1. **Purpose**
   The purpose of this policy is to establish criteria for the medical necessity of Activities of Daily Living (ADL) training and Self-Care Management training.

2. **Definitions**
   Activities of daily living training and self-care management training is defined as direct one-on-one supervision and instruction in the performance of essential age appropriate activities of daily living related to the patient's health and hygiene. This is including, but not limited to compensatory training for a patient's impairments, meal preparation, safety procedures, personal hygiene including bathing and use of a toilet and instructions in the use of assistive technology devices and/or adaptive equipment. These procedures are timed services and should be reported for each 15 minute time period performed.

3. **Statement of Policy**
   3.1. The determination of medical necessity for the performance of activities of daily living training and self-care management training is always made on a case-by-case basis.

   3.2. Activities of daily living training and self-care management training may be considered medically necessary for patients who are impaired as a result of a developmental disability, injury, illness or surgery and require supervised training to help perform their normal activities of daily living which include, but are not limited to bathing, grooming, dressing, eating, preparing meals, toileting, and transfers.

   3.3. Activities of daily living training and self-care management training are considered medically necessary only when it requires the professional skills of a licensed health care provider, is designed to address the specific needs of the patient, and must be part of an active treatment plan directed at a specific outcome.

   3.4. To be considered medically necessary, there must be a reasonable expectation that the patient's functional level will improve as a result of this intervention. Once the patient is independent in performing their activities of daily living, further skilled training is considered not medically necessary.

4. **References**
   4.1. Scientific:
The following scientific references were utilized in the formulation of this medical policy. Triad Healthcare, Inc. will continue to review clinical evidence surrounding Activities of Daily Living (ADL) training and Self-Care Management training and may modify this policy at a later date based upon the evolution of the published clinical evidence. Should additional scientific studies become available and they are not included in the list, please forward the reference(s) to Triad Healthcare, Inc. so the information can be reviewed by the Academic Advisory Committee (AAC) and the Medical Quality Improvement Committee (MQIC) to determine if a modification of the policy is in order.


- Finlayson M, Mallinson T, Barbosa V. Activities of daily living (ADL) and instrumental activities of daily living (IADL) items were stable over time in a longitudinal study on aging. *J Clin Epidemiol.* 2005 Apr;58(4):338-49.


• Reed K, Sanderson S. *Concepts of Occupational Therapy Practice* Baltimore: Lippincott Williams & Wilkins, 1999.


• Trombly C., ed. *Occupational Therapy for Physical Dysfunction* Baltimore: Williams & Wilkins, 1995.


### 4.2. Related Triad Medical Policies:

- **TMMP 18 - Medical Necessity**
- **TMMP 13 – Use of Adjunctive Modalities and/or Therapeutic Procedures**
- **TMMP 10 – Use of Passive and Active Care**

### CPT Codes

This policy relates to the use of the following CPT Codes:

<table>
<thead>
<tr>
<th>CPT Codes</th>
<th>Description (AMA CPT Guide)</th>
</tr>
</thead>
<tbody>
<tr>
<td>97535</td>
<td>Self-care/home management training (e.g., activities of daily living (ADL) and compensatory training, meal preparation, safety procedures, and instruction in use of assistive technology devices/adaptive equipment) direct one-on-one contact, each 15 minutes</td>
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</table>

This list may not be all inclusive and is not intended to be used for coding/billing purposes.

### Table of Revisions

<table>
<thead>
<tr>
<th>Revision Date</th>
<th>Modified By</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>06/23/2014</td>
<td>Level 1, 2, 3</td>
<td>Annual Review. CPT Code Description for 97535 updated.</td>
</tr>
<tr>
<td>06/10/2013</td>
<td>Level 1, 2, 3</td>
<td>Annual Review. Description (AMA CPT Guide) of CPT code 97535 updated. §3.3. revised for grammar.</td>
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<tr>
<td>08/06/2012</td>
<td>Level 1, 2, 3</td>
<td>Annual Review.</td>
</tr>
<tr>
<td>07/22/2011</td>
<td>Level 1, 2, 3</td>
<td>Annual Review. §2. added age appropriate to definition. §4.2. added reference to TMMP 13 – Use of Adjunctive Modalities and/or Therapeutic Procedures and TMMP 10 – Use of Physical Modalities and Therapeutic Procedures. Removed §5., Attachments and §5.1 Provider Manual as the provider manual has been re-written administratively. Added CPT Code table.</td>
</tr>
<tr>
<td>Revision Date</td>
<td>Modified By</td>
<td>Description</td>
</tr>
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<td>---------------</td>
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</tr>
<tr>
<td>08/09/2010</td>
<td>Level 1, 2, 3</td>
<td>Annual Review. No change.</td>
</tr>
<tr>
<td>08/04/2009</td>
<td>Level 1, 2, 3</td>
<td>Annual Review. No change.</td>
</tr>
<tr>
<td>09/25/2008</td>
<td>Level 1, 2, 3</td>
<td>New medical policy.</td>
</tr>
</tbody>
</table>

Triad’s Medical Policies are not recommendations for treatment and providers are expected to exercise their clinical judgment in providing the most appropriate care. Health care providers and patients should not rely on these Medical Policies in making health care decisions. These Medical Policies are guidelines and do not constitute an authorization, certification, explanation of benefits or guarantee of payment. Applications of Triad’s Medical Policies are determined by the enrollee’s benefit documents and contracts and as such individual benefits must be verified. Determinations of medical necessity apply only if the benefit exists and no contract exclusions are applicable. In the event of a conflict, a participant’s benefit plan document shall supersede the information contained in Triad’s Medical Policies.