



Small bathing and toileting benefits

Alberta Aids to Daily Living
Program Manual Section B



This publication is issued under the Open Government Licence – Alberta
(<http://open.alberta.ca/licence>).

Alberta Health
Alberta Aids to Daily Living
Telus House, 13th Floor
10020 100 Street NW
Edmonton, Alberta T5J 0N3

This publication is available online at <https://open.alberta.ca/publications/aadl-program-manual-b>

Alberta Aids to Daily Living Program Manual Section B – Small Bathing and Toileting Benefits | Alberta Health
© 2022 Government of Alberta | June 29, 2022 |

Contents

Policy B – 01	5
Small Bathing and Toileting Benefit Description.....	5
• Policy Statement	5
Policy B – 02	6
Eligibility Criteria.....	6
• Policy Statement	6
• Procedure	6
Policy B – 03	8
Authorizer Qualifications	8
• Policy Statement	8
• Procedure	8
Policy B – 04	9
Authorization Process	9
• Policy Statement	9
• Procedure	9
Figure 1	11
Authorization Process Flow Chart for Small Bathing and Toileting Benefits.....	11
Policy B – 05	12
Vendor and Trained Provider Criteria.....	12
• Policy Statement	12
Policy B – 06	13
Providing Small Bathing and Toileting Benefits.....	13
• Policy Statement	13
• Procedure	13
Policy B – 07	15
Quantity and Frequency Limits.....	15
• Policy Statement	15
• Procedure	15
Policy B – 08	17
Ownership and Responsibility – Repairs and Maintenance	17
• Policy Statement	17
• Procedure	17
Policy B – 09	18
Refusal of Equipment.....	18

- Policy Statement 18
- Procedure 18
- Policy B – 10 19**
- Patient Claim Statement..... 19
- Policy Statement 19
- Procedure 19
- Policy B – 11 20**
- Definitions 20

Policy B – 01

Small Bathing and Toileting Benefit Description

Policy Statement

Alberta Aids to Daily Living (AADL) provides funding for small bathing and toileting equipment for AADL clients with chronic, long-term difficulties in ambulating and mobility to enhance their independence in the self-care activities of bathing and toileting, increase safety during these activities and prevent the need for a higher level of care.

Best practice supports the use of bathing and toileting aids to increase safety outcomes.

Small bathing and toileting benefits include raised toilet seats, toilet armrests, toilet safety frames, stationary commodes, bath seats, bath benches, transfer boards, and grab bars. See Alberta Aids to Daily Living Approved Product List B – Small Bathing and Toileting Equipment for details.

AADL uses a benchmark model to fund large bathing and toileting benefits found on the approved product list. See Policy B – 11 Definitions for the definition of a benchmark model.

Products and pricing on the approved product list are reviewed annually and are subject to change by AADL at any time during the year.

Small bathing and toileting benefit authorizations are processed through the Alberta Blue Cross online health portal.

AADL-approved manufacturers are listed on the approved product list for specific benefits. Manufacturers may apply to become an AADL-approved manufacturer at any time.

Small bathing and toileting benefits are considered owned by the AADL client once the funding is released to the client's vendor.

A client may enter into a rental agreement with a small equipment vendor for temporary or short-term use of this type of equipment. AADL does not reimburse clients for rental charges associated with temporary, short-term use of small bathing and toileting equipment.

Policy B – 02

Eligibility Criteria

Policy Statement

The eligibility criteria policy assists clients, guardians, authorizers and vendors in identifying eligibility to access small bathing and toileting benefits.

Clients must meet general eligibility requirements found in 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 small bathing and toileting benefits must be determined by an AADL authorizer prior to authorization.

Pediatric and adult clients may access small bathing and toileting benefits.

AADL provides funding for bathing and toileting aids for clients who meet all the following criteria:

- the client has a chronic, long-term mobility impairment
- the client's weight falls within the weight limits of the equipment
- the client has no other benefit for bathing and/or toileting function with the exception of incontinence supplies, and
- the client's residence is in a self-contained home/apartment or Supportive Living Level 2 in a congregate living site

Eligibility for the complex bath seat benefit on the approved product list includes all the following:

- the client has severe contracture(s) with bony structural deformities
- the client is unable to maintain safe sitting posture even for brief period,
- the client is unable to shower using a tilt commode with head support, and padded pelvic and chest support

AADL does not provide funding for bathing and toileting equipment for:

- short-term or fluctuating needs such as post-acute care when acute rehabilitation is not completed
- use in acute care or sub-acute facilities; the equipment may be ordered as part of a definitive discharge plan when the client is returning to the community
- options chosen for personal preference or not clinically indicated
- clients in congregate living sites under supportive living (Level 3 and 4) or long-term care

AADL provides a limited number of bathing and toileting benefits per eligible client based on current best practice and expected use. See Alberta Aids to Daily Living Approved Product List B – Small Bathing and Toileting Equipment for specific limits.

