Older Driver Expert Summit:
Meeting NHTSA Highway Safety Program Guideline #13

Theoretical Underpinnings

Inputs: Resources & Talent in the Silos
- Websites: Clearinghouse/AOTA
- Deliverables of Gaps & Pathways
- Physicians training in Medscape
- Education module for OT
- AGS Guide for Healthcare Professionals about Older drivers
- Law enforcement work in TRENDS as model
- Iowa DMV as model
- Public health focus on prevention
- CDC driver safety connection with falls
- FL System as a model
- Maryland’s Medical Review Board as model

Pathway Activities
- Investigate the missing links between services.
- Link state licensing agencies with generalist OTs for IADL evaluations (demonstration project).
- Link OT and DRS with Area Agencies on Aging and/or mobility managers (demonstration project).
- Link law enforcement with DRS (TRENDS – duplicate)
- Insurance companies with DRS and OT (evaluate utilization and outcomes)
- Organizing information in one “place” for ease of use for consumers (evaluate utilization).
- Clarify CMS funding for evaluation and rehabilitation.
- Evaluate system of transportation options in FL for consumers.

Outcomes
- Education (easy & accessible) for all stakeholders.
- Medical Advisory Boards (MAB) established and valued.
- MAB appropriately determine risk for medically-at-risk driver.
- Medically-at-risk driver offered appropriate services.
- Drivers and families have ownership & empowerment of the decisions.
- Availability of clear lines of funding of evaluations & support of alternative options.

Impact
- A safety network supporting the medically-at-risk older driver to remain safely mobile and engaged.
Occupational Therapy - Performance Appraisal for Driving (OT-PAD)

Anne E. Dickerson, PhD, OTR/L, SCDCM, FAOTA and Michel Bédard, PhD

Purpose: Driving is a complex instrumental activity of daily living (IADL). Consequently, using clinical reasoning based on evaluation results, knowledge of the client, and observation of clients performing other complex tasks, occupational therapists can make recommendations about the activity of driving. The OTPAD¹ has been designed as a clinical tool to assist therapists in making the link between their knowledge and the activity of driving as well and considerations for supports or requirements for community mobility options.

The person factors that are most likely to affect driving include: Physical/sensory, Cognitive, Emotional regulation, and Insight. Questions are separated into three sections, based on Michon’s three levels of Driving Behaviors².

When related to driving, these are defined as:

- **Strategic level**: Decision-making process, affecting all levels of driving
  - Determining trip goals and mode of transport (e.g., bike, drive, walk).
  - Navigating how to get there as well as being able to modify or change “plans” both in anticipation of trip and while on the road.

- **Tactical level**: Decisions/maneuvers made during driving maneuvers
  - Slowing down due to weather
  - Knowing if it safe to make a left turn
  - Deciding whether to pass a slower vehicle.

- **Operational level**: Human-machine interaction used to control the vehicle
  - Steering, pushing brake pedal, using turn signal.
  - Having the physical skills to carry out the tactical maneuvers.
  - Possessing the overlearned skills developed through driving experience


