubs when composite is available
- backpacks
- cosmetic accessories
- crutch/cane/cup holders
- fixed-height arm rests on wheelchairs
- flat-free inserts in pneumatic tires when urethane tires are available
- high-performance wheels
- monogramming
- multiple choice or custom color options (not available at client cost on Category A chairs)
- parts or repairs for private-owned or grant wheelchairs
- performance tires
- power tilt
- repairs on any component on a mobility device purchased privately
- seat belts other than approved generic ones
- transit tie downs
- tire pumps
- touch up paint

**Note on transit tie-downs**

AADL does not provide funding for transit tie-downs. There are two types of transit tie-down: Occupied (the client remains in the wheelchair during transport) and non-occupied. Occupied tie-downs have been rigorously tested and usually have a cost associated with them. The most common occupied tie-down is WC-19.

Clients are responsible for exploring their transport options and determining any requirements needed. AADL encourages authorizers and clients to contact municipal transportation authorities for more information on wheelchair transportation requirements.

## Policy WM – 02

### Eligibility Criteria

#### Policy Statement

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

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

Clients who require a wheelchair for part-time or full-time use are eligible for manual wheelchair benefits. Clients who require a wheelchair for occasional use are not eligible for a part-time category A wheelchair. These clients should be directed to obtain a transport chair. If a standard wheelchair is required, the client is only eligible for a manual wheelchair from the recycle inventory.

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

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

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

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

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

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

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

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

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

Clients whose weight exceeds the standard wheelchair maximum weight capacity are eligible for either a heavy-duty package on a wheelchair or a heavy-duty wheelchair. The weight of oxygen tanks/ventilators should be added when computing the maximum weight capacity required. If client is within 10 per cent of the maximum weight capacity, the heavy-duty option should be considered. See Manual Wheelchairs: Heavy Duty in Alberta Aids to Daily Living Approved Product List W – Wheelchairs: Manual and Power for information on which wheelchairs can accommodate a heavy-duty package and which are designated as heavy duty.

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

For clients who have received power wheelchair funding, AADL will provide funding for a category A back-up manual wheelchair from the recycle inventory only. A back-up wheelchair is for use when the power wheelchair is not working or has to be left at the vendors for repairs or maintenance. It is not intended for part-time use.

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



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

**Table 1**

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

Eligibility criteria	Recycle only manual wheelchair	Category A	Category B	Category C	Category D (prior approval)
Ability to propel manual wheelchair	Dependent or independent	Dependent or independent	Independent	Independent	Independent
Ability to ambulate with/without a cane(s), walker, crutches or with lower limb prosthetic*	Client requires a wheelchair occasionally as client either walks or has power wheelchair	Has ability to ambulate; however, requires wheelchair for safety and distance	No ability. May use cane or walker for transfer purposes	No ability. May use cane or walker for transfer purposes	No ability. May use cane or walker for transfer purposes
Minimum activity level	Occasional use, less than daily	Part-time (less than six hours per day) or full-time use (greater than six hours per day)  Indoor and/or outdoor use	Full-time indoor and outdoor use (greater than six hours per day).  Active in community	Full-time indoor use (greater than six hours per day) and frequent outdoor use  Active four out of seven days in community	Full-time indoor use (greater than six hours per day) and frequent outdoor use.  Active in community
High risk of upper extremity injury	N/A	May or may not be at risk.	Not a significant concern.	Evidence of high risk.	Evidence of high risk.
Other	Clients may request recycle only for financial or other reasons	Part-time user. Not eligible for one-arm drive option  All category A users must accept a comparable recycle match if found.	Minimum six consecutive hours sitting tolerance	Adults only  Minimum six consecutive hours sitting tolerance	As per category C  Non-progressive condition only

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

**Table 2**

**TABLE 2: OPTION SPECIFIC ELIGIBILITY CRITERIA**

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

## **Procedure**

### **Authorizers:**

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

### **Clients:**

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

### **Alberta Blue Cross:**

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

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## Policy WM – 03

### Authorizer Qualifications

#### Policy Statement

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

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

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

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

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

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

#### Procedure

##### Authorizer Applicants:

- Must already be an AADL authorizer. See AADL Program Manual Section GN. Complete the primary Authorizer Application form at: <https://formsmgmt.gov.ab.ca/Public/AADL2218.xdp>
- Complete the Manual Wheelchair and Basic Seating Needs Authorizer Application form available at: <https://formsmgmt.gov.ab.ca/Public/AADL13153.xdp>
- Forward completed application with supporting documentation to AADL.

