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**Alberta Health**

**Alberta Aids to Daily Living  
Large Bathing and Toileting Aids**  

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**Policy & Procedures Manual**

June 21, 2021

**Classification: Public**



## Revision History

Description	Date
Updates throughout to reflect transition of authorizations and claims to Alberta Blue Cross	June 21,2021
Updated links	April 1,2019
Policy G-05 to G-07: Changed to reflect repair options.	October 21,2016
Amalgamated policies to reduce redundancy. Updated format, added information and changed wording for clarity. Policy G-05: new Vendor and Trained Provider Qualifications policy. Guidelines and product specific information policy deleted – refer to APL and resource forms on website.	October 1,2016
Policy G-10: Removed. Information added to Approved Product List for one source information.	July 1, 2015
Overall manual formatting revisions, including reordering of policy numbers. Reflects removal of ability to recycle bathing and toileting benefits.	January 1, 2014
Overall manual formatting revisions, including updating of all policy numbers.	April 1, 2013
Policy G-01 to 03: Added minor wording to increase clarity.	April 1, 2013
Policy G-04: Added wording to increase clarity and be consistent with “B” and “C” benefits.	April 1, 2013
Policy G-06: Added wording to increase clarity and be consistent with “B” and “C” benefits.	April 1, 2013
Policy G-11: Separated K benefits to be moved under “K” manual, leaving “G” benefits.	April 1, 2013
Policy G-14: Added Artisan HD Tilt Commode. Was under G067, however, needed a separate catalogue number as it is not a shower commode.	April 1, 2013
Policy G-15: Products in “G” category. “K” benefits removed and resituated in “K” manual. (APL product lists revised to match).	April 1, 2013
Overall manual formatting revisions, including update of policy numbers.	January 1, 2014

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# Policy G – 01

## Large Bathing and Toileting Benefit Description

### Policy Statement

AADL provides funding for large 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.

AADL uses a benchmark model to fund large bathing and toileting benefits found on the Approved Product List APL-G. See Policy G-10 for definition of benchmark model.

Large bathing and toileting benefits include wheeled commodes, wheeled shower commodes with or without tilt, bathlifts and several basic replacement parts for this equipment. See G-APL for details.

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

Large bathing and toileting benefit authorizations are processed through the Alberta Blue Cross Online Health Portal (OHP). AADL Approved Manufacturers of these products are listed on the G-APL. Manufacturers may apply to become an AADL Approved Manufacturer at any time.

Large 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 a rental agreement with a large 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 large bathing and toileting equipment.

# Policy G – 02

## Eligibility Criteria

### Policy Statement

The Eligibility Criteria Policy assists clients, guardians, authorizers and vendors in identifying eligibility to access large bathing and toileting benefits.

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

A client's eligibility for large bathing and toileting benefits must be determined by an AADL authorizer prior to authorization.

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

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

AADL provides a limited number of bathing and walking benefits per eligible client based on current best practice and expected use.

The AADL Assessment Summary for Bathlift Benefit is required to confirm eligibility for the bathlifts funded by AADL. Forms are accessible at:

<https://www.alberta.ca/aadl-forms-and-documents.aspx>

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.
- Acute care clients except when part of a definitive discharge plan with location known.
- Options chosen for personal preference or options not supported by clinical rationale.
- Clients in congregate living sites under Supportive Living (Level 3 and 4) or Long Term Care.

## Procedure

### Authorizers:

1. Confirm client meets AADL general eligibility for benefits.
2. Confirm client's previous benefit consumption:
  - Refer to the Large Bathing and Toileting Benefits APL for quantity limits at: <https://open.alberta.ca/publications/aadl-program-manual-g>
  - Refer to the patient inquiry screen on the Alberta Blue Cross Online Health Portal (OHP) and check product consumption.
  - Submit authorization on the OHP with any relevant documentation including the client declaration form.
  - Refer to Policy G-07 Quantity and Frequency Limits for clients who are over quantity/frequency limit.
3. Inform clients of their eligibility status.

### Clients:

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

### Vendors:

1. Check clients' previous benefit consumption:
  - Refer to the Large Bathing and Toileting Benefits APL to determine quantity limits for each bathing or toileting benefit at: <https://open.alberta.ca/publications/aadl-program-manual-g> Refer to the patient inquiry screen on the Alberta Blue Cross Online Health Portal (OHP) review client's benefit consumption history and confirm they are eligible for the benefit.
  - Refer to Policy G-07 Quantity and Frequency Limits for clients who are over quantity/frequency limit.

