Driving Evaluation Programs: Development and Effective Service Delivery

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Susan Pierce, OTR/L, SCDCM, CDRS
Adaptive Mobility Services, Inc.
Orlando, FL
spierce@adaptivemobility.com
Welcome by Elin Schold Davis

- This program is offered in appreciation of the:
  - Many applicants for the NHTSA funded mini-grants
  - In recognition of the wide range of excellent proposals and ideas
  - In hopes of encouraging continued progress toward the goal of driving and community mobility program development, regretting that we could not offer more grants!
- We welcome learning about your progress and hope to offer TA as possible
Thank You!

- Thank you to The National Highway Traffic Safety Administration (NHTSA) for funding the mini-grants cooperative agreement with AOTA
- Thank you to Susan Pierce for her tireless support of driving rehabilitation program development and TA for this project
- Thank you to each participant for your effort to expand resources and services critical to the safe mobility for seniors!
- Fore more information
  - [www.aota.org/olderdriver](http://www.aota.org/olderdriver)
  - [driverhelp@aota.org](mailto:driverhelp@aota.org)
  - Elin Schold Davis [escho1ddavis@aota.org](mailto:escho1ddavis@aota.org)
Webinar Rules

• Elin will serve as your moderator
  • Elin will put all participants on MUTE during the presentation
  • Please send questions in writing via the LIVEMEETING program
• We will offer a short Q&A at the end, addressing the written questions received. However, we may follow-up the session with written responses if the questions exceed our time allotted.
Intro by Susan Pierce

- My task is to answer some of the questions submitted before today.
- Typical questions – good questions
- The mission – expand program and start new programs
- Pleased to see the work being done and supported by AOTA & NHTSA
Let’s get started!
The questions centered around:

- The OT Practitioner’s Role
- Common clinical assessment tools used when determining to refer or not refer to a specialist
- Reimbursement and billing issues
- Hospital-based vs. private practice
- Business aspects of starting a driving program
- Insurance
- Liability Issues of a driving program
Today’s News

• The Good News is that there are answers to all of these questions today some\textit{where}!

• The Better News is that I believe that as a trained occupational therapy professional you probably already know the answers to most of those questions yourself!

• First, a few overview comments:
Question

- The OT Practitioner’s Role
AOTA has greatly helped in defining the OT Practitioner’s Role

- OT Generalist

- OT Specialist in Driving

- *Driving and Community Mobility for Older Adults: Occupational Therapy Roles*, AOTA Online CEU Course, 2005, [www.aota-learning.org](http://www.aota-learning.org). ($112.50 members)

- *Occupational Therapy Practice Guideline for Driving and Community Mobility for Older Adults* (AOTA Press, 2006)
The Association for Driving Rehabilitation Specialists
www.ADED.com

- Best practice guidelines
- Model program guideline
- Certification
- Annual conference and Chapter Meetings
- Membership directory
- Factsheets
Education Efforts & Resources

- We have seen a leap in involvement by OT
- The reality: there are still not enough therapists stepping up to the plate and doing their due diligence
- Unmet need...
  - Physicians are not “referring” when no program is offered
  - Consumer and physician demand is too often met with the negative “we don’t offer driving”
  - Awareness: “What is driving rehabilitation???”
Occupational Therapy...

“...focuses on assisting people to engage in daily life activities that they find meaningful and purposeful.”

(OTPF, 2002, pg 610)
Instrumental Activities of Daily Living:

- Care of others
- Care of pets
- Child rearing
- Financial management
- Community mobility
- Health management and maintenance
- Home establishment and management
- Meal preparation & cleaning
- Safety procedures and emergency responses
- Shopping
Driving is a vital activity that contributes to health and well-being.

Vital: “essential to life, of greatest importance, & indispensable.”

(Webster’s dictionary)
The Conclusion:

• Driving is in the Domain of Occupational Therapy

• Occupational Therapy programs need to develop their response to the IADL question “Can I (or my parent or my patient, etc) drive?”
A question for you: How do you address IADL competence in your practice?

- How do you address the ADL of dressing, grooming and cooking within your practice?

(Elin will briefly un-mute the line – Susan is looking for your responses to her questions...)
The OT Process for any ADL

- Evaluation toward developing your individualized intervention plan involves:
  - Occupational profile
  - Evaluation of performance skills
  - Contextual and environmental factors
  - Client factors
Can we not perform the same process for the IADL of driving & community mobility?
The OT Practitioner’s role in regards to Driving & Community Mobility:

- Develop an occupational profile
- Evaluate performance skills as they relate the activity demands of driving and community mobility
- Consider client factors that may impair driving abilities
- Consider contextual & environmental factors that may impede safe driving and use of transportation choices
- Come to a conclusion: Develop and complete an OT intervention plan
The Intervention Plan for Driving

- OT’s decision tree
  - Are they functioning “within normal limits” with no red flags or barriers regarding driving sub-skills (vision, physical functioning, cognition)?
    - I do not have reason to flag this client for further evaluation related to driving (the client will likely return to normal driving) – document, inform, educate
  - Should I delay the conclusion because there are performance skill issues or contextual/environment factors that I can enhance, improve or change that may positively affect their driving skills?
    - Not yet
  - If there is a red flag but not an obvious answer re: their driving ability, then the referral to the OT Specialist in Driving should be made.
    - Referral based on evidence
    - A referral that is defendable and justified
What has happened in the past:

- The OT Generalist asked if the client wanted to drive
- If yes, referral made to Specialist without professional judgment
  if this was good or bad timing
  - Was readiness to pass considered?
  - Was the therapist familiar with the driving program and what they expected from the client?
  - Was cost and time explored with client and/or family?
- **Simply referring is not enough!**
  - The OT Generalist has a role in determining readiness to consider driving as much as they think & consider readiness to advance expectations for dressing, grooming, cooking and all other ADL / IADLs.
I believe that:

- if we use our holistic eyes....
- if we consider driving as any other ADL....
- if we use our good professional judgment...
- if we follow our code of ethics and practice standards...