##### AADL:

- Provide authorizer training for new authorizers.
- Review application for secondary product ranges and approve authorizers who have completed all requirements and meet eligibility criteria.
- Add product range to the authorizer's product range list and notify Alberta Blue Cross.
- Monitor authorizer activities and determine compliance with policies and procedures.

## Policy WM – 04

### Authorization Process

#### Policy Statement

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

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

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

When providing a wheelchair to a client, the recycle inventory is searched first using the Generic Specifications form. See Policy ZR – 03 Recycle-out in AADL Program Manual Section ZR – Recyclable Benefits: Recycle Vendor Service for the procedure.

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

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

#### Procedure

##### Authorizers:

- Assess client in the home environment. Consider the ability to transport wheelchair in vehicle.
- Confirm client eligibility, including residence and past benefit consumption. Refer to Policy WM – 02 Manual Wheelchair Eligibility Criteria and the patient inquiry screen on the Alberta Blue Cross online health portal to check product consumption.
- Document assessment details on the AADL Manual Wheelchair Assessment form, or comparable form, with clinical rationale to support the provision of the wheelchair's specialty features.
- Explain client eligibility to the client and clearly indicate which wheelchair(s) the client is eligible to receive. Refer to GN – 08 Explaining Policies and Procedures to Clients in AADL Program Manual Section GN – General Policies and Procedures for procedure.
- Explain to client that the wheelchair will come through the recycle inventory first. If not available there, provide the client a choice of vendor according to the wheelchair approved vendor list.
- If providing a wheelchair through an internal transfer, see Policy ZR – 05 Recycle Equipment Internal Transfers in AADL Program Manual Section ZR – Recyclable Benefits: Recycle Vendor Service for complete details.
- Complete and submit the generic specification form to the recycle vendor to search the recycle inventory. See Policy ZR – 03 Recycle-out in AADL Program Manual Section ZR – Recyclable Benefits: Recycle Vendor Service for recycle-out process.
  - This is not required for internal transfers.
- Obtain client signature on the Client Consent form.
- Complete the Manual Wheelchair Benefits Eligibility Summary form for category A (includes tilt), category B, category C heavy-duty or grant benefits.
- Submit authorization on the Alberta Blue Cross online health portal for either a recycle or new wheelchair.
  - Upload corresponding eligibility summary form, Client Consent form and confirmation from recycle vendor that requested equipment is not available through recycle (if applicable).

- Enter the recycle request form number in the mandatory box. If this is an internal transfer, write “InternalTransfer” (with no space) in the box.
- Determine client costs and ensure the client understands and agrees to any costs they are responsible for.
  - Refer to the specific wheelchair specification sheet and approved products list to determine additional/upgrade costs to the client. Indicate client has agreed to options not funded by AADL on the specification sheet.
- Address need for prior approval if required. Determine clinical justification. Provide sufficient, detailed additional information related to prior approval requests directly on the authorization to assist the adjudicating of prior approvals. Wait for a response from Alberta Blue Cross on prior approval requests.
- Advise client of cost-share amount.
- Notify vendor that the approved authorization is available on the online health portal and order equipment.

**Clients:**

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

**Recycle Vendor:**

- Receive generic specification forms from authorizers.
- Search the recycle inventory database for matches.
- Provide written confirmation to authorizers of a match or no match.
- If a match is available, review the authorization on the Alberta Blue Cross online health portal and confirm with authorizer the cost-share amount.
- Collect cost-share, refurbish wheelchair and set it up as per authorizer’s request.
- See Policy ZR – 03 Recycle-out in AADL Program Manual Section ZR – Recyclable Benefits: Recycle Vendor Service for recycle-out process.