### Examples of IADL applications for each of the three levels.

<table>
<thead>
<tr>
<th>Strategic: <em>Does the client have the cognitive ability to make decisions at the strategic level?</em></th>
<th>Client Notes:</th>
</tr>
</thead>
<tbody>
<tr>
<td>- Does the client know whether he or she has the information to make an appropriate decision? Does the client initiate seeking additional or clarifying information?</td>
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<td>- If the client were to make a meal, would he or she be able to plan it correctly (with similar competence to prior to his or her medical condition)?</td>
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<td>- Can the client recognize, organize, reorder from pharmacy, and remember to take medication accurately and safely?</td>
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<td>- Can the client plan a meeting with a friend or family member or make an appointment and appropriately follow through without instructions from others?</td>
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<td>- Is the client able to calm down and perform tasks after being surprised, flustered, or annoyed by any incidents or other people?</td>
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<td>- Does the client plan how to manage his or her physical mobility within the immediate environment without significant assistance (i.e., how to plan to get his or her wheelchair in and out of a vehicle as well as in and out of the home)?</td>
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<thead>
<tr>
<th>Tactical: <em>Does the client have the performance skills to perform actions at this level?</em></th>
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<tr>
<td>- Does the client immediately slow down when there is a wet floor or pavement?</td>
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<td>- Does the client acknowledge others passing by in the hallway or on the sidewalk to say hello in recognition?</td>
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<td>- Does the client adjust or accommodate immediately and appropriately when problems occur, such as being disconnected on a phone call, when coffee is spilled, a pet jumps up and down, a family member doesn’t show up, a household item breaks, or food burns on the stove?</td>
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<td>- Is the client able to multitask (i.e., one task being automatic), like walk and talk, read and drink, wash dishes and talk on the phone, tell a story and exercise, give instructions and make coffee?</td>
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<th>Operational: <em>Does the client have the performance skills to perform actions at this level?</em></th>
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<td>- Does the client perform normal daily tasks efficiently and automatically without cues (e.g., brushing teeth, eating, dressing)?</td>
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<td>- Does the client have difficulty manipulating tools like cutlery?</td>
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<td>- Does the client bump into doorways or walls?</td>
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<td>- If the client loses balance, is his or her recovery effective?</td>
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<td>- How does the client react to environmental changes?</td>
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<tr>
<td>- How fast does the client recognize change in the environment? For example:</td>
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<tr>
<td>o Does the client immediately see when someone enters the room?</td>
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<td>o Does the client recognize sounds and the sources of the sound?</td>
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The OTPAD facilitates the link between daily tasks and driving. Using clinical reasoning based on evaluation results, knowledge of the client, and clinical observations, indicate the degree of impairment for each person factor under each level of driving behavior.

<table>
<thead>
<tr>
<th>Levels</th>
<th>Descriptors of how to consider each factor under each level: physical/sensory, cognitive, emotional regulation, and insight.</th>
<th>Degree of Impairment</th>
</tr>
</thead>
<tbody>
<tr>
<td>Strategic: Does the client have the cognitive ability to make decisions?</td>
<td></td>
<td>None</td>
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<tr>
<td>Physical/sensory – Aware of physical limitations and is able to plan for successful compensation (e.g., if in a wheelchair, demonstrates ability to plan time and/or assistance for transfer).</td>
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<td>Cognitive – Demonstrates ability to plan in advance using appropriate decisions to meet the goals of the task; self-regulates with insight into decisions; organizes steps to complete task.</td>
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<td>Emotional regulation – Can plan with appreciation of the emotional state (e.g., Does not drive if experiencing excessive, anxiety, depression, or anger).</td>
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<td>Insight – Has accurate awareness of the skills and abilities he or she possess to meet the demands of the task (e.g., to clean the windows, skills/abilities to use a ladder safety? Can make modified decisions based on driving experience and/or training.)</td>
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<tr>
<td>Tactical: Does the client have performance skills to perform actions at this level?</td>
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<tr>
<td>Physical/sensory – Is aware of his or her physical limitation and adjusts as required (e.g., if floors are wet, walks more slowly).</td>
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<tr>
<td>Cognitive – Can evaluate a complex, dynamic context and adjust or accommodate through appropriate actions.</td>
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<tr>
<td>Emotional regulation – Can recognize and manage emotions that arise in challenging situations.</td>
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<tr>
<td>Insight – Can accurately gauge the risk and skills/abilities needed to meet the demands of a task requiring immediate decisions.</td>
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<td>Operational: Does the client have performance skills to perform actions at this level?</td>
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<tr>
<td>Physical/sensory – Meets the minimum requirements (e.g., vision) or is able to compensate for limitation (e.g., with training, will be able to use hand controls to compensate a lower extremity amputation)</td>
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<tr>
<td>Cognitive – Awareness and flexibility to use the appropriate actions to achieve desired results.</td>
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<tr>
<td>Emotional regulation – Emotional state does not negatively affect performance of automatic tasks.</td>
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<tr>
<td>Insight – Not applicable.</td>
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</table>
How to know if your client or someone you care about with a medical condition is safe to drive?

Presented by Heather Shields
Occupational Therapist
Certified Driving Rehab Specialist
Spinner Knob
Steering Wheel Extension
Hand Control
Tri pin spinner knob
Left Foot Accelerator
A unique approach to driving rehabilitation

My service is the only one in the state of Maine that goes right to the client’s home. One of very few alike in the US.
What is *Driving Rehabilitation*?