### Alberta Blue Cross

1. Responds to telephone or email requests for information on bathing and toileting benefits eligibility and provides reference to the AADL website for further information at: <https://open.alberta.ca/publications/aadl-program-manual-g>
2. Adjudicates and audits authorizations and claims submitted through the OHP.

# Policy G – 03

## Authorizer Qualifications

### Policy Statement

The Authorizer Qualification Policy facilitates accountability and transparency.

AADL accepts applications from Occupational Therapists (OTs) and Physiotherapists (PTs) who meet the general eligibility set out in Policy GN-03 Application to be an Authorizer in the AADL General Policy and Procedure Manual at:

<https://open.alberta.ca/publications/aadl-program-manual-gn>

Large Bathing and Toileting Benefits are considered a primary product range for OTs and PTs as set out in Policy GN-03. See policy for further explanation on Primary and Secondary Product Ranges.

### Procedure

#### Authorizer Applicants:

1. Confirm eligibility.
2. Complete the authorizer application form at:  
<https://formsmgmt.gov.ab.ca/Public/AADL2218.xdp>
3. Complete the requisite authorizer training.
4. Register with Alberta Blue Cross as a provider once approved to an authorizer by AADL. .

#### AADL:

1. Provides authorizer on-line pre-requisite training module.
2. Provides training for primary product ranges.
3. Advises Alberta Blue Cross when the authorizer has completed the training requirement so they can be registered on the Online Health portal as a provider.
4. Monitors authorizer activities and determines compliance with policies and procedures.

# Policy G – 04

## Authorization Process

### Policy Statement

The Authorization Process Policy promotes effective and efficient authorization of benefits.

Large Bathing and Toileting benefit authorization includes the assessment, equipment trial and the submission of a valid authorization on the Alberta Blue Cross Online Health Portal (OHP).

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

Authorizations for Repair Benefits do not require authorization by an OT or PT. An authorizer, client or vendor may determine when the AADL-funded large bathing or toileting equipment requires a replacement part. Refer to Policy G-06: Providing Large Bathing and Toileting Benefits for details on providing replacement parts.

### Assessment:

Assessments for large bathing and toileting benefits funded by AADL - bathlifts, wheeled commodes and wheeled shower commodes must be completed and documented by an OT or PT trained in interventions related to mobility and basic bathing and toileting activities.

Assessments must be in the client's home environment; may use simulated home environment if able to replicate.

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 Approved Manufacturer listed on the G-APL that meets the generic description.

Large bathing and toileting equipment vendors will provide equipment for a trial period that must not exceed two days. At the end of the trial period, the equipment must be returned. The client may not keep the trial equipment.



### **Authorization Submission:**

Authorizations for large 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.

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.

## **Procedure**

### **Authorizers:**

1. Confirm client eligibility for benefit including residence and past consumption. Refer to Policy G-02 Eligibility Criteria – Large Bathing and Toileting Benefits.
2. Assess client or review assessment if assessor is not the authorizer. Client assessment must be completed in home or simulated home environment.
3. Trial equipment to ensure it is appropriate for client **in their environment**. Consider ability to move equipment in/out of bathtub or through doorways as appropriate. Review care and maintenance with client and/or caregiver.
4. Policies for the use of trial equipment should be explained to the client. See the form for client use: “AADL Trial Equipment Use” on the AADL website. Arrange for trial equipment to be returned to the vendor once the trial has been completed.
5. Document assessment details and clinical rationale to support the provision of large bathing or toileting benefit. This must be kept in the client's file and submitted to AADL upon request.
6. Determine where equipment is to be delivered and arrange for follow-up as appropriate.
7. Complete Authorization on OHP :
  1. Include information on met criteria establishing client's eligibility for accessories.
  2. **Include benefit number and brand and model of product.**
  3. Ensure the client understands any costs that they may incur. See Benchmark Price and Upgrade Costs under G-10 Definitions.
  4. Provide client with list of AADL Approved vendors.
  5. Client signs declaration form and it is uploaded with the authorization.
8. Advise client that AADL will not reimburse clients for any rental charges if the client chooses to rent equipment.

### **Clients:**

1. Fully participate in assessment.
2. Comply with trialing protocol - dry run only, do not sit on bathing/toileting aid with exposed skin.
3. Return equipment to AADL approved vendor after trial period is over.