**Vendors:**

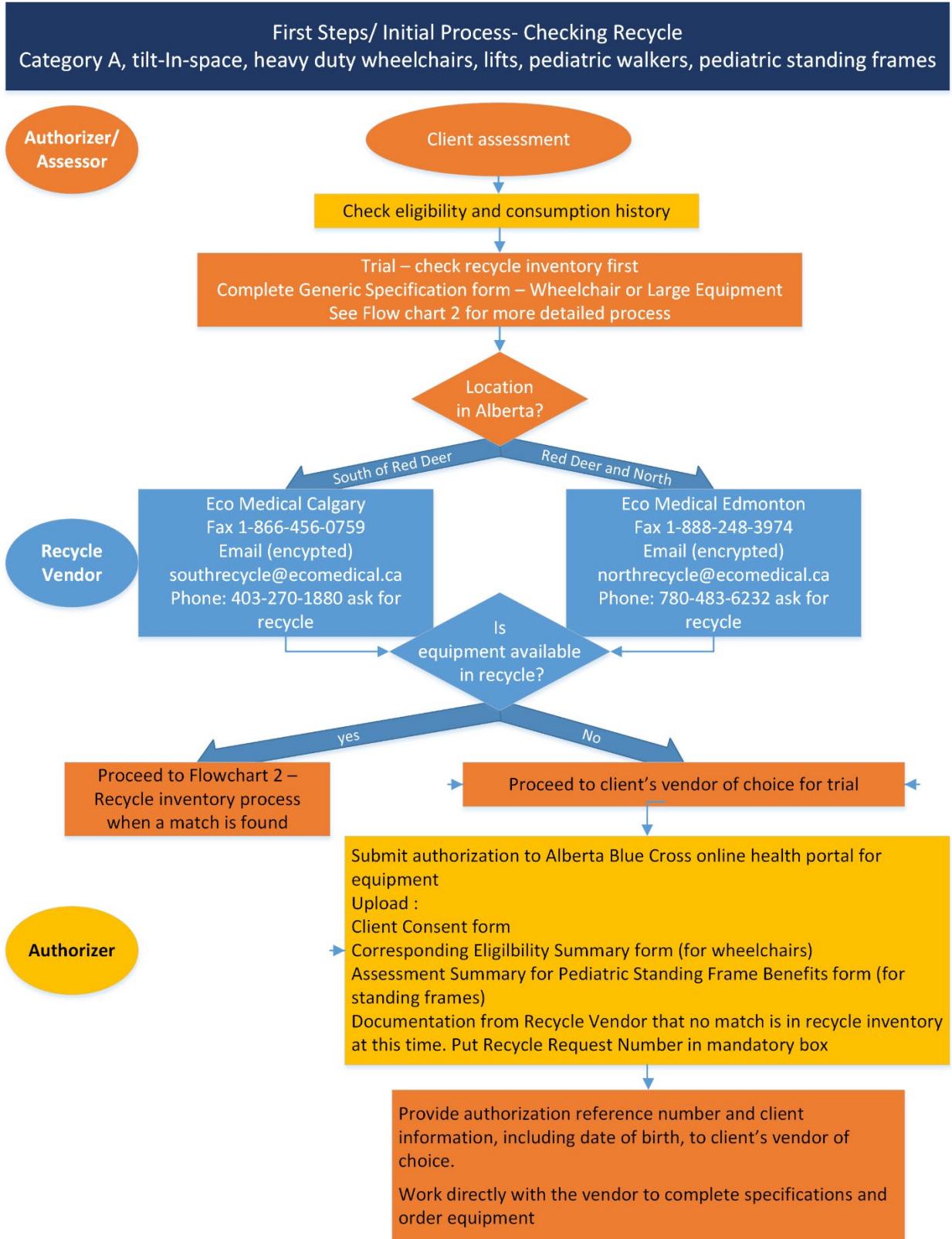
- Receive notice from the authorizer of authorization on the online health portal and provides equipment.
- Provide equipment for trial if requested, and assist authorizer with completing wheelchair specification sheets. Ensure the authorizer understands the purpose of current features of the wheelchair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