- Typically conducted by occupational therapists, driving educators, physical therapists, recreational therapists.
- The goal of driver rehabilitation is to aid individuals with disabilities or age-related impairments and maintain independent driving and transportation. This maybe done through the use of specialized mobility equipment and training.
Objectives

• Educate healthcare professionals about the Maine state laws regarding driving with medical conditions.
• Educate healthcare professionals about driving rehabilitation resources throughout Maine.
• Key areas to focus on when assessing a client.
• Transportation alternatives in Maine.
Elderly (92 year old) man causes scary scene in parking lot...
Maine State Laws

The rules establish a reporting system which requires persons to submit medical information to the Secretary of State.

Persons found incompetent to operate a motor vehicle in accordance with procedures outlined in these rules may have their driving privileges suspended, revoked or restricted.
Medical Requirements
The Secretary of State shall determine the physical, emotional and mental competence of a person to operate a motor vehicle with the advice of the Medical Advisory Board.

The Medical Advisory Board is a professional unit composed of physicians and motor vehicle staff to advise us on medical criteria and vision standards for licensing drivers. The Medical Advisory Board consists of at least seven members who have expertise in matters concerning health or medicine. We work with the Medical Advisory Board to establish and update driver licensing standards.

Rules governing medical conditions and operation of motor vehicles may be obtained online or by sending a written request to:
Bureau of Motor Vehicles Driver License Services Division 29 State House Station Augusta, ME 04333-0029 Tel: (207) 624-9000 ext. 52124

Please include your name, date of birth, current mailing address and specify the type of information you are requesting.

Medical Conditions
For more information click on the condition below:
Cardiovascular Disorders
Diabetes and other Endocrinopathies
Head Injury
Hearing Loss/Vertigo
Neurological & Related Musculoskeletal Conditions
Psychiatric Disorders
Pulmonary Disorders
Stroke
Substance Abuse
Visual Disorders
Medical Forms

- Cancellation of License for Physical, Mental or Emotional Reasons
- Eye Form
- Medical Evaluation Form (CR-24)
How We Obtain Medical Information

We obtain medical information through:
Permits, licenses, renewal applications and accident reports;
Written reports from family, physicians, law enforcement personnel and other government agencies, and;
Signed statements from citizens.

If you have received a request for a medical review, it means we received information regarding your ability to safely operate a motor vehicle.

Law Enforcement Reporting

We receive information from law enforcement regarding possible unsafe drivers. If a driver is stopped by law enforcement, the officer may report a driver who is thought to have a medical condition that could affect their ability to drive safely. This can be reported even if the officer did not issue a ticket to the driver. This may also appear on an accident report.

Physician Reporting

Physicians who care for patients with physical, mental or emotional impairments which may affect their driving safety, whether defined by published guidelines or not, are responsible for making available to their patients without reservation their recommendations and appropriate information related to driving safety and responsibilities.

The information must be in writing and must include the name, address and date of birth of the patient. The medical professional submitting the report in good faith is immune from civil or criminal liability for making the report.

Concerned Citizen Reporting

A person with direct knowledge of a driver's specific conduct or specific events indicating the driver may have a disqualifying medical condition may report this to us by writing a letter including the name, address and date of birth of the driver. Once we receive information, our only contact will be with the driver. We will not notify the reporting person of any outcome. Any citizen in the State who, in good faith, submits a report of a driver's impairment is immune from civil or criminal liability for making the report.

Written and Road Test

If you are required to complete a written or road test, an appointment will be scheduled for you at an examination location closest to your home.
Maine vision requirements

• FOR INDIVIDUALS RENEWING A DRIVER’S LICENSE

  • A vision screening is required for individuals renewing their license at the first license renewal after attaining age 40 and at every 2nd renewal after that.

  • A vision screening is required at every license renewal after attaining age 62. It is not required that you visit an eye doctor.
Certificate of Examination

For the Reporting Physician:
1. This report is requested because the issue has been raised as to the possibility that the applicant may have a mental/physical condition which would affect his/her ability to drive a motor vehicle safely. Your report will be advisory and used to assist in determining eligibility for a driver's license. If you have any questions, please call the Medical Review Coordinator's office.

2. A physician acting in good faith is immune from any damages claimed as a result of the filing of a certificate of examination pursuant to 29-A MRSA Section 1288 (6).

Functional Ability Profile

