Overview

• Background and overview of AADL seating benefits
• Eligibility criteria
• Assessment and authorization process
• AADL Seating Assessment form
• Review of the Seating Approved Product List (APL)
Background

- Seating was previously divided into two benefit areas
  - Wheelchair Accessories
  - Seating

- October 1, 2016, these areas were combined

- Benefits are categorized based on a “seating needs level”
  - Level A: Basic Seating
  - Level B: Specialized Seating
  - Level C: Complex Seating

Level A: Basic Seating

<table>
<thead>
<tr>
<th>Client Needs</th>
<th>Service Requirements</th>
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</thead>
<tbody>
<tr>
<td>• Individuals who utilize a wheelchair less than 6 hours/day</td>
<td>• Basic clinical skills and competencies in the field of wheelchairs, tissue viability and posture management</td>
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<tr>
<td>• Full-time wheelchair users who require postural support to improve comfort and positioning</td>
<td>• “One-off” seating recommendations and general advice</td>
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<tr>
<td>• Low risk for secondary complications</td>
<td>• Primary/Community provider</td>
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<tr>
<td>• Relatively simple needs</td>
<td>• No need for custom components</td>
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Level B: Specialized Seating

Client Needs | Service Requirements
---|---
• Full-time wheelchair user who requires postural support to safely and effectively use the wheelchair  
• Medium risk for secondary complications  
• Multi-dimensional needs  
• Low likelihood of need for custom components | • Specialized clinical skills and competencies in the field of wheelchairs, tissue viability and posture management  
• Assessment may link with other disciplines  
• Recommendations extend beyond equipment  
• Care pathway approach  
• Primary / community team

Level C: Complex Seating

Client Needs | Service Requirements
---|---
• Full-time wheelchair user who requires equipment to accommodate significant postural issues  
• Highest risk for secondary complications (skin breakdown, respiratory, etc.)  
• Clients with advanced neuromuscular conditions, life-threatening conditions, or who require adaptive technology mounted to the wheelchair  
• Multi-dimensional needs  
• Require ongoing monitoring and follow-up  
• High likelihood of need for custom components | • Expert clinical skills and competencies in the field of wheelchairs, tissue viability and posture management  
• Interdisciplinary team assessment, including Adaptive Seating Technicians  
• Recommendations based on comprehensive goals setting with various stakeholders  
• Case management approach  
• Regional / Tertiary Team
Authorization process Level A

- Authorizer: Vendor tech in collaboration
- 1250 and AADL Seating Assessment Form by mail

Authorization process Level B

- Authorizer: Second OT/PT in collaboration Commercial Seating Tech
- E-Business authorization: Client Declaration and seating assessment on file

Authorization process Level C

- Authorizer: Second OT/PT Adaptive Seating Tech
- E-Business authorization: Client Declaration and seating assessment on file
**Seating benefits by level**

<table>
<thead>
<tr>
<th>Level</th>
<th>Benefits</th>
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<tbody>
<tr>
<td>Occasional</td>
<td>V990 cushion only</td>
</tr>
</tbody>
</table>
| Level A | • Back cushions, backrests, headrests  
• Wheelchair accessories (tray, arm boards, seat inserts, transfer boards) |
| Level B | • Specialized cushions, backrests, headrest and wheelchair accessories  
• Other postural supports (straps, belts, lateral supports, etc.)  
• Wheelchair accessories |
| Level C | • Complex cushions, backrests, headrest and wheelchair accessories (aggressive positioning, custom-contouring, etc.)  
• Other postural supports (straps, belts, lateral supports, etc.)  
• Wheelchair accessories |

**Becoming a Seating Authorizer or Team**

<table>
<thead>
<tr>
<th>Level</th>
<th>Application Process</th>
</tr>
</thead>
</table>
| Level A | • Must be an OT or PT  
• Applications will be reviewed by AADL (secondary product range) |
| Level B | • Must be an OT or PT employed as part of an AADL-recognized Seating Team  
• Applications for Level B Authorizers and proposal for Level B Seating Teams will be reviewed by the AADL Seating Benefits Panel |
| Level C | • Must be an OT or PT employed as part of an AADL-recognized Seating Team  
• Applications for Level C Authorizers and proposal for Level C Seating Teams will be reviewed by the AADL Seating Benefits Panel |