**Alberta Blue Cross:**

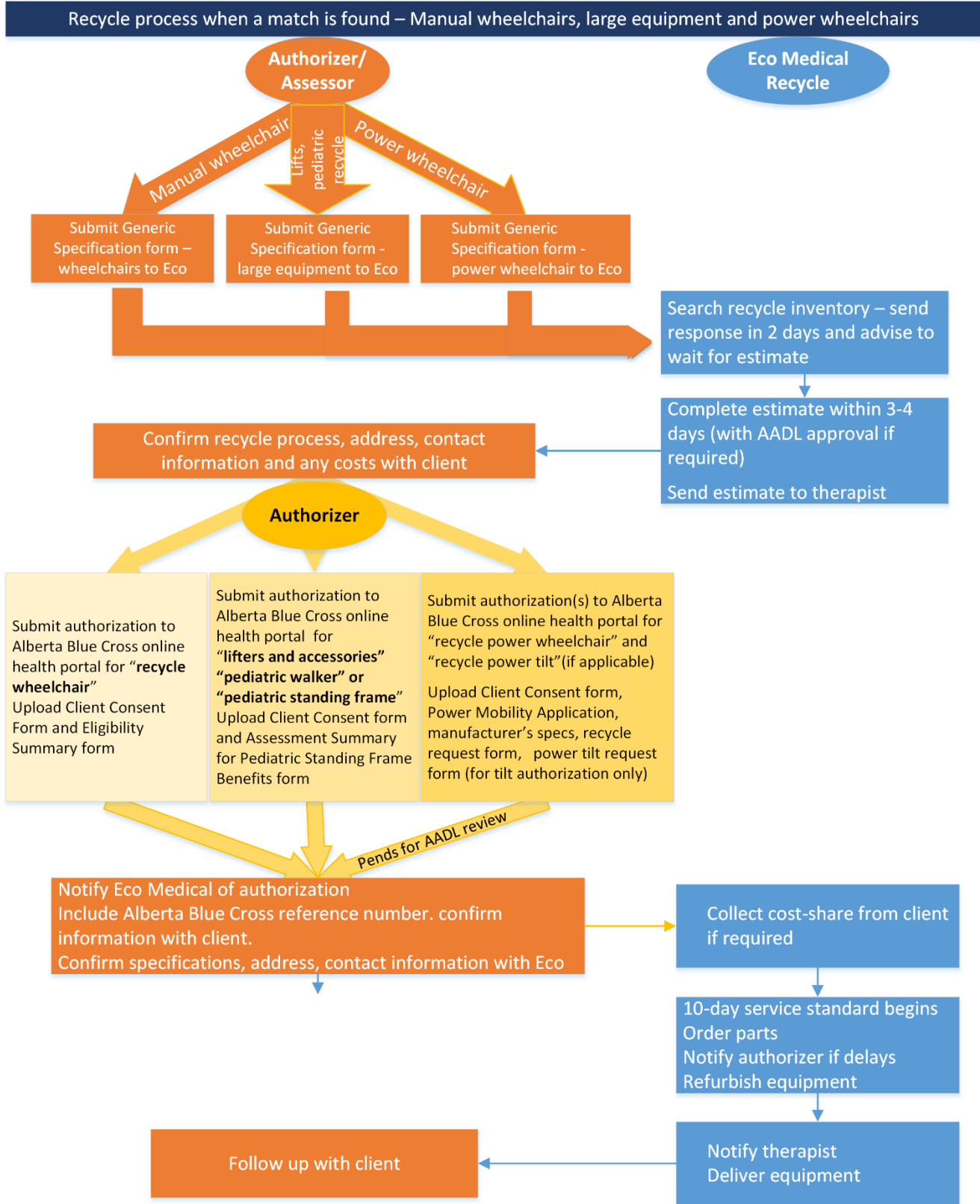
- Review wheelchair authorizations for compliance, completeness and accuracy.
- Review authorization for eligibility. Deny authorizations that do not meet eligibility requirements.
- Process valid authorizations. See Valid authorization in Policy WM – 11 Definitions.