Procedure

Authorizers:

- Confirm client meets AADL general eligibility for benefits.
- Confirm clients' previous benefit consumption:
 - refer to Alberta Aids to Daily Living Approved Product List B – Small Bathing and Toileting Equipment for quantity limits
 - refer to the Patient Inquiry screen on the Alberta Blue Cross online health portal and check product consumption
 - refer to Policy B – 07 Quantity and Frequency Limits for clients who are over quantity/frequency limit
- Inform clients of their eligibility status.

Clients:

- Confirm eligibility with authorizer.
- Sign Client Consent form.

Vendors:

- Check clients' previous benefit consumption:
- Refer to Alberta Aids to Daily Living Approved Product List B – Small Bathing and Toileting Equipment to determine quantity limits for each bathing or toileting benefit.
- Refer to the Patient Inquiry screen on the Alberta Blue Cross online health portal, review the client's benefit consumption history and confirm they are eligible for the benefit.
- Refer to Policy B – 07 Quantity and Frequency Limits for clients who are over quantity/frequency limit.

Alberta Blue Cross:

- Responds to telephone or email requests for information on bathing and toileting benefits eligibility; provides reference to the AADL website for further information.
- Adjudicates authorizations submitted through the online health portal.

Policy B – 03

Authorizer Qualifications

Policy Statement

The authorizer qualifications policy facilitates accountability and transparency.

AADL accepts applications from occupational therapists, physiotherapists and registered nurses who meet the general eligibility set out in Policy GN – 03 Application to be an Authorizer in AADL Program Manual Section GN – General Policies and Procedures at: <https://open.alberta.ca/publications/aadl-program-manual-gn>

Small bathing and toileting benefits are considered a primary product range for occupational therapists, physiotherapists and registered nurses as set out in Policy GN – 03. See Policy GN – 03 for further explanation on primary and secondary product ranges.

Authorizers and assessors must be competent in assessments and related interventions for bathing and toileting functions. Knowledge on the purpose of the various options and features on bathing and toileting equipment is necessary.

Procedure

Authorizer Applicants:

- Confirm eligibility.
- Complete the Authorizer Application form at: <https://formsmgmt.gov.ab.ca/Public/AADL2218.xdp>
- Complete the requisite authorizer training.
- Once approved by AADL, authorize in accordance with policies and procedures.

AADL:

- Provides authorizer on-line pre-requisite training module.
- Provides training for primary product ranges.
- Monitors authorizer activities and determines compliance with policies and procedures.

Policy B – 04

Authorization Process

Policy Statement

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

Small bathing and toileting benefit authorizations includes the assessment, equipment trial and the submission of a valid authorization on the Alberta Blue Cross online health portal.

Authorizers must adhere to the general policies and procedures for authorizing AADL benefits and follow the AADL procedure for authorizing small bathing and toileting benefits.

Whenever possible, authorizers should access loaner programs for bathing and toileting equipment for palliative clients to reduce client costs associated with cost-share.

Assessment:

Assessments for small bathing and toileting benefits funded by AADL must be completed and documented by an occupational therapist, physiotherapist or registered nurse trained in interventions related to basic bathing and toileting activities.

Assessments must be in the client's home environment. As an alternative, a simulated home environment may be used if able to accurately replicate the client's home. The mode of transporting the equipment should be considered. Equipment purchased by AADL that is found to be inappropriate for the client's home is not replaced by AADL.

The assessment date is the date the full assessment, including equipment trial is completed, rather than when the assessment started.

Equipment Trial:

Equipment must be from an AADL-approved manufacturer, indicated in Alberta Aids to Daily Living Approved Product List B – Small Bathing and Toileting Equipment that meets the generic description.

Small bathing and toileting benefit vendors will provide equipment for trial purposes with the client and healthcare assessor on site. The authorizer may permit the vendor to determine the final choice between two similar products in the client's home in situations where a healthcare assessor has provided a choice of two products that meet the client's clinical needs. The authorizer must follow up with the client to ensure client satisfaction.