**Authorizer requirements by level**

<table>
<thead>
<tr>
<th>Level</th>
<th>Requirements</th>
</tr>
</thead>
</table>
| Level A | • OT or PT  
• AADL Authorizer for wheelchairs  
• Experience with minimum 5 Level A assessments and fittings  
• Familiar with seating assessment protocols that include:  
  • Medical, social and functional history  
  • MAT assessment  
  • Client-centered goal setting  
  • Ongoing participation in annual continuing competency activities related to seating |
| Level B | • All of Level A  
• Be employed by an AADL recognized Level B Seating Team  
• Have a minimum experience of participating in 10 Level B seating assessments and fittings |
| Level C | • All of Levels A and B  
• Be employed by an AADL recognized Level C Seating Team  
• Have a minimum experience of participating in 20 Level C seating assessments and fittings |
Eligibility Criteria

• General AADL eligibility criteria
• General Seating eligibility criteria
• Clinical eligibility criteria by level

AADL General Eligibility Criteria

• Be a permanent resident of Alberta
• Reside at home or in a community setting
• Have a valid Alberta Personal Health Number
• Require benefits due to a long term disability or chronic illness
• Have a valid authorization completed by an AADL Authorizer
• Sign the "Client Declaration"
General Seating Eligibility Criteria

• The client’s postural supports needs are assessed and equipment is authorized by an AADL Seating Authorizer (Policy X-40).
  – Postural support is identified as an essential clinical need to enable safe and effective use of a wheelchair.

• The equipment is provided by an AADL approved Seating Vendor (Policy X-60).

• The assessment and provision of benefits is in compliance with AADL Seating Standards (Policy X-80)

Clinical Eligibility Criteria By Level

• Criteria for each level was developed in collaboration with clinical experts

• Designed to ensure a client receives an appropriate level of assessment based on their needs

• Criteria has been developed as a decision tree
Occasional Wheelchair Users

- Occasional wheelchair use is defined as less than daily use of a wheelchair (e.g., clients who do not require a wheelchair for daily mobility; who only requires a wheelchair for long distances or transportation).
- The client must have a permanent mobility base (e.g., wheelchair, power wheelchair, stroller, etc.). The mobility base can be privately owned or AADL-funded, but cannot be a temporary loaner or rental equipment.
  - Geriatric Chairs (“Geri chairs”) are not considered to be mobility bases.

Level A – Basic Seating

- Must have clinically assessed need for postural support
- Must have a permanent mobility base (e.g., wheelchair, power wheelchair, stroller, etc.)
- The mobility base can be privately owned or AADL-funded, but cannot be a temporary loaner or rental equipment.
  - Geriatric Chairs (“Geri chairs”) are not considered to be mobility bases.
- Must be at least a part-time wheelchair user, defined as daily use of less than 6 continuous hours.

Level B – Specialized Seating

- Clients must meet all Level A criteria, and:
  - Must be one of the following:
    - Pediatric client (0-17 years of age).
  - OR
    - Adult (18+ years) full-time wheelchair user, defined as daily use of at least 6 continuous hours, who also has one of the following:
      - Inability to sit independently, defined as Level of Sitting Scale 1-4
      - Have a significant, documented postural deformity, defined as a deformity in at least 1 anatomic plane of ≥ 20° or ≥ 2”(5cm).
Level C – Complex Needs

- Must meet Level B criteria, and:
- Must be one of the following:
  - Pediatric client (0-17 years of age) who has significant, documented postural deformities, defined as a deformity in at least 2 anatomic planes of $\geq 20^\circ$ or $\geq 2\text{"}(5cm).
  - OR
  - Adult (18+ years) full-time wheelchair user, who has documented, significant postural deformities, defined as a deformity in at least 2 anatomic planes of $\geq 20^\circ$ or $\geq 2\text{"}(5cm)$; combined with one of the following:
    - High risk of skin breakdown, defined as Braden score of $\leq 12$
    - Inability to sit independently, defined as a Level of Sitting Scale 1-4

**Seating Needs Level Screen Tool**

1. What type of wheelchair does the client use?
   - Permanent manual or power
   - Rental, temporary, Geri-chair
   - Client is not eligible for seating benefits

2. What is the age of the client?
   - 0-17 years
   - 18+ years
   - Go to Question 2
   - Go to Question 3

3. How often does the client use the wheelchair?
   - $\geq 6$ hours, daily
   - < 6 hours, daily
   - Less than daily use
   - Go to Question 4
   - Level A

4. What is the client's Braden score?
   - $\geq 13$
   - $\leq 12$
   - Go to Question 5
   - Go to Question 7

5. What is the client's Level of Sitting Scale?
   - 1-4
   - 5
   - 6-7
   - Go to Question 7
   - Go to Question 6
   - Level A

6. Does the client have a postural deformity in at least 1 anatomic plane of $\geq 20^\circ$ or $\geq 2\text{"}(5cm)$?
   - Yes
   - No
   - Level B

7. Does the client have a postural deformity in at least 2 anatomic planes of $\geq 20^\circ$ or $\geq 2\text{"}(5cm)$?
   - Yes
   - No
   - Level C