# Figure 1

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



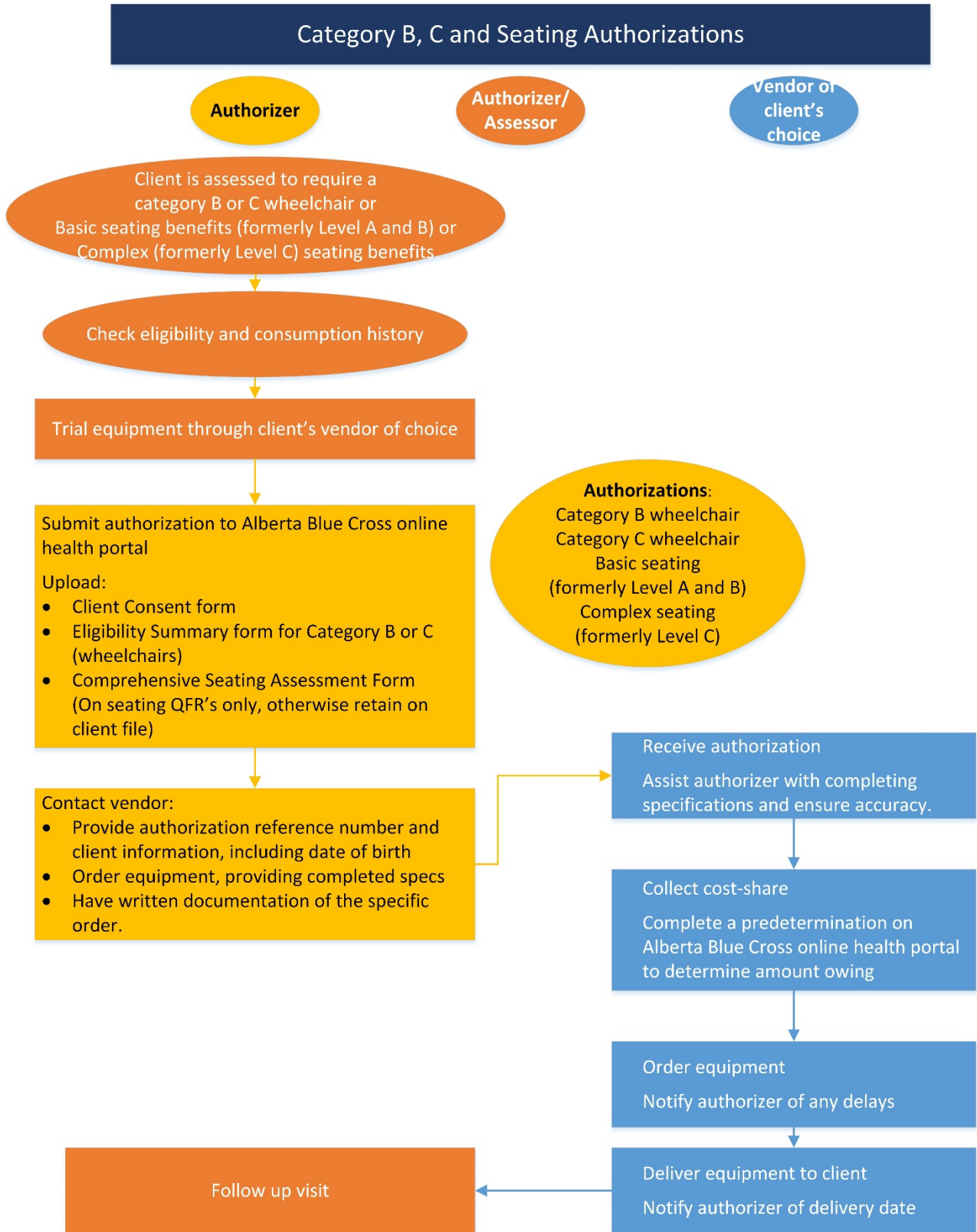
**Figure 2**  
**Recycle Equipment Process**