4. Sign client declaration form signifying agreement and understanding.

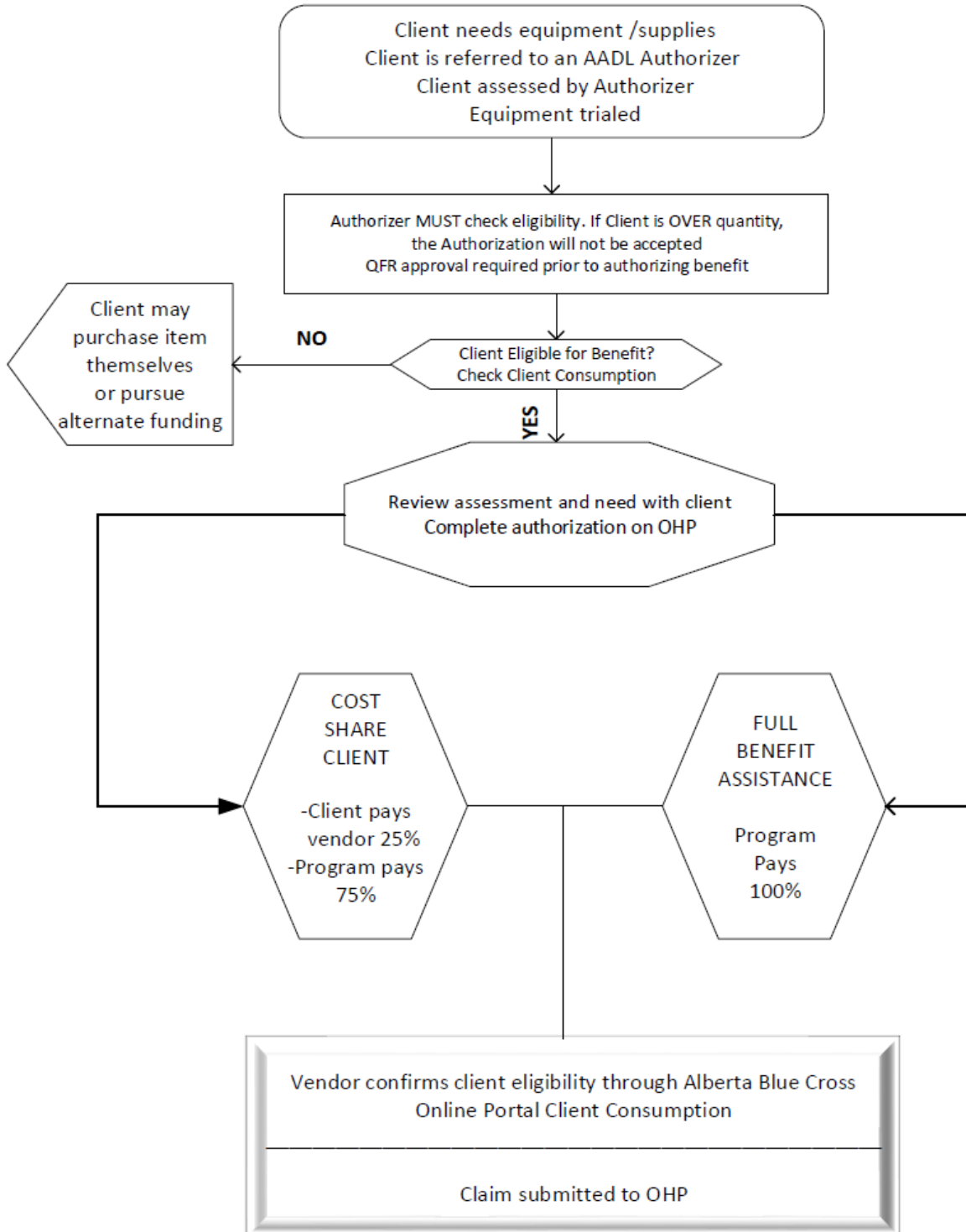
**Vendors:**

1. Provide trial equipment as requested by the Authorizer.
2. Check for authorization on the OHP and confirm eligibility by referring to client's consumption history.
3. Proceed to providing benefit.

**Alberta Blue Cross:**

1. Reviews authorizations for compliance and accuracy.
2. Processes valid authorizations.

## Authorization Process Flow Chart for “G” Benefits



# Policy G – 05

## Vendor and Trained Provider Qualifications Policy

### Policy Statement

AADL Approved Large Bathing and Toileting Equipment Vendors must meet the following criteria:

- Meet AADL's general vendor criteria as outlined in the General Policy and Procedures Manual.
- Adhere to benchmark pricing as outlined in the General Policy and Procedures Manual.
- Must have a service area allocated on the premise in order to provide replacement parts and small repair services on large bathing and toileting aids.

