

WRITE IT RIGHT: A GUIDE TO FUNDING REQUESTS

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Writing funding requests can be a challenge for many occupational and physical therapists, especially in times of expanding caseloads and limited indirect time. From the funder's perspective, funding requests vary drastically in format per writer, per employer, per health region/authority, per province, etc., and this variability can make it incredibly difficult for the reader, who may or may not have any health care background, to find the necessary reasoning to approve and fund the request. In essence, a well-written and clear funding request allows the reader to easily determine what is needed for the client and an explanation of why.

Key components and elements in a funding request

The ability to create a concise yet comprehensive funding request is a skill that can be developed and enhanced in order to achieve the best possible outcome for the client. At the very least, a basic knowledge of the funder's relevant policies, procedures or standards is a critical yet often overlooked piece of this puzzle. In any funding request, "documentation should be client-specific and refer to the client's identified problems and goals, providing a clear account of the client's physical, functional, and environmental needs" (RESNA, 2011, p.9), and how these relate to the funder's relevant standards.

Effective documentation of a funding request should include:

1. Date of the report
2. Clear outline of what is being requested
3. Clinical summary of the client's status (medical, physical, functional, environmental)
4. Clinical justification for the request
5. Legible name and contact information
6. Signature

Clinical justification/rationalization for the request

The justification in a funding request is the written demonstration of the therapist's clinical reasoning involved in selecting the recommended equipment. It should include specific, detailed information about the clinical rationale for the selected product(s) and components, including the client's involvement in the selection process. As Mortensen & Miller (2008) note, environmental factors play a critical role throughout any equipment selection process, as they influence which goals are deemed realistic, what equipment is available, and what may or may not be funded.

When specific products, features or upgrades are recommended, the request should clearly indicate why other less-expensive or standard options would not meet the client's needs, including a brief outline of what products were evaluated and failed to meet the client's needs/goals as well as products that were considered and ruled out (RESNA, 2011).

Ethical issues and considerations

Do our current policies serve to narrow the choices for people rather than expand them and what can or should we do about this? As Pedersen et al note, "probably the most unjust policy is that any mobility base, power or manual wheelchair, will only be approved if it is required for mobility-related activities of daily living (ADLs) in the home" (2014, p. 648).

Do we as therapists and industry have a role in advocacy? If so, what should that be and how to do we go about changing policies and practices?

Wants versus needs...is this even a just or relevant discussion?

References:

1. Rehabilitation Engineering & Assistive Technology Society of North America. RESNA Wheelchair Service Provision Guide (2011) Retrieved from <http://www.resna.org/sites/default/files/legacy/resources/position-papers/RESNAWheelchairServiceProvisionGuide.pdf>
2. Mortensen, W.B., Miller, W. The Wheelchair Procurement Process: Perspectives of Clients and Prescribers. Canadian Journal of Occupational Therapy 2008 75 (3): 167-175.
3. Pedersen, J.P, Harmon, D., Kirschner, K.L. Is an Appropriate Wheelchair Becoming Out of Reach? Physical Medicine and Rehabilitation 2014 6: 643-649.

Speaker Bio:

Sandy Daughen is an occupational therapist with 20 years of experience in both the public and private sectors, and across practice settings including long-term care, acute care, and community. She has reviewed equipment funding requests for several public sector agencies over the past 10 years and written her own fair share of funding requests, not always successfully. She is currently a Field Occupational Therapy Services Officer with Veterans Affairs Canada and contracts with Non-Insured Health Benefits, Health Canada.