

The Systematic Development of a Clinical Wheelchair Checklist

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Objectives

- The participant will be able to describe the 3 standards for checklist development
- The participant will be able to list the 10 steps identified in the Wheelchair Assessment Checklist
- The participant will be able to explain the 5 benefits of a wheelchair checklist



Checklists

- “a list of things to be checked or done”
 - Merriam-Webster Dictionary

- “man is fallible, but maybe men are less so”
 - “The Checklist Manifesto: How to Get Things Right” by Atul Guwande



Checklists Utilized Today

- Construction
 - Communication
 - Efficiency
- Flight
 - Safety
- Medicine
 - Prevent Infection



Benefits

- Promotes organization
- Provides detailed ways to perform tasks
- Creates a systematic approach
- Provides accountability
- Reduces fallibility



Components of a Good Checklist

- Specific scope
- Short and simple
- Provides explanation and direction
- Easy to complete
- Correct format (Read-Do, Do-Confirm)
- Prevents fallibility
- Promotes control



Components of a Bad Checklist

- Confusing or too complex
- Too many items
 - More than 10
- No direction
- Repeated information
- Longer than 1 page
- Does not follow a checklist of completion



Standards for Checklists

- Development

- Identify
- Determine
- Produce
- Identify

- Drafting

- Create
- Refine
- Test
- Refine
- Test
- Refine

- Validation

- Finalize
- Plans for future



Identify a Problem

- Inconsistency in wheelchair evaluation
- Missing information while submitting to insurance
- Missing information from client
- Miscommunication within the evaluation team
- Duplication of outcomes and other variables



Determine the Goals

- Create a uniform evaluation
- Promote correct evaluation
- Reduce insurance denials
- Promote communication



Conduct a Literature Review

- Review any information related to wheelchair evaluation
 - National spinal Cord Injury Association (NSCIA)
 - Supplier forms
 - Clinician forms
 - World Health Organization Guidelines
 - Veterans Association Handbook 1173.6
 - RESNA Wheelchair Guidelines
 - Veterans Health Administration (VHA) Guidelines for Wheelchairs
 - Occupational Therapy Australia Guidelines



Identify Type of Checklist

- Read – Do
 - Read the checklist and do as you read depending on the situation
- Do – Confirm
 - Do the steps and verify
 - Wheelchair Evaluation Checklist



Create and Refine a Checklist

- Create
 - List everything that was found
 - Include everything in detail that will be included
- Refine
 - Refine the list to a limited number
 - Wheelchair Evaluation Checklist (10 steps)
 - Refine an expanded checklist for direction and aid to user



Test and Refine the Checklist (1)

- Test the checklist with a limited number of users
 - Wheelchair Evaluation Checklist (3 users in 1 clinic)
 - Checklist user was external to the evaluation
- Refine the Checklist
 - Use the feedback
 - Refine the checklist for real life experiences



Test and Refine the Checklist (2)

- Test the checklist with a larger group
 - Wheelchair Evaluation Checklist (6 users, 4 clinics)
 - Checklist users were external and internal to evaluation
- Refine the Checklist
 - Use the feedback from all users
 - Refine the checklist to reflect feedback



The Wheelchair Assessment Checklist

Wheelchair Evaluation Checklist Updated: 5/28/2015

Clinician Name: _____ Date: _____

- Review the reason for referral, records, demographics, and funding options
- Perform introductions, roles, responsibilities, delivery process, time frame, and client goals and priorities
- Perform assessments (i.e. cognition, strength, range of motion, balance, coordination, mobility, posture, skin integrity)
- Establish quantifiable means of measuring outcomes (i.e. FMA)
- Perform functional assessment (ADL's, IADL's)
- Assess participation (i.e. living situation, habitual assessment, leisure interests)
- Review the accessibility of natural environment (i.e. personal/private transportation, home, work, school, other resources)
- Perform device trials with all suitable devices
- Re-assess client goals and priorities
- Create a plan of action

Comments: _____



The Wheelchair Assessment Checklist

Wheelchair Evaluation Checklist (Expanded Guidance) Updated: 5/28/2015

Directions: Below are expanded items to consider for each item of the DRAFT Wheelchair Evaluation Checklist. This a DRAFT checklist so please provide comments and feedback at the bottom of the Checklist to help improve future versions. If there are any questions beyond the expanded list below, please contact Vince Schiappa by e-mail at vis19@pitt.edu or Mark Schmoler schmoler@pitt.edu.

1. Review reason for referral, records, demographics, and funding options
 - a. Clarify the reason for referral and what the client is interested in
 - b. Review past medical records (if applicable) to obtain information about the client
 - c. Review the demographic information
 - d. Identify funding source for evaluation an equipment
2. Perform introductions, roles, responsibilities, delivery process, time frame, and client goals and priorities
 - a. Everyone in the room introduces themselves as well as anyone who will be involved in the process who might be in the room at the moment (i.e. other clinicians, suppliers, manufacturer's representatives, students, interns, etc.)
 - b. Discuss the roles and responsibilities of each person in the process
 - c. Explain the entire process of evaluation to delivery
 - d. Explain the timeline from evaluation to delivery process to ensure client/caregiver knowledge
 - e. Assess the client goals and priorities based on their perception
3. Perform assessments (i.e. cognition, strength, range of motion, balance, coordination, mobility, posture, skin integrity)
 - a. Perform manual muscle testing
 - b. Test the range of motion and seating posture
 - c. Evaluate the cognitive ability of the client
 - d. Mobility testing (i.e. Timed up and go test, 6 minute walk test)
 - e. Transferring

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4. Establish quantifiable means of measuring outcomes (i.e. FMA)
 - a. Decide which outcome measure to use and how you will gather information at time 1 and time 2
5. Perform functional Assessment (ADL's, IADL's)
 - a. Record activities of daily living
 - i. Hygiene
 - ii. Bathing
 - iii. Eating
 - iv. Dressing
 - b. Record instrumental activities of daily living
 - i. Laundry
 - ii. Cooking
 - iii. Cleaning
 - iv. Home management
6. Assess participation (i.e. living situation, habitual assessment, leisure interests)
 - a. Discuss where the client lives and what kind of residence they live in
 - b. Discuss what the client does or is interested in doing
 - c. Review the clients daily routine
7. Review the accessibility of natural environment (i.e. personal/private transportation, home, work, school, other resources)
 - a. Discuss the accessibility of the home
 - b. Discuss the work status of the client
 - c. Discuss the educational status of the client
 - d. Discuss how the client travels (i.e. public transportation, travels as a passenger, drives with hand controls, etc.)

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8. Perform device trials with all suitable devices
 - a. Allow the client to try different devices within the clinic, outside, on an incline/decline, in an elevator, and in a bathroom
9. Re-assess client goals and priorities
 - a. Discuss realistic goals and expectations after the client is able to try different devices
10. Create a plan of action
 - a. Discuss what will occur next
 - b. Discuss when a home visit will occur
 - c. Discuss when the device may arrive and where it may arrive
 - d. Discuss any further contact that may happen

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Finalize the Checklist

- Finalize the 10 steps of the checklist
- Finalize all instructional material
- Distribute the checklist to a larger user set
- Plan for future
 - Obtain statistics to show it works
 - Compare denials and approvals of LMN's
 - Form sub-checklists to cover a larger population



Contact Information

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