**Assessment and Authorization Process**
Eligibility & Referral

- Process begins when a need is identified
- The therapist involves completes the AADL Seating Screen Tool to assess eligibility and determine the client’s seating needs level
Eligibility & Referral

- The client should be referred to the most appropriate authorizer or team based on their needs
  - Contact the seating teams directly for referral process information
- A client may choose not to be assessed by the corresponding team, however may not be eligible for all the same benefits or the same level of funding
  - Client has the choice to upgrade
- Clients who are not eligible should be referred to alternate funding sources
Assessment

- Assessment must occur in an environment with appropriate space and equipment for the assessment of seating clients. This is typically a clinical setting but clients may be assessed in their own homes or care facilities if appropriate.

- Assessment must include a documented MAT assessment and client-centered goals. The goals must be “SMART” (Specific, Measurable, Attainable, Relevant, Time-related).

Assessment

- **Level A**
  - Complete AADL Seating Assessment form
  - Must be submitted along with 1250
  - Some exceptions are noted in the APL
    - Transfer boards, amp boards, occasional wheelchair user cushions

- **Level B & C**
  - May complete the AADL Seating Assessment form or another equivalent document. Must clearly capture all required eligibility criteria, MAT assessment and seating summary information.
  - Keep on client file. Authorizations completed via E-business
Assessment

- Once the client's equipment needs are known, the Authorizer must confirm previous consumption of seating benefits – IVR or E-business

Early Replacement

- If a client has previously received seating benefits, AND is still within the replacement frequency period, the client may be eligible for “early replacement”.
  - Refer to the APL for replacement frequency periods
Early Replacement

• The Authorizer must:
  – Confirm request is not for duplicate benefits.
  – Confirm if replacement is not possible under warranty.
  – Confirm alternate funding has been explored.

• If there is no alternate funding available, confirm if there is an Early Replacement Catalogue Number.

• If there is no Early Replacement Catalogue Number, follow the Quantity and Frequency Review (QFR) process.

Equipment Trial

• Once the specific equipment needs are known, the trial phase can begin.

• For QFR situations, the trial may or may not occur prior to the QFR being approved.
  – Authorizers must ensure the client is always fully informed of whether they are eligible for AADL benefits.

• The Seating Authorizer is responsible for all seating equipment recommendations. Technicians provide technical guidance and consultation only.
Equipment Trial

• Vendors are expected to provide trial equipment for no more than one week.
  – Equipment that is at risk for soiling or contamination during trial must be protected.
  – Trial equipment may or may not be the exact equipment that will be provided for the client.

• Seating Authorizers, Seating Vendors and the client should be in close communication during the trial period to ensure the final equipment selection will meet the client's assessed long-term needs.

Authorizations - Level A
For NON-QFR situations:

Authorizer completes 1250 authorization form and submits by mail
  – AADL Seating Assessment for must be attached
Authorizations - Level B & C
For NON-QFR situations

Authorizer completes authorization via E-Business
- Client must sign Client Declaration form, which is kept on client file
- Documentation of the assessment is kept on the client file

Authorizations - Level A
For QFR situations

Authorizer completes 1250 authorization form and submits by mail
- QFR reference number must be indicated on the 1250
- AADL Seating Assessment form must be attached
Authorizations - Level B & C
For QFR situations

Authorizer completes authorization via E-Business

- Client must sign Client Declaration form, which is kept on client file
- Documentation of the assessment is kept on the client file
- AADL will complete the override on E-business. If an authorization already exists, AADL will add the catalogue number to that authorization. If not, a new authorization will be created.

Fitting

- Once valid authorization in place, vendor can provide benefits. This is when the final fitting is completed.
- Seating Authorizers are responsible for final equipment selection and confirming appropriate fit of final equipment. It is recommended that the Seating Authorizer and the Seating Technician attend the final fitting appointment together.
Fitting

- The Seating Vendor, utilizing the appropriate technician, is responsible for ensuring correct installation and adjustment of all seating equipment.
- Seating Authorizers must ensure appropriate written instructions are provided to the client and caregivers on the care and maintenance of the seating system.
- The vendor is responsible for collecting any cost-share or upgrades and must provide a statement of account to the client.

AADL Seating Assessment Form

- Multiple pages that document the full seating assessment as well as the seating goals and equipment recommendations.
- There is a separate instruction sheet to explain how to properly complete the form.
AADL Seating Assessment Form

• All sections of the form must be completed, even if to indicate “within normal limits” or “no concerns”

• Sections A through F capture the functional, social and medical history of the client

• Sections G and H capture the physical assessment (MAT assessment and measurements)
  - Assessment must include object anatomic measurements when documenting a deformity. “Minor”, “slight”, “moderate”, “severe”, are not objective terms.

