A ROADMAP FOR STARTING A DRIVING EVALUATION PROGRAM
By Susan Pierce, OTR/L, FAOTA, SCDCM, CDRS

Much research and planning should be done by a facility prior to advertising a driving evaluation program and accepting referrals. A solid foundation built around the necessary administrative and medical support is crucial to the successful development of a driving evaluation program. The therapist who wants to become involved in driving evaluation or rehabilitation services should have advanced knowledge and skill to be qualified and prepared to perform a comprehensive driving evaluation by the industry approved standard of care.

The following roadmap is recommended as an orderly method for developing a driving program or for someone transitioning into the role of the driving specialist. Completion of each step should be finished before the first referral for driving is accepted.

1. Examine the demand and the potential need for the service in your area and explore potential referral pathways.
   - Determine the primary diagnoses that your driving program would service.
   - Discover your competitors in the state or region. Gather as much information as you can about their program such as costs, vehicles they have, how long in existence, do they work with new drivers, are they members of ADED, etc.

2. Inquire of any state requirements for a driving evaluation program through the state department of motor vehicles, Medical Review Board or department of driver licensing (www.aamva.org)
   - Do you have to be a commercial driving school or instructor in your state. What are the requirements to fulfillment?
   - service provider requirements by such funding programs as the Department of Vocational Rehabilitation or Workers Compensation Fund.

3. Explore the possibility of obtaining proper liability insurance for the program and/or insurance for the evaluation vehicles.

4. Explore membership in the Association of Driver Rehabilitation Specialist (ADED) and the American Occupational Therapy Association (AOTA). Access all resources and material available from both organizations.
   - AOTA professional documents that addresses driving as a specialty area
   - ADED printed materials on program recommendations and standards
   - Know all industry approved processes, standards, and program recommendations.
5. Google and read the many articles, resources and research available on the internet.

6. Create a library of resource books, pamphlets or brochures for yourself and clients from various resources such as NHTSA, Hartford Company, ADED, AOTA, AARP, AAA, etc.
   - Obtain a copy and become familiar with:
     - the AMA Physician’s Guidelines

7. Make a list of the adaptive equipment and instructor equipment you will need in your evaluation vehicle or as demonstration in your office.
   - Write an email to all driving equipment manufacturers and introduce yourself and your program. Equipment donations are known to happen
   - Request brochures with MED listing in your area
   - Obtain information at the manufacturer’s website
   - Request printed brochures for client education

8. Establish acquaintance with several experienced driver rehabilitation specialists who are willing to provide mentorship to you. Be respectful and understanding of his or her time. You must understand someone who does not wish to “help the competition.”

9. Complete a program comparison and profile from facilities or programs in your state or region. Note:
   - age of the program
   - structure of their program
   - number of referrals they have annually
   - age and disability of clients they serve
   - charges for driving evaluation and driver training
   - do they see new drivers or only experience drivers?

10. Collect car manufacturer’s brochures or download information from their websites so you can become familiar with specific vehicles on the market.
    - collect information on models and makes of cars, trucks, and mini-vans
    - study different dash styles, seats, secondary controls, technology safety features
    - shop a vehicle for your program that has room
      - as room for adaptive equipment
      - for a variety of body sizes and disabilities without a lot of technology complexity

11. Visit website of National Mobility Equipment Dealer Association (NMEDA) for a
listing of the members in your area.

- visit the MED vendor’s websites
- make an appointment with all of the local or nearby vendors to meet and see their facility
- what product manufacturer do they prefer?
- are they open to install some of your preferences
- What inventory do they keep in stock
- ask for hands-on demonstrations
- go with specific questions and TAKE NOTES! Be objective!
- remember, they are trying to convince you that their shop is the best and their product line is the best product.
- in return you may need to convince them that you are the best evaluator and have some different products that you would like them to carry for your clients’ needs
- keep comparison lists of each MED’s pricing and on-shelf inventory for future reference
- do not give clients the prices as that is not your job

✔ 12. Plan a visit with a large comprehensive driving program preferably in a setting similar to your own. Expect to pay a consultation fee.
   - Go prepared! Don't go until you have done numbers 1 through 11
   - Have a list of specific questions
   - Don't ask "Tell me all about your program" or "tell me how to set up my program"
   - Ask specifically about their billing/reimbursement, vehicles, evaluation tools and procedures.
   - **No question is a dumb question but don't be a sponge.** We all learned in this area by asking questions. Learning and growth develop from personal experience with good guidance.
   - Some programs may not be willing to just hand everything about their program to you.
   - Don't have unrealistic expectations of the visit. You will not walk away from this visit being a qualified DRS. Most DRS are very busy all of the time and their time is precious. You have to bend to their schedule.
   - Request, before the visit, if you could observe several evaluations. This may not be allowed in-clinic or in-car.
   - You should provide the structure for the day. Compiling a list of objectives and sending it to the person prior to the visit would help the DRS in planning the day at their facility.

