

Our File/N/Réf. 14-8-2000  
Your File/V/Réf.

**DEFERRED**

DATE: 14 June 2000

TO/DEST: Co-ordinator, Transit Services Committee

FROM/EXP. General Manager

SUBJECT/OBJET: **PARATRANSPO ELIGIBILITY CRITERIA  
AND REGISTRATION PROCESS**

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### **DEPARTMENTAL RECOMMENDATION**

**That the Transit Services Committee recommend the Commission approve the implementation of Phase One of the new Para Transpo eligibility criteria and registration process effective September 1, 2000 and approve in principle the implementation of Phases Two and Three early in 2001, pending further public input.**

### **BACKGROUND**

At the December 17, 1999 Transit Services Committee 2000 budget meeting, the following recommendation was approved:

*That the review of eligibility for Para Transpo be completed by June 2000 and that any freed up service be re-deployed to customers who cannot use regular transit.*

This is in line with one of the recommendations of the Comprehensive Review of OC Transpo completed in February 1999. It was also one of the specific actions that Management proposed in June 1999 in response to the Comprehensive Review report.

### **SUMMARY**

A proposal has been developed, in consultation with the Accessible Transit Advisory Committee (ATAC), to change the Para Transpo registration process to make it more effective in providing service to those who have no other transportation alternatives. The new process is modeled on the one which was successfully introduced in Toronto, with changes to reflect the needs of Para Transpo customers. The main difference between the Toronto process and the one we are proposing is that in Toronto all applicants must go through an in-person interview and there are no application forms. Our proposal requires that all applicants submit an application form and

only those whose eligibility is unclear will be required to attend an in-person interview and/or physical assessment. General information on the registration process presently used by Toronto Transit's Wheel-Trans service is attached for your information. (Annex A).

The present Para Transpo eligibility criteria is based on an applicant's physical functional mobility, and restricts the use of Para Transpo to those who are physically unable to walk 175 metres or climb the steps of OC Transpo's regular transit buses. The proposed eligibility criteria, which is presently used in Toronto, is also based on an applicant's physical functional mobility but eligibility is determined based on an individual's level of physical functional mobility in the home, within the area immediately surrounding the home, and in the community at large, as well as permanency of disability. A point system similar to Toronto's will be used to determine eligibility.

The intent of the new criteria and registration process is to provide a reliable service over the long term to those who have the greatest functional need for accessible transit.

The proposed eligibility criteria and registration process will likely not extend service to many of those who would presently not be considered eligible for service. However, we are initiating a study to identify the transportation needs of all people with disabilities, determine how they are currently being met and to develop a proposal to address these needs.

Our proposal is to introduce the new registration process in three phases. The first phase would be implemented in September 2000 and would include a new more detailed registration form, still requiring the signature of the applicant's health care professional. It would also include the introduction of a small one-time only registration/administration fee, and the possibility of an in-person interview and/or physical assessment for some applicants whose eligibility is unclear. The second phase, which could be introduced early in 2001, would remove the requirement for the applicant's health care professional to sign the registration form, would increase the registration/administration fee, and would expand the number of in-person interviews and physical assessments. The third phase, which could also be introduced early in 2001, would see the re-registration of the existing Para Transpo registrants, using the same method as for new users.

## DISCUSSION

Para Transpo services are intended for persons who are physically unable to climb or descend steps used on conventional public transportation facilities or walk a distance of 175 metres.

To qualify for service an applicant must have their health care professional complete and sign a Para Transpo application form indicating that they cannot perform the physical tasks listed above.

Presently only 30% of Para Transpo registrants use a wheelchair or scooter while 70% are classified as ambulatory. There is a general feeling amongst registered users that some health care professionals have placed persons on Para Transpo service who could use OC Transpo's conventional transit system, which has reduced the services available to those who have no other transportation alternatives. It is quite likely that many of Para Transpo's ambulatory clients could use regular transit for at least some of their trips and in some cases all their trips.

In 2000, Para Transpo will provide over 750,000 single trips to approximately 9,000 registered customers. However, with the available resources, Para Transpo cannot meet the transportation needs of all its registered clients. Last year Para Transpo could not accommodate 35,000

customer trip requests and in 2000, even with an increase in resources and productivity increases there will likely be close to 30,000 customer trip refusals.

With the aging of society and as persons with disabilities become increasingly integrated into mainstream society, there will be pressures to increase the services provided by Para Transpo. It is, therefore, important that Para Transpo services be provided only to those disabled persons who legitimately require a door-to-door specialized transit service.

To ensure that the available resources are used to provide service to those who have the greatest functional need for specialized transit service, OC Transpo, in consultation with the Accessible Transit Advisory Committee, has developed a new eligibility criteria and registration process.