For infection control, raised toilet seats are trialed with the use of gloves and plastic barriers; bath benches and commodes are dry run trials only.

Authorization Submission:

Authorizations are entered on the Alberta Blue Cross online health portal after the client's product consumption history has been reviewed to confirm eligibility for the benefit.

All authorizations for small bathing and toileting benefits expire when the benefit has been provided to the client and the associated vendor claims have been processed or within a year of the assessment date.

Procedure

Authorizers:

- Confirm client eligibility for benefit including residence and past consumption. Refer to Policy B – 02 Eligibility Criteria.
- Confirm the client has no other benefit that conflicts with intended benefit or serves dual function.
- If benefit requested is over frequency limit, complete quantity and frequency review request authorization on the online health portal and upload relevant documents. Refer to Policy B – 06 Quantity and Frequency Limits.

- Assess client or review assessment if assessor is not the authorizer. Client assessment must be completed in the home or a simulated home environment.
- Provide client with choice of vendors per list of AADL-approved vendors. Policies for trialing equipment from vendors should be explained to the client.
- Arrange for trial equipment with the vendor.
- Trial equipment to ensure it is appropriate for client in their environment or in a simulated environment. Consider ability to move equipment in/out of bathtub or through doorways as appropriate. Review care and maintenance with client and/or caregiver.
- Document assessment details and clinical rationale to support the provision of the small bathing or toileting benefit(s). This must be kept in the client's file and submitted to AADL upon request. Ensure the client understands any costs that may incur. See "Benchmark Price" and "Upgrade Costs" under B – 11 Definitions.
- Determine where equipment is to be delivered and arrange for follow-up as appropriate.
- Complete the authorization on the online health portal and submit. Include criteria-related information to assist AADL in establishing client's eligibility as indicated on the approved product list. Include benefit catalogue number.
- Have client sign the Client Consent form.

Clients:

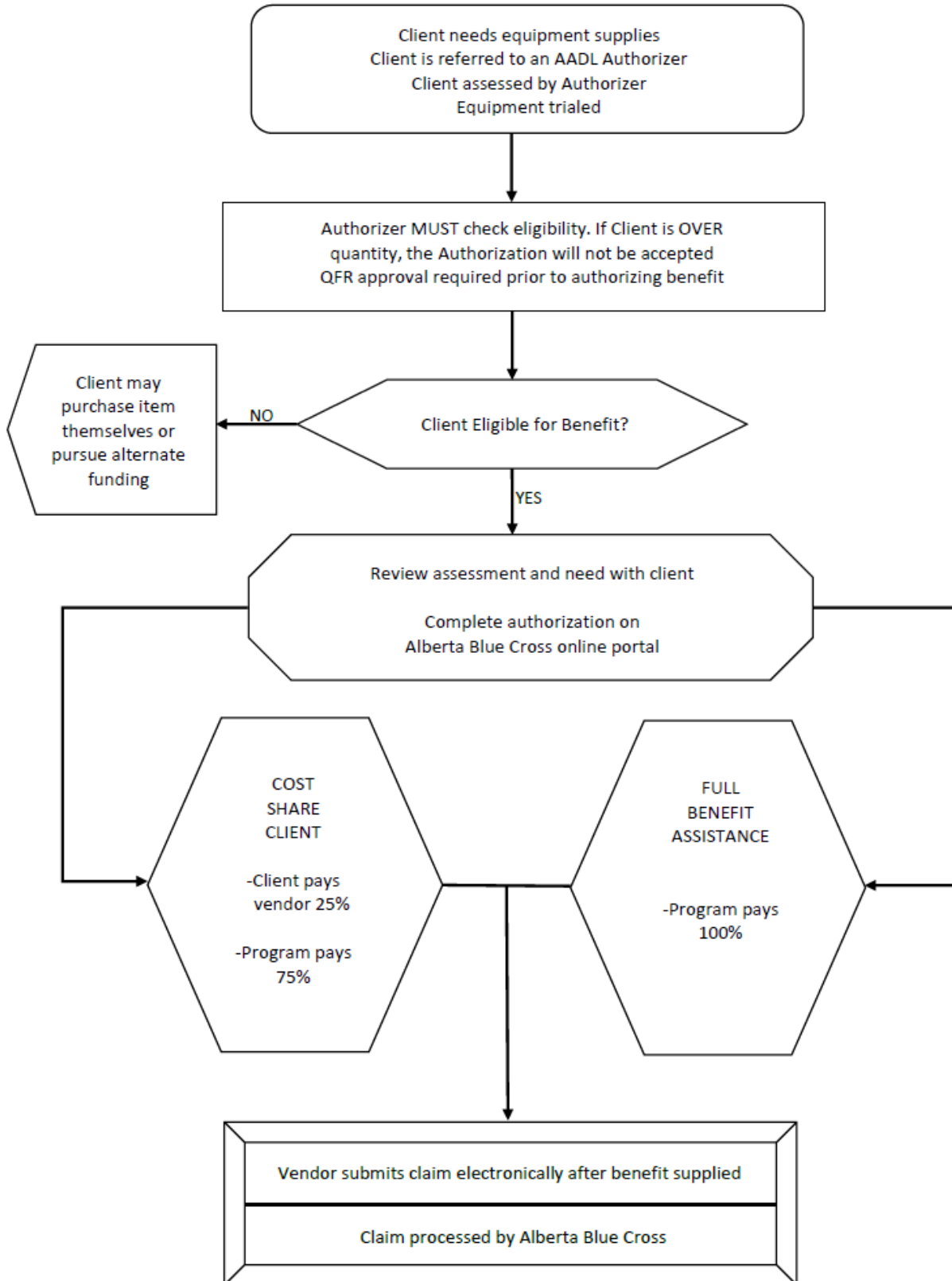
- Fully participate in assessment.
- Comply with trialing protocol - dry run only, do not sit on bathing/toileting aid with exposed skin.
- Return equipment to AADL approved vendor after trial is over.
- Sign Client Consent form signifying agreement and understanding.