10. Design the necessary evaluation forms for your program.
   - Do not copy from other driving programs’ form but look at
them.

- Your form must work for you.
- Don't let a form restrict you or be time consuming.
- Consider what you want to evaluate and what information you need to obtain from the client.

- Five suggested sections for an initial driver evaluation report form:
  1) Medical/personal history
  2) Clinical evaluation
  3) Vehicle and equipment assessment
  4) Behind-the-wheel assessment
  5) Summary and recommendations

11. Write program policies and procedures. Examples of suggested areas are:

- delineation of the comprehensive driver evaluation process at your site
- how to receive referrals
- requirements prior to appointment
- client check-in process
- charges, billing codes
- prescription writing procedures
- handling referral to other services
- vehicle maintenance procedures
- procedure in case of being involved in a crash
- documentation and communication procedures with HIPAA consideration

12. By now, you should be able to realistically determine the level of evaluation skill for your program. Cost projections for the program can be finalized. A few cost saving hints:

- explore donations of equipment by manufacturers or local dealers
- utilize OT clinical evaluation tools already available
- find used or refurbished equipment
- seek financial assistance from local service clubs or grant monies

13. Confirm administrative, physicians and other professionals support for the driving program.

14. Obtain professional liability insurance for yourself (in addition to what your employer provides).
15. Create a website and email address specific to driving, if possible. Almost a must these days. Maybe your program can link easily from the facility’s website.

- A lot of business transpires now over the internet through websites and emails.
- Referral forms can easily be sent to client or family member by email.
- After scheduling appointment can then send appointment letter and directions.
- Saves money, paper and mostly time.

13. Practice the clinical testing you will be using.
- It is a must that the evaluator performs the entire clinical evaluation from beginning to end including testing.
- Trailmaking was created by the military and is in public domain. There are no limitations on who can give this test.
- Do not worry if the client has already taken the test. Your results will be valid.
- The OT specialist must be able to use the tests with evidence-based practice in our field.
- You learn so much within the first minutes of observing and talking with the client, and then you continue to learn as you observe their performance and behavior during the tests.
  - You cannot learn this type of information by another professional giving the tests and then reporting the results to you.
  - The OT profession has always done cognitive testing so be an OT and perform the tests that you are qualified for per the test manufacturer.

- If you will perform the in-vehicle work, practice the physical, verbal and visual skills in your car that you have been taught.
- If you are to be in the back seat, what and how will you be observing and assisting.
- Determine who will decide the outcome and how it will be presented to the client and family.
- It is good to practice giving various answers, particularly to older clients and their family. Use a family member or co-worker to practice your wording and presentation.

15. Begin marketing the program and service.
- ♦ plan and provide in-services everywhere!
  - in-house first
  - in local community to referral sources and agencies
  - service organizations like senior resource centers
➤ local stroke groups such as the SCI or MS monthly support group.
➤ plan an Open House
➤ mail out your brochure and business cards to physicians, therapists and other referral sources
➤ introduction letter is helpful as it can provide some basic referral information to the referral source.
  ▪ indicate when the service will start
  ▪ a simply stated referral process with any referral forms that the source may need. Maybe the doctor only needs the medical approval form but the MS group will hand out any referral form that is used
➤ be ready and prepared to give your cost and justify it without defensiveness.
  ▪ you are worth what is charged
  ▪ be confident in your worth and in your presentation
  ▪ the importance of a driving evaluation is no different than the importance of an MRI to assist the doctor in a medical decision. A specialist will perform the MRI. Just as a specialist will perform the driver evaluation.
    • Have you had an MRI recently?
    • What was your co-pay?
    • There is no difference in a higher cost for a specialized service