### THE NEW ELIGIBILITY CRITERIA

The present Para Transpo eligibility criteria is based on an applicant's physical functional mobility, and restricts the use of Para Transpo to those who are physically unable to walk 175 metres or climb the steps of OC Transpo's regular transit buses.

The proposed eligibility criteria, which is presently used in Toronto, is also based on an applicant's physical functional mobility but eligibility is based on an individual's level of physical functional mobility in the home, within the area immediately surrounding the home, and in the community at large, as well as permanency of disability.

Some of the factors that will be considered when determining eligibility are:

One's functional need for a modified vehicle;

- Permanency of disability;
- Means of functional mobility in the home;
- Means of functional mobility in the area immediately surrounding the home;
- Means of functional mobility in the community at large;
- Use of assistive device - convenience versus need;
- Use of Para Transpo's specialized service - convenience versus need.

The intent of the new criteria and registration process is to provide a reliable service over the long term to those who have the greatest functional need for accessible transit.

The proposed eligibility criteria and registration process will likely not extend service to many of those who would presently not be considered eligible for service. However, we are initiating a study to identify the transportation needs of all people with disabilities, determine how they are currently being met and to develop a proposal to address these needs.

### THE NEW REGISTRATION PROCESS

To ensure that the available resources are used to provide service to those who have the greatest functional need for specialized transit service, a new more detailed registration process has been developed. The proposal is to implement the new process in three phases:

#### Phase One (effective September 1, 2000)

- 1) A person contacts Para Transpo by phone to request an application form

2) Para Transpo provides the potential applicant with basic information over the phone and sends them an updated application form which explains in detail:

- who qualifies for Para Transpo service;
- what process is used to determine eligibility, including the fact that their health care professional will be required to complete the form, that there will be a small one-time only registration/administration fee and that some applicants may also be required to go through an in-person interview and/or a physical assessment.
- the application form will contain more detailed information including the following, which will help clarify who does and does not qualify for Para Transpo service:
- Para Transpo eligibility is based on physical functional mobility and an individual's need for specialized transit will be based upon the individual's level of physical functional mobility in the home, within the area immediately surrounding the home, and in the community at large, as well as permanency of disability;
- this eligibility guideline has been developed with a view to providing a reliable service over the long term to those who have the greatest functional need for specialized transit service;
- Para Transpo is not a service for persons who have at times experienced difficulty in using OC Transpo's fixed route service. It is also not meant to replace OC Transpo's fixed route service when the fixed route service is limited, not operating or not convenient. Eligibility is not based on age, income or the availability of others to travel with them on regular transit.

With the above additional information provided to the applicant and/or their health care professional early in the registration process, the number of applications submitted to Para Transpo by persons who do not meet Para Transpo's eligibility criteria will likely decrease.

- 3) The application form will be the first stage of the registration process and the health care professional will be required to provide more details on the applicant's physical functional mobility. The applicant will be required to submit to Para Transpo by mail or in person, the completed application form and a one-time only \$20 Para Transpo registration/administration fee. Like the previous application form, there will be no requirement for the health care professional to provide medical information.
- 4) Upon receipt of the completed application form and registration/administration fee, Para Transpo administrative staff would determine whether the applicant qualifies for service based on the information available or whether the applicant must go through the second phase of the registration process.
- a) Those applicants that Para Transpo staff determine are qualified for service will be sent their Para Transpo registration number as well as a customer information package (as they are today).
  - b) Those whose eligibility for service cannot be determined based on the information provided on their application form, will be sent a letter indicating that they must go

through Phase Two of the registration process. These individuals will be advised that they must go through an in-person interview before we can determine whether they meet Para Transpo's eligibility criteria. They will be asked to call Para Transpo to set up an appointment. It is expected that interviews could begin as early as September 2000, however initially only a small number of applicants will be requested to go through the in-person interview process while the process is being streamlined.

- 5) In Phase One, the interviewing panel would include at least one Para Transpo employee who is familiar with all areas of the registration process. There will be additional costs associated with this process and appropriate training of those who are conducting the interviews will be required. However, it is expected that the costs associated with Phase One of the new registration process will be covered partially by the registration/administration fee and the remainder of the costs would be absorbed by Para Transpo's existing budget. Eventually the complete interview process could be handled through a contract with an outside agency as is done in Toronto.