Vendors:

- Provide trial equipment as requested by the authorizer.
- Follow infection control practices during trial.
- Check for authorization on the online health portal and confirm eligibility by referring to client's consumption history.
- Proceed to providing benefit. See Policy B – 06 Providing Small Bathing and Toileting Benefits.

Figure 1

Authorization Process Flow Chart for Small Bathing and Toileting Benefits



Policy B – 05

Vendor and Trained Provider Criteria

Policy Statement

AADL-approved small bathing and toileting benefit vendors must meet the following criteria:

- Meet AADL's general vendor criteria as outlined AADL Program Manual Section GN – General Policies and Procedures.
- Adhere to benchmark pricing as outlined in AADL Program Manual Section GN – General Policies and Procedures.
- Provide warranty service for any product provided through AADL funding.

Product/Equipment:

- Stock on site a choice of two different manufacturers' products, at minimum, for the each of the following groupings:
 - bath seats
 - transfer tub seats
 - wall/tub grab bars
 - raised toilet seats
 - stationary commodes
- At least one product from each grouping must be on display and fully assembled.
- Vendors must carry common replacement parts, including suction/rubber tips, for the products they carry.
- AADL vendors must ensure bathing and toileting benefits provided through AADL funding meet all quality standards set out in the approved product list.

Trained Provider Qualifications:

- Ensure staff are educated on AADL policies and procedures as stated in the most current AADL Program Manual Section GN – General Policies and Procedures, Program Manual Section B – Small Bathing and Toileting Benefits and approved product list.
- Ensure staff have the necessary expertise related to the provision of AADL benefits and associated invoicing and business processes.

Policy B – 06

Providing Small Bathing and Toileting Benefits

Policy Statement

The providing small bathing and toileting benefits policy promotes effective and efficient provision of benefits.

Providing small bathing and toileting benefits includes an equipment trial with the client, providing the equipment, fitting the equipment to the client, documenting, client billing and claims.

AADL vendors must have an agreement with AADL and Alberta Blue Cross to provide small bathing and toileting benefits.

AADL vendors must ensure bathing and toileting equipment provided through AADL funding meet all quality standards set out in Alberta Aids to Daily Living Approved Product List B – Small Bathing and Toileting Equipment.

AADL uses a benchmark pricing model for small bathing and toileting benefits. AADL vendors must offer AADL clients equipment for a price equal to or below benchmark prices listed on the approved product list.

Clients must be advised that they should purchase insurance to cover the cost of replacements should the equipment be lost, stolen or damaged. AADL does not replace lost, stolen or damaged equipment.

Clients are responsible for repairs and maintenance of all small bathing and toileting benefits. See Wear and Care under Policy B – 08 Ownership and Responsibilities.

Vendors must be able to provide common replacement parts for AADL funded equipment they carry.