**Figure 3**

Category B, C and Grant Manual Wheelchair Process





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## Policy WM – 05

### Providing Manual Wheelchair Benefits

#### Policy Statement

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

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

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

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

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

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

#### Procedure

##### Authorizers:

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

##### Clients:

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

##### Recycle Vendor:

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

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

- Submit claim on the online health portal.

**Vendors:**

- Receive notification of authorization and order for wheelchair benefit from authorizer.
- Obtain written confirmation of approval from client prior to ordering.
- Collect any cost-share portion or deposit and/or upgrade costs from the client prior to ordering the wheelchair.
- Order the wheelchair.
- Affix AADL stickers (“Not for Resale” and “Year”) to wheelchair once at vendors.
- Set up wheelchair according to specifications, provide delivery and fitting of wheelchair or notify therapist that the wheelchair is being delivered.
- Collect remaining cost-share amount based on a pre-determination on the online health portal.
- Address any concerns at time of delivery and advise AADL if concerns cannot be addressed immediately.
- Submit claim to Alberta Blue Cross online health portal for payment for AADL-funded specifications and options. Keep order on file for auditing purposes.
- 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.
  - Vendors may not submit claims for equipment that is not delivered to clients. The vendor must return any cost share or deposit collected to the client or their families/representatives as soon as possible.
  - Custom-made wheelchairs that cannot be stopped or returned to the manufacturer must be sent to the AADL recycle vendor. See Policy WM – 11 Definitions for the definition of custom wheelchair. The vendor must refund the cost-share portion to the client. Once cost-share is refunded, the vendor can request full payment for the chair by submitting request to Alberta Blue Cross with confirmation the above has been completed.

**Alberta Blue Cross:**

- Receive and pay claims from AADL recycle vendor or AADL wheelchair vendors.
- If client deceased prior to receiving the wheelchair and the vendor requests reimbursement for a custom chair, Alberta Blue Cross will notify the recycle vendor to expect the recycle-in.

**AADL:**

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

## Policy WM – 06

### Quantity and Frequency Limits

#### Policy Statement

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

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

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

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

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

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

AADL will only consider replacement of a wheelchair for the following reasons:

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

Clients are not automatically eligible for new equipment when the frequency period ends. However, once the frequency period ends, quantity and frequency review requests are not required.

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

#### Requests for early parts changes

If an AADL-owned manual wheelchair requires a parts change within one year of the client receiving the wheelchair, vendors must submit a parts change/repair authorization request. If AADL has confirmed that the wheelchair is not cost-effective to repair, the wheelchair may not be replaced. AADL will confirm with the vendor if they are able to reconfigure the wheelchair with a parts change.

#### Table 3

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

AADL owned or grant	Wheelchair age	Adult or child	Condition change?	AADL confirms cost-effective to repair/reconfigure?	Action	Comments
Grant	< 5 years	Adult	Yes	Yes	N/A	Not eligible as per the grant agreement
Grant	> 5 years	Adult	Yes	No	Submit an authorization	Must be either condition change or not cost effective to be eligible
			No	Yes		
AADL-owned	< 5 years	Adult	Yes	Yes	Submit a QFR request	Must have a condition change or wheelchair is not cost-effective to repair
			No	Yes		
AADL-owned	< 5 years	Adult	Yes, client requires tilt	N.A	Submit an authorization	Use the early replacement authorization stream. One-time use for client lifetime. Clinical rationale required.
AADL-owned	> 5 years	Adult	Yes	Yes	Submit an authorization	Must have a condition change or wheelchair is not cost-effective to repair
			No	Yes		
AADL-owned	> 10 years	Adult	No	No	Submit an authorization	No confirmation required
AADL-owned	< 5 years	Child	Yes, growth more than 2"	Yes	Submit an authorization	Use the early replacement for growth authorization stream. One-time use for client lifetime. Clinical rationale required.
AADL-owned	< 5 years	Child	Yes, other than growth	Yes	Submit a QFR request	Required if the growth authorization stream has already been used for this client.
AADL-owned	> 5 years	Child	Yes	Yes	Submit an authorization	Must have a condition change or wheelchair is not cost-effective to repair
			No	Yes		