Each interview will likely take approximately 15 minutes and all applicants participating in the in-person interview will receive notification by mail of the results of the interviews. A point system will be used to determine eligibility as is done in Toronto's Wheel Trans system. However the Toronto model will be adapted as required to meet Para Transpo's needs.

a) Approved customers: (please see 4 a).

b) Ineligible customers:

Ineligible customers will receive a letter advising them that they do not qualify for Para

Transpo service however they may appeal this decision by submitting further documentation, within 21 days of receipt of notification of the decision, which supports their need for Para Transpo service. The supporting documentation does not need to be from a doctor and may be submitted by the applicant or any other person who can best describe the person's need for specialized transportation. The information will be reviewed and, if required, the customer will be asked to attend an appeals interview in which a functional physical assessment may be conducted. The appeals interview would likely be conducted by a health care professional (an occupational therapist or a physiotherapist) or by a panel which would include a health care professional. If service is denied at the appeals process, the customer will be notified that no further appeals will be considered. The appeals process and the specifics of the physical functional assessment would be developed this summer with the assistance of a health care professional.

### Phase Two (Beginning early 2001)

In Phase Two, much of the proposed registration process would remain the same. However, based on the work that will be completed during Phase One, we would be in a position to implement some or all of the following changes as well as other changes that may result from the additional public input we receive in 2000:

All applicants would still be required to submit a similar application form, but it would be completed and signed by the applicant or person responsible for the applicant. A health care professional's signature would not be required.

Para Transpo's one-time only registration/administration fee would be increased to more accurately reflect the actual costs associated with the new registration process. Many doctors are presently charging their patients for the completion of the Para Transpo application form, so the one-time registration/administration fee would replace this fee and would provide Para Transpo with new revenue which would be used to cover some of the additional costs associated with phases two and three of the new registration process. The registration/administration fee would also have the effect of reducing the number of applications submitted by some organizations who sometimes attempt to register the majority of their clients whether they qualify for service or not.

During this phase of the registration process, the in-person interview and/or physical assessment process will be used considerably more than in Phase One which will require additional resources but will ensure that only those who meet Para Transpo's eligibility criteria are registered for service.

#### Phase Three (Beginning early 2001)

Phase Three would involve the re-registration of the existing Para Transpo customers. This would be a long process and would require additional resources to re-register approximately 9000 Para Transpo customers. The work could be done by an outside agency as is done in Toronto or it could be done internally if additional staff were made available. The one time only registration fee per client would cover at least part of the cost of the re-registration. All Para Transpo clients would have to re-register by submitting a completed Para Transpo application form but not all would have to go through an in-person interview and/or physical assessment. It is likely that some of Para Transpo's more mobile customers would not qualify for service which would free up service for those remaining clients who need the service the most.

#### CONSULTATION

Meetings on specialized transit eligibility and registration processes have been held with a number of other transit systems. The proposed Para Transpo registration process uses many of the demand management strategies that are presently being used in other municipalities.

OC Transpo has also worked closely with the Accessible Transit Advisory Committee to develop this new process. Additional public input will be sought throughout 2000 and will be taken into consideration during the implementation of phases two and three of the new registration process.

## FINANCIAL IMPLICATIONS

It is expected that the cost of Phase One of the proposed Para Transpo registration process, which would be scheduled for implementation in September 2000, would be covered by customer registration/administration fees and by Para Transpo's existing 2000 budget. The costs to expand the process to Phases Two and Three will be included in the proposed 2001 Para Transpo budget.

## TRANSPORTATION NEEDS OF OTHER PERSONS WITH DISABILITIES

There are many persons with disabilities who do not presently qualify for Para Transpo service. Most of these individuals can use conventional transit services with the assistance of a companion to provide direction and to ensure their safety, and most are currently receiving transportation through other means.

The proposed new eligibility criteria and registration process will likely not place many of these individuals on Para Transpo. However the transportation needs of all persons with disabilities are presently being investigated by OC Transpo.

OC Transpo has issued a request for proposal for a consultant to produce a report which will identify the transportation needs of persons with disabilities within the Ottawa-Carleton Region, as well as the resources that are currently used by other community services to provide disabled persons with transportation. The consultant will also be expected to develop a model to meet these needs, together with realistic cost estimates, using the most appropriate mode of service delivery available from public, private, volunteer, conventional or specialized service depending on the individual's functional disability.

The report will list all the categories of persons who have difficulty using conventional transit for whatever reason based on disability, and will indicate the extent of the potential demand for transportation from these groups, as well as the extent to which the demand is currently being met by whatever means.

Before the contract is awarded, a report will be submitted to the Transit Services Committee.

## OTHER DEMAND MANAGEMENT STRATEGIES

Several demand management strategies have been implemented by Para Transpo over the last few years. This had had the effect of increasing the availability of service for those Para Transpo customers who generally have no alternate means of transportation.