Procedure

Authorizers:

- Arrange followup to ensure the bathing or toileting aid is of benefit to the client.
- Complete documentation, including:
 - client able to perform toileting/bathing function with aid
 - client provided with and understands instructions on wear and care of bathing or toileting aid
 - client informed of recommendation to purchase insurance to cover equipment in case of loss, damage or theft
 - client satisfaction with fit

Clients:

- Clients (or their guardian/trustee) pay the cost-share portion (unless exempt) directly to the vendor for selected equipment.
- Receive bathing or toileting aid and confirm satisfaction that the equipment fits and meets specifications.
- Understand responsibility for the care and maintenance of the equipment as equipment is not replaced due to damage outside of normal use.

Vendors:

- Confirm eligibility for the benefit on the Alberta Blue Cross online health portal prior to providing the benefit to the client.
- Provide bathing or toileting aid and confirm equipment meets specifications as authorized.
- Provide written instructions on bathing or toileting aid's care.
- Document client satisfaction. If client is using a designate, document designation of person accepting responsibility for client satisfaction of the equipment.
- Enter on the claim on the online health portal claim on the day it is provided to the client (service date).

Alberta Blue Cross:

- Conducts audits on authorizers' and vendors' compliance with policy and procedures for quality assurance and accountability purposes.
- Audits charges on claims for equipment submitted by vendors and pays vendor claims.

Policy B – 07

Quantity and Frequency Limits

Policy Statement

The quantity and frequency limits policy for small bathing and toileting benefits ensures transparency, consistency and accountability.

AADL sets annual limits on the number of small bathing and toileting benefits equipment funded per eligible client based on current best practice and expected wear. See Alberta Aids to Daily Living Approved Product List B – Small Bathing and Toileting Equipment for the specific limits at: <https://open.alberta.ca/publications/aadl-program-manual-b>

AADL will fund one benefit per function; duplicate benefits are the responsibility of the client. For example, if a client has a raised toilet seat, they are not eligible for a commode.

Small bathing and toileting equipment will only be replaced when:

- the equipment has been maintained and has been used as designed (normal wear), and
- the current equipment was ordered for long-term needs, and
- the client's condition has changed and the current equipment no longer meets the clinically-assessed basic need

In exceptional circumstances, AADL will review requests for benefits over the quantity and frequency limits set out in the approved product list. A quantity and frequency review request authorization is submitted on the Alberta Blue Cross online health portal. The following documents must be uploaded:

- Quantity and Frequency Review Request form
- Client Consent form
- Other supporting documentation detailing why the client requires additional benefits

AADL does not replace equipment for any of the following reasons:

- equipment was lost, stolen, misused or damaged
- to accommodate renovation changes or voluntary moves
- client preference

Procedure

Authorizers:

- Explain quantity and frequency review policy and process to client, ensuring client and/or caregiver understands.
- Pursue alternate funding, such as private insurance, prior to requesting additional funds from AADL.

Clients:

- Maintain care of the small bathing and/or toileting equipment to prolong life of benefit provided through AADL and to prevent need for premature replacement of benefit.
- Pursue alternate funding sources prior to requesting additional funds from AADL.
- Consult with AADL authorizer when replacement of AADL equipment is required.
- Ensure replacement equipment authorized meets their basic need during trial and when delivered.
- Seek alternate funding for equipment needs that fall outside the quantity and frequency limits.

Vendors:

- Identify clients who require a quantity and frequency review request to replace a bathing or toileting aid funded by AADL. Refers these clients to an AADL authorizer for reassessment.

- Educate client on care of equipment and availability of maintenance parts to prolong life of benefit and prevent need for early replacement.
- Prevent need for quantity and frequency review requests by replacing or repairing equipment when under warranty or when it is cost-effective. See “Cost-Effective Repairs” in Policy B – 11 Definitions.
- Provide AADL-funded replacement equipment to client when valid authorization has been confirmed.

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 client where appropriate.

Policy B – 08

Ownership and Responsibility – Repairs and Maintenance

Policy Statement

AADL provides clear and consistent guidelines and procedures for responsibilities related to maintaining and repairing AADL-funded small bathing and toileting equipment to ensure transparency, consistency and accountability.

Small bathing and toileting equipment funded by AADL is owned by the client.

Clients (family/guardian/trustee) are responsible for keeping their AADL-funded equipment in good, safe working order through regular maintenance and repairs according to manufacturer recommendations.

Clients are responsible for the costs of maintenance and repairs outside warranty. Warranty periods are listed in Alberta Aids to Daily Living Approved Product List B – Small Bathing and Toileting Equipment at: <https://open.alberta.ca/publications/aadl-program-manual-b>

AADL small bathing and toileting benefits vendors provide warranty and repair on AADL-funded equipment.