Then we will know the answer of the OT Practitioner’s Role
The questions centered around:

- The OT Practitioner’s Role
- **Common clinical assessment tools used when determining to refer or not refer to a specialist**
- Reimbursement and billing issues
- Hospital-based vs. private practice
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Driving Performance: A hierarchy of skills

**STRATEGIC LEVEL**
Anticipates & makes decisions (route and conditions) before actual driving

**TACTICAL LEVEL**
Driver makes judgments about self (self-awareness) and other road users. Adjusts speed, distance, etc. requiring complex cognitive control.

**OPERATIONAL LEVEL**
Requires basic driving skills. Steering, braking speed, lane position, gap judgment.

Based on Mlchon Levels
Common clinical assessment tools used when determining to refer or not refer to a specialist

- Evaluation tools used in your practice that indicate a impaired sub skill likely to impact driving competence
  - Vision
  - Physical ability
  - Cognition

- Evaluation tools used to indicate referral to a specialist
  - Develop a relationship with your local driving rehabilitation programs
  - Develop your referral pathways that justify the time and cost for the specialist evaluation
Professional Judgment

- We **must** value our OT skills and our judgment
- This is what separates us from the DMV examiners and the driving schools.
- Our holistic perspective....our consideration of the occupation of driving and not just the physical act of vehicle operation!
- It is not just about driving a car? What about the tactical and strategic levels?
• Considering our *professional code of ethics and standards of practice*, OT practitioners “are expected to comply with the principles, values, and conduct delineated in the Code and related ethics documents.”

• This applies to addressing driving and community mobility as an IADL as it does to any other activity or responsibility that is within the domain of occupational therapy.

• Addressing driving and community mobility is also addressing the client’s as well as the publics safety
The OT Generalist should:

- Develop P & P in your facility for addressing driving
- Know the resources for OT Specialist(s) in your region
  - Contact them
  - Develop a referral pathway & communication
- Know the Dept of Driver Licensing requirements for vision, seizures, renewals, reporting of medical conditions, etc.
  - [http://www.aamva.org/KnowledgeCenter/ResearchCtr/Resources](http://www.aamva.org/KnowledgeCenter/ResearchCtr/Resources)
Then....

Just do it!!!
The questions centered around:

- The OT Practitioner’s Role
- Common clinical assessment tools used when determining to refer or not refer to a specialist
- **Reimbursement and billing issues**
- Hospital-based vs. private practice
- Business aspects of starting a driving program
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Facts about reimbursement/billing

- Reimbursement by Medicare & private health insurance is tough.
- Some facilities will bill 3rd party payers for the clinical evaluation using codes for functional mobility, community re-entry, ADL evaluation or extended ADL evaluation.
- They will not bill for the on-road piece – so private pay.
- Many facilities will offer a discount on services for a senior.
- Medicare would not pay for any of it if they knew it was for driving so must be careful with documentation.
The questions centered around:

- The OT Practitioner’s Role
- Common clinical assessment tools used when determining to refer or not refer to a specialist
- Reimbursement and billing issues
- **Hospital-based vs. private practice**
- **Business aspects of starting a driving program**
- Insurance
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Hospital-based vs. private practice
Business aspects of starting a driving program

- Developing a program is do-able and viable in both settings ... but you need your ducks in a row
- Programs serving the “older driver” are growing
- Viable programs tend to offer a range of services
  - Hospital based
  - Private practice
- Not every program needs a van. (research)
“this service is not defined by having a car”

You need:
- Knowledge
- Use your OT skills
- The Confidence to make a decision
  - yes...grey...refer...no
- The judgment of knowing when it is necessary to refer to the driving rehabilitation specialist.
Working in non-profit setting?

• Could resources from your driving program fulfill requirements for community outreach or service, required to maintain your non-profit status?
  • Community education, screening, etc.
  • Toolkit resources for offering education!
Facts about private billing:

- Driving is a valued ADL. For many, finding a service to address this question is well worth the cost.
- If it is not perceived as a **valued service**, then the client will not be motivated to pay for it.
- OT Generalists **must must must** be better at describing the driver evaluation process and its value! They should not use negative terms such as costly or **may be necessary** instead of **it is necessary**.
- **95% of my call-in clients/families will come for the driver evaluation after I have explained who I am and what I do.**
Liability for a program can be managed

- Using Best practice procedures
- Having good communication
- Having good documentation procedures
- Informing and Educating all Parties
- Having professional liability insurance
- Using a competent Specialist
- Knowing the outcome
Occupational Therapy Students

- Education Module
  - *Older Drivers in the Community: An Education Module for Entry-Level Occupational Therapy Practitioners*
  - Available to all OT programs, format flexible for classroom or individual study
  - Contact escholddavis@aota.org
- CarFit [www.car-fit.org](http://www.car-fit.org)
  - Education about person – vehicle fit
  - Several academic programs involving students
  - Excellent exposure to D&CM
Q & A

- Questions texted during the presentation will be addressed at this time
- Elin Schold Davis, facilitator
Thank You!
Elin Schold Davis, OTR/L, CDRS
Coordinator AOTA Older driver Initiative
escholddavis@aota.org

- [www.aota.org/olderdriver](http://www.aota.org/olderdriver)
  - Professionals, see TOOLKITS
- [www.nhtsa.gov](http://www.nhtsa.gov)
- [www.aded.net](http://www.aded.net)
- [www.adaptivemobility.com](http://www.adaptivemobility.com)
- Goggle: AMA Physician’s Guide, Older Driver