A new reservation process was implemented in May 1996 that virtually guaranteed service for clients who use a wheelchair or scooter.

In June 1999, Para Transpo implemented a cancellation and no show policy which has significantly reduced customer cancellations and no shows and has resulted in the provision of more service to more clients.

Also in June 1999, a top-up of one ticket or \$1.25 was introduced for customers using the seniors' pass. This has reduced the demand from senior pass users who can sometimes use regular transit and has freed up service for other Para Transpo customers.

This year Para Transpo plans to run a small pilot project which will use taxis to accommodate some medical trips which would otherwise be refused service.

This report recommends a new eligibility criteria and registration process which will ensure that a reliable service will be provided over the long term to those who have the greatest functional need for accessible transit.

In June of 1999 a report was submitted to the Transit Services Committee that pointed out the need to re-evaluate the current Para Transpo regular booking process. Para Transpo customers can now reserve an unlimited number of regular bookings, 7 days a week, for any trip purpose. This has the effect of limiting the level of service that is available for customers who want to book transportation that does not occur regularly each week. Detailed discussions have been held with the Accessible Transit Advisory Committee on this item and at their May 23 meeting, they indicated that they would not recommend that the number of regular bookings be regulated or that a trip purpose priority system be implemented on Para Transpo at this time. A report on regular bookings and trip priorities will be submitted to the Transit Services Committee in the fall of this year.

## CONCLUSION

It is expected that, with the implementation of the proposed new eligibility criteria and registration process, only those who have the greatest functional need for Para Transpo's door-to-door service will become eligible for service. This will free up some service for Para Transpo customers who have no other transportation alternatives. It is also expected that the consultant's report on the transportation needs of persons with disabilities will provide valuable information that can be used to provide disabled persons in Ottawa-Carleton with the most appropriate and cost-effective means of transportation.

*Approved by  
Gordon Diamond*



**Annex A****WHEEL-TRANS ELIGIBILITY STATEMENT**

An individual's need for accessible transit is based upon an individual's level of physical functional mobility in the home, within the area immediately surrounding the home, and in the community at large, as well a permanency of disability. Eligibility is not based on particular disabilities.

**Note:** Eligibility is based on physical functional mobility not: age, income, availability of others to drive or cognitive disabilities.

Wheel-Trans staff, in conjunction with the Advisory Committee on Accessible Transportation, has revised the eligibility guidelines with a view to providing a reliable service over the long term to those who have the greatest functional need for accessible transit. As a result of these changes there is a requirement for all existing Wheel-Trans customers, as well as any new customers, to attend an in-person interview in order to determine eligibility.

Interviews take place at locations that are fully accessible including the interview area and facilities (please see list below). There are signs directing applicants to the Wheel-Trans Application Interviews at each location. On-site interviews will be conducted at locations where there are 10 or more customers wishing to apply for the service. Arrangements for interviews can be made by calling 393-4111 Monday-Friday, 8:00 p.m. to 4:00 p.m.

DS-Lea and Associates were awarded the contract to conduct the initial in-person interview and they act on behalf of Wheel-Trans. All interviewers employed by DS-Lea have a minimum of 100 hours interviewing experience, particularly in assessing one's need for a service. Prior to the commencement of the interviews, all interviewers attended a one-day training session conducted by members of the Advisory Committee on Accessible Transportation (ACAT) and Commission Staff. This training consisted of providing guidelines and training in the completion of the questionnaire form, eligibility guidelines and sensitivity issues.

The in-person interview takes approximately 15 minutes and the questions assess an individual's physical functional need for accessible transit. The interviewer does not advise the applicant at the interview if they have been approved for Wheel-Trans. Customers will receive notification by mail of the results of the interviews.

**APPROVED CUSTOMERS**

Approved customers will receive a letter that they are required to pay a one-time only registration fee of \$25.00 and that they have 30 days to send the registration fee to Wheel-Trans. Upon receipt of the registration fee, the customer will be sent their new registration card.

**INELIGIBLE CUSTOMERS**

Ineligible customers will receive a letter advising them that they may appeal this decision by submitting documentation, which supports their need for accessible transit. The supporting documentation does not need to be from a doctor and may be submitted by the applicant, an occupational therapist, a physiotherapist, or the person who can best describe the person's need for accessible transit. This information will be reviewed and if required, the customer will be asked to attend a review panel interview. If denied service, the customer will be notified that no further appeals will be considered.

North York – North York Central Library	5120 Yonge St. (Sheppard)
Etobicoke – Richview Library	1806 Islington (Eglinton)
Scarborough – Morningside	255 Morningside (Lawrence/Kingston Road)
Downtown – Metro Hall	55 John Street