## Procedure

### Authorizers:

- Refer to Policy GN – 28 Quantity and Frequency Review Process in AADL Program Manual Section GN – General Policy and Procedures at: <https://open.alberta.ca/publications/aadl-program-manual-gn>
- Assess client and determine if wheelchair can be modified or if a replacement is required.
  - Refer to Table 3: When to Submit a Quantity and Frequency Review for Manual Wheelchair Benefits.
- Advise clients of quantity and frequency limits and associated costs of replacing a wheelchair.
- Complete the Quantity and Frequency Review Request form found at: <https://formsmgmt.gov.ab.ca/Public/AADL2205.xdp>
- Obtain client signature on form, indicating awareness and understanding of the application and process. Advise client of next steps.
- Ensure client signs the Client Consent form.
- Complete quantity and frequency review request authorization on the Alberta Blue Cross online health portal. Authorization will remain pending until a decision is made by the AADL Program Manager.
  - Quantity and frequency review request authorization will be product specific. Indicate all the correct products required for the request. (e.g., W151, W107).

- If quantity and frequency review request is approved, authorization will be processed by Alberta Blue Cross and they will notify Authorizer that the authorization is ready to view.
- If this is an early replacement for a tilt chair from standard chair or growth for a pediatric walker or standing frame, use the one-time codes for early replacement in the online health portal drop down menus. If the client was previously approved for an early replacement due to growth, authorizers must submit a quantity and frequency review request.

**Clients:**

- Participate in reassessment.
- Understand and agree to any cost implications prior to signing the Quantity and Frequency Review Request form.
- Sign Client Consent form (if not already done).

**Vendors:**

- Receive requests to evaluate AADL wheelchairs for costs to repair or modify.
- Submit repair or parts change authorization requests on the Alberta Blue Cross online health portal if the repairs will be over the client's annual amount.
- Advise authorizers when repairs have been denied by AADL and that they can proceed with client reassessment. Advise authorizers of the age of the wheelchair in case a quantity and frequency review is required.

**Alberta Blue Cross:**

- Receives and log quantity and frequency review requests.
- Forwards quantity and frequency review requests to AADL for adjudication.
- Updates quantity and frequency review request status on the online health portal which can then be viewed on the provider portal.
- Sends notification of the decision to the authorizer, and the client if necessary.

**AADL:**

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

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## Policy WM – 07

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

#### Policy Statement

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

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

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

#### Returning wheelchairs

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

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

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

#### Repairs

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

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

Any parts changes or adjustments that need to be made within six months of the delivery of equipment to the client must be reviewed AADL. To initiate a review, vendors must submit a prior approval parts change or repair authorization through the online health portal. This can be done regardless of cost.

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

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

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

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

#### Procedure

##### Authorizers:

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

**Clients:**

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

**Vendors for new purchases and repairs:**

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

**Recycle Vendor:**

- Recycle-in – Arrange with clients to pick up wheelchairs when no longer required and recycle them in the AADL recycle inventory.
  - Pick up can be expected within five business days in Edmonton and Calgary, and 10 business days from any other location.
- Parts transfers – AADL or other vendors may ask to transfer recycle parts to another vendor that is repairing an AADL wheelchair.
- Track all recycled wheelchairs.

**Alberta Blue Cross:**

- Adjudicate and audit claims for repairs and recycle-ins submitted through the online health portal.
- Track history of repairs to the wheelchair via client history.