• Section I is the Seating Summary, which captures the client-centered goals and seating equipment recommendations

• Also documents who was present for the assessment

• The client section must be signed by the client or appropriate caregiver.
  - Unlike the Client Declaration, this does not have to be someone financially responsible for the client.

Client-Centered Goals

• The Seating Summary should always include client-centered goal. Why?
  - Goal of the process is client satisfaction.
  - Outcomes are key to a successful process.
  - Seating team understands outcomes.

• Word the outcomes clearly.

• Follow up with the client to check that the outcomes have been met.
Client-Centered Goals

• Writing Client-Centered Outcomes
• Focus on client needs.
• Ask the client some simple questions.
• Let the client develop the outcome.
• Use language that the client and/or caregiver understand.
• Negotiation on reasonable expectations may be required:
  • Share professional knowledge to allow client to make an informed decision.
  • Document information provided.

Client-Centered Goals

• Establishing Outcomes
• Who will do what under what circumstances?
  • Who the outcome is about.
  • What is the purpose of the outcome.
• Include a baseline condition (starting position).
• Avoid “planning” statements, for example:
  • The OT will assess cushions to enable foot propelling.
  • Jan needs a power chair and cushion
  • Instead:
  • John will sit in his chair to attend school without needing repositioning.
  • Ms. G. will be able to transfer the system between chairs.

Quiz

Is the following Outcome appropriately written?

• Mr. P. will not lean over.
Quiz

Is the following Outcome appropriately written?

• Mr. P. will not lean over.
  • No – it is not a full statement. Will he lean sideways, forwards and under what circumstances?

A correct outcome statement:

• Mr. P. will not fall to the sides in his wheelchair. Currently, he falls to either side within 10 minutes of sitting.

Quiz

Is the following Outcome appropriately written?

• Jim will not have a reddened area over the coccyx after sitting for two hours in his chair.

Quiz

Is the following Outcome appropriately written?

• Jim will not have a reddened area over the coccyx after sitting for two hours in his chair.
  • No – it is not a full statement.

A correct outcome statement:

• Jim will not have a reddened area over the coccyx after sitting for two hours in his chair. Currently coccyx is red after 15 minutes.
Quiz

Is the following Outcome appropriately written?

• Betty will sit up straight while sitting in her power wheelchair.

Quiz

Is the following Outcome appropriately written?

• Betty will sit up straight while sitting in her power wheelchair.
  • No – again, it is not a full statement.
  • Does “sit up straight” mean not leaning sideways, not slouching forward or both? Why does Betty need to sit up straighter – function, comfort, appearance?

A correct outcome statement:

• Betty will sit up straight while sitting in her power wheelchair. Currently, she falls forward when eating.

Quiz

Is the following Outcome appropriately written?

• Kim’s mother will be able to remove the insert from the wheelchair more easily. Currently, it takes 10 minutes to put the insert in the car trunk.
Quiz

Is the following Outcome appropriately written?

- Kim’s mother will be able to remove the insert from the wheelchair more easily. Currently, it takes 10 minutes to put the insert in the car trunk.
- Yes, the statement is complete.

Approved Product List

- Separated by product type – cushions, head supports, wheelchair accessories, etc.
- Information in the Approved Product List (APL):
  - Product description
  - Catalogue number
  - Quantity/frequency
  - Seating needs level
  - Maximum price
  - Special criteria
  - Other information or comments
Approved Product List

- A client is only eligible for benefits at their level
  - Level A client is eligible for Level A benefits
  - Level B client is eligible for Level A and B benefits
  - Level C client is eligible for Level A, B and C benefits

- Catalogue numbers are selected based on their generic description
  - The equipment provided MUST match the generic description

- All equipment must be provided from an AADL approved manufacturer
  - List in the APL

Approved Product List

- The price listed is a maximum
  - The vendor must invoice for the MSRP or retail price, whichever is lower.
  - The maximum is not automatically used

- Upgrades are permitted
  - Vendors must offer a choice of benefit that meets the generic description, and that is less than or equal to the maximum price
  - If a vendor cannot offer this, they must refer the client to another vendor
  - There is a variety of equipment at each level and price maximum to meet a client’s basic need. An upgrade is a client’s choice.

Summary
Summary

- AADL Seating Benefits can only be authorized by designated Seating Authorizers
- Assessment requirements are different for each seating needs level
- Level A Seating authorizations are completed on a 1250; Level B and C must be completed online using E-Business

Summary

- AADL only provides funding for the components listed in the Approved Product List (APL) for Seating and Wheelchair Accessories. Required equipment not listed should be referred to alternate funding sources
- The APL is a benchmark model, so all equipment must match the generic description for the corresponding seating needs level