### Product/Equipment:

- Stock on site a minimum of each catalogue item grouping and a choice of two (2) different AADL approved manufacturers' products for each catalogue item grouping.
- Provide a distributor's agreement letter from the manufacturers represented for this benefit group to AADL.
- Vendors must carry common replacement parts listed on the APL for the equipment they carry.
- AADL Vendors must ensure large bathing and toileting equipment provided through AADL funding meet all quality standards set out in the Approved Product List.

### Trained Provider Qualifications:

- Maintain a minimum of one (1) staff member who is qualified to work on large bathing and toileting equipment. Qualifications are based on mechanical aptitude and experience with home medical equipment.
- Ensure staff is educated on AADL Policies and Procedures as stated in the most current AADL Program Manual, Approved Product List, and updates.
- Ensure staff has the necessary expertise regarding the provision of AADL benefits and associated invoicing and business processes.

## Policy G – 06

### Providing Large Bathing and Toileting Benefits – Supplier/Vendor Policy Statement

#### Policy Statement

The Providing Large Bathing and Toileting Benefits Policy promotes effective and efficient provision of benefits.

AADL Approved Vendors for Large Bathing and Toileting Benefits must meet certain qualifications. See Policy G-05 Vendor and Trained Provider Qualifications for details.

Providing Large 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.

The AADL vendor must offer the AADL client bathing and/or toileting equipment for a price equal to or below benchmark prices 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.

Vendors are responsible for the initial assembly and set up of all large bathing and toileting equipment provided to a client.

Vendors must carry common replacement parts for equipment they carry.

#### Procedure

##### Authorizers:

1. Arrange and be present for equipment trial in the home or simulated environment.
2. Review the equipment wear and care instructions, advise the client of policies around ownership and responsibility.
3. Follow up with client once equipment has been provided to ensure equipment meets needs.
4. Advise clients to contact the vendor if replacement parts are required.

**Clients/Caregivers/Guardians:**

1. Trial equipment to ensure equipment meets needs.
2. Receive bathing/toileting equipment and confirm satisfaction that the equipment fits and meets specifications.
3. Understand responsibility for the care and maintenance of the equipment as equipment is not replaced due to damage outside of normal wear and care.
4. Contact the vendor directly if the equipment requires replacement parts. Arrange to have the equipment repaired and maintained as needed.

**Vendors:**

1. Accept requests from authorizers for trial equipment and provide to clients.
2. Confirm eligibility for the benefit by checking client consumption on the OHP.
3. Collects any cost-share and any upgrade costs on the day the equipment is provided and the claim is submitted.
4. Submit claim on the OHP portal on the day it was provided to the client (service date)
5. Arranges shipping for clients in rural areas without local vendors. Maintains a copy of the waybill and provides to AADL on request.
6. Provides bathing /toileting equipment or replacement part and confirm satisfaction with delivery/service. Provides education (may be in the form of instruction manual) on care and maintenance with client/family/caregiver.

**Alberta Blue Cross:**

1. Adjudicates claim.
2. Audits charges on claims for equipment submitted by vendors and pays claims.

# Policy G – 07

## Quantity and Frequency Limits

### Policy Statement

The Quantity and Frequency Limits Policy for Large Bathing and Toileting Equipment benefits ensures transparency, consistency and accountability.

AADL sets annual limits on the number of large bathing and toileting equipment funded per eligible client based on current best practice and expected wear. See the Approved Product List – Large Bathing and Toileting Equipment for specific limits at:  
<https://open.alberta.ca/publications/aadl-program-manual-g>

AADL will fund one benefit per function; duplicate benefits are the responsibility of the client. For example if a client has a bathseat and/or a raised toilet seat, they are not eligible for a shower commode. Shower commodes are considered to meet both toileting and bathing needs.

Large 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.

A Quantity and Frequency Request (QFR) authorization is submitted on the Alberta Blue Cross Online Health Portal.

AADL **does not replace** equipment that has been lost, stolen, misused or damaged. Clients should purchase insurance to cover the cost of replacements should the equipment be lost, stolen, or damaged.

### Procedure

#### Authorizers:

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

3. Submit QFR authorization on the OHP and include the following documentation:
  - QFR Request Form.
  - Other supporting documentation.
  - Client declaration.

**Clients:**

1. Maintain care of the large bathing and/or toileting equipment to prolong life of benefit provided through AADL and to prevent need for premature replacement of benefit.
2. Consult with AADL authorizer when replacement of AADL equipment is required.
3. Ensure replacement equipment authorized meets their basic need during trial and when delivered.
4. Seek alternate funding for equipment needs that fall outside the quantity and frequency limits.