**AADL:**

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

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## Policy WM – 08

### Refusal of the Equipment

#### Policy Statement

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

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

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

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

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

#### Procedure

##### Authorizers:

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

##### Clients:

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

##### Alberta Blue Cross:

- Receives and log quantity and frequency review requests.
- Forwards quantity and frequency review requests to AADL for adjudication.
- Updates quantity and frequency review request status on the online health portal which can then be viewed on the provider portal.
- Sends notification of the decision to the authorizer, and the client if necessary.

##### AADL:

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



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## **Policy WM – 09**

### **Internal Transfers**

#### **Policy Statement**

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

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

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

Repairs/parts changes with the first six months after the wheelchair has been internally transferred do not require a quantity and frequency review. Repairs/parts changes over \$500 require prior approval.

Internal transfers are a two-step process. Authorizers must submit an authorization through the Alberta Blue Cross online health portal for a “Recycle-out – Internal transfer,” and then submit the generic specification form to the recycle vendor to complete the transfer. See AADL Program Manual Section ZR – Recyclable Benefits: Recycle Vendor Service for detailed instructions on completing internal transfers.

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## Policy WM – 10

### Patient Claim Statement

#### Policy Statement

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

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

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

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

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

#### Procedure

##### Vendors:

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

##### Alberta Blue Cross:

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

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# Policy WM – 11

## Definitions

### Approved product list

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

### Back-up wheelchair

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

### Controlled transfer

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

### Custom wheelchair

Custom wheelchairs are wheelchairs that have:

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

### Dependent full-time user

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

### Dependent part-time user

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

### Equipment trial

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

### Formal recycle

Formal recycle includes all manual and power wheelchairs that are owned and tracked by AADL. Manual and power wheelchairs are recycled-in when the client no longer needs the wheelchair and recycled-out when an AADL authorizer requests a wheelchair with the same or similar measurements/options. Once a wheelchair is no longer economical to repair or

refurbish, AADL removes it from formal recycle. These wheelchairs are used for parts and/or declared as surplus. Surplus equipment is handled through Surplus Sales, Service Alberta.

### **Full-time user**

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

### **Internal transfer**

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

### **Occasional user**

An occasional wheelchair user is a client that uses a wheelchair less than on a daily basis.

### **On the bench**

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

### **Palliative client**

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

### **Part-time user**

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

### **Recycle in/out**

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

### **Recycle inventory**

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

### **Recycle vendor**

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

### **Standard**

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

### **Standard plus wheelchairs**

Standard plus wheelchairs are any category of wheelchairs that have been approved as an upgrade when the client requests a higher category than they are eligible for. AADL uses discretion in granting standard plus benefit requests. AADL contributes a fixed amount towards the purchase of the standard plus wheelchair based on client eligibility. The standard plus wheelchair

is considered AADL-owned as AADL has paid more than 50 per cent of the wheelchair's cost. AADL owns and provides funding towards maintenance and repairs of standard plus wheelchairs. See Policy WM – 04 Authorization Process to determine process for calculating costs.

### **Substitute wheelchairs**

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

### **Upgrade costs**

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

### **Upgrade wheelchairs**

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

### **Valid authorization**

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

### **Wheelchair categories**

- Category A is a standard weight wheelchair designed for part- or full-time use. Includes tilt-in-space wheelchairs
- Category B manual wheelchair is a lightweight wheelchair designed for full-time use indoors and outdoors. The lightweight composition assists clients with upper extremity limitations to maintain independence in self-propelling.
- Category C manual wheelchair is an ultra-lightweight wheelchair designed for more active use indoors and outdoors. The ultra-lightweight and strong materials used in this wheelchair are meant to withstand frequent use for an active lifestyle. They tend to be rigid frames to keep the weight down and improve maneuverability.
- Grant for manual wheelchair – Upgrade or category D. A wheelchair that the client chooses to own and maintain for at least five years.
- Recycle manual wheelchair (category A) is a wheelchair provided through the recycle vendor.
- Category A high weight/heavy-duty manual wheelchair is a manual wheelchair designed to accommodate clients who weigh more than 250 pounds or within 10 per cent of the weight capacity of the chair. This includes wheelchairs with the heavy-duty package added.