Government-funded equipment may not be resold by a client, authorizer, or vendor. Once the client no longer requires the equipment, it may be donated to a community organization or individual in need.

Procedure

Authorizers:

- Ensure client understands responsibility for care and maintenance of AADL-funded equipment.
- Advise clients to keep a record of the initial invoice from the vendor as well as any maintenance and repairs to equipment.

Clients:

- Request information and/or equipment manual from vendor to become familiar with warranty, maintenance and repair recommendations from manufacturer.
- Ensure reasonable care and maintenance of AADL-funded small bathing and toileting equipment.
- Accept responsibility to obtain insurance in case of damage or loss of equipment.

Vendors:

- Review or provide written instructions for care and maintenance of AADL-funded small bathing and toileting equipment with clients. Provide manufacturer manual as available.
- Educate client on care of equipment and availability of maintenance parts to prolong life of benefit.
- Replace or repair equipment under warranty without cost to AADL.
- Assist client in determining when equipment is no longer economical to repair based on AADL standard formula – repair should cost less than 50 per cent of the cost to purchase the equipment new.
- If not cost-effective to repair, advise client to get reassessed by an AADL authorizer for a replacement piece of equipment.

Policy B – 09

Refusal of Equipment

Policy Statement

The refusal of equipment policy ensures transparency and accountability.

Clients who refuse equipment are not eligible for AADL funding for another bathing and toileting benefit for a minimum of six months. By signing the Client Consent form, the client acknowledges they are prepared to accept the equipment that was authorized and ordered for them. During the authorization process, the client agrees to trial the equipment and ensures their home and living situation accommodates 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 form must be cancelled by the authorizer.

Clients who request funding for the benefit after refusing the same type of benefit must submit a letter explaining the circumstances of their refusal and assurance that they will accept the second authorized benefit. 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.
- Complete a quantity and frequency review request authorization on the Alberta Blue Cross online health portal for the item and upload the letter from the client (family/guardian/trustee) as supporting documentation.
- 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 Quantity and Frequency Review Request form, attach client letter and submit via the online health portal. The request will be directed to AADL for review.

Clients:

- Pursue alternate funding resources for equipment previously refused, prior to requesting funding from AADL.
- Participate in reassessment with authorizer.
- Write letter describing circumstances and providing assurances as described above.
- Agree to accept costs associated with receiving the equipment.

AADL:

- Receives the quantity and frequency review request and supporting documentation and reviews the circumstances around the refusal of the equipment
- Adjudicates and provides decision to Alberta Blue Cross.

Alberta Blue Cross:

- Updates online health portal with decision and sends notification to authorizer, and client where appropriate.

Policy B – 10

Patient Claim Statement

Policy Statement

Small bathing and toileting benefit 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

Small Bathing and Toileting Vendors:

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

Alberta Blue Cross:

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

Policy B – 11

Definitions

Approved Product List

The approved product list is a document on the AADL website outlining the products AADL provides funding for. Only products listed on the approved product list are available through AADL.

Benchmark Pricing

AADL provides a generic description of a benchmark benefit and sets the benchmark price as the maximum price AADL will fund for any product that fits the generic description. The benchmark prices for small bathing and toileting benefits are listed under the column Price Maximum in the approved product list. Vendors must provide at least one item at or below benchmark price.

Community Recycle

AADL-funded equipment identified as community recycle may be recycled within the client's community, usually the home setting the client is in. The client may donate the equipment to another client, local community recycle pool or facility once it is no longer needed. It may never be resold.

Cost-Effective Repairs

Repairs are considered cost-effective when the cost of the repair does not exceed 50 per cent of the cost to replace the entire bathing or toileting device.

Equipment Trial

An equipment trial is a trial that involves the assessor, client and caregiver when appropriate. The equipment is trialed to ensure the one chosen is appropriate. A trial must include accessing environments where the equipment will be used such as the bathroom and bedroom. Simulated environments are accepted. Trial equipment is provided by AADL small bathing and toileting benefits vendors.

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.

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 part of the upgrade cost; upgrades are over and above cost-share.

Valid Authorization

An authorization is considered valid when information submitted to Alberta Blue Cross is complete, the Client Consent form is signed and submitted, all necessary clinical rationale is documented, the client meets the relevant eligibility criteria and any requisite prior approval has been provided.