**Vendors:**

1. Identify need for QFR for those clients requesting equipment funded by AADL be replaced and advise clients. Refers these clients to an AADL authorizer for reassessment.
2. Educates client on wear and care of equipment, and availability of maintenance parts to prolong life of benefit.
3. Replaces or repairs equipment under warranty without cost to AADL.
4. Provides AADL funded replacement equipment to client when valid authorization has been confirmed.

**Alberta Blue Cross:**

1. Receives and log QFR requests.
2. Forwards QFR requests to AADL for adjudication.
3. Updates QFR status on the OHP which can then be viewed on the provider portal.
4. Notification of the decision will be sent to the client and authorizer.

**AADL:**

1. Receives the QFR and supporting documentation from Alberta Blue Cross.  
equipment
2. Adjudicates and provides decision to Alberta Blue Cross.



# Policy G – 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 large bathing and toileting equipment to ensure transparency, consistency and accountability.

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

Once the client no longer requires the equipment, it may be recycled within the community; however, it is **never to be resold** by a client, authorizer, or vendor. Once the equipment is recycled to another individual, it is not eligible for repair parts on the APL.

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

AADL Large Bathing and Toileting Equipment Vendors provide repair and maintenance services on AADL funded equipment.

AADL provides funding for some parts for repairs and maintenance to large bathing and toileting equipment. Refer to the AADL Approved Product List (APL) for specifics at: <https://open.alberta.ca/publications/aadl-program-manual-g>

Clients are responsible for the costs of maintenance and repairs outside those listed on the APL and for costs associated with privately owned equipment.

Vendors must provide the client with a copy of the claim summary identifying the serial number and model of the equipment funded by AADL. The client must keep this record for use as proof the equipment was AADL funded and in order to obtain AADL funded repair/maintenance parts.

### Procedure

#### Authorizers:

1. Ensure client understands responsibility for care, and maintenance of AADL-funded equipment.

2. Advise clients to keep a record of the initial claim summary from the vendor as well as any maintenance and repairs to equipment.

**Clients:**

1. Request information and/or equipment manual from vendor to become familiar with warranty, maintenance and repair recommendations from manufacturer.
2. Ensure reasonable care and maintenance of AADL-funded large bathing and toileting equipment.
3. Accept responsibility to obtain insurance in case of damage or loss of equipment.
4. Keep a record of the serial number, make and model on the vendor invoice as proof of AADL funding.

**Vendors:**

1. Review care and maintenance of AADL-funded large bathing and toileting equipment with clients. Provide manufacturer manual as available.
2. Ensure AADL Not for Resale Sticker is adhered to the equipment. On commodes, it is positioned on the back right side of the frame.
3. Advise if equipment is eligible for repairs to be funded by AADL.
4. Provide maintenance and repair services to AADL-funded large bathing and toileting equipment.
5. Collect any cost share or upgrade costs from the client prior to completing the repair.
6. Assist client when equipment is no longer economical to repair based on AADL standard formula – repair should cost less than 50% of cost of equipment purchased new.
7. If not cost effective to repair, advise client to get reassessed by an AADL authorizer for a replacement piece of equipment.
8. Submit claims for repair parts funded by AADL to the OHP.

**AADL:**

1. Provides funding assistance for repair parts (listed on APL) for AADL-funded large bathing and toileting equipment for first owner.

# Policy G – 09

## Refusal of the Equipment

### Policy Statement

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

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

Clients 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 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 QFR 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:

1. Advise client of the consequences of equipment refusal.
2. Complete a Quantity and Frequency Request authorization on the Albert Blue Cross Online Health Portal (OHP) for the item and upload the letter from the client (family/guardian/trustee) as supporting documentation
3. 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.

4. Complete Quantity and Frequency (QFR) form, attaches client letter and submits to the OHP which will be directed to AADL for review.

**Clients:**

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

**AADL:**

1. Receives the QFR and supporting documentation from Alberta Blue Cross and reviews the circumstances around the refusal of the equipment. A decision will be provided to Alberta Blue Cross.

**Alberta Blue Cross:**

1. Updates OHP with decision and sends notification to the client and the authorizer.

# Policy G – 10

## Definitions

### **Approved Products List (APL)**

The APL is a document on the AADL website outlining the products for which AADL provides funding. 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 large bathing and toileting equipment benefits are listed under the column Price Maximum in the APL.

### **Community Recycle**

AADL-funded equipment identified as community recycle may be recycled within the community. 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.

### **Equipment Trial**

An equipment trial is a trial that involves the client and caregiver trying the equipment 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. Trial equipment is provided by AADL Large Bathing and Toileting Equipment Vendors according to Trial Equipment Guidelines.

### **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 and the Client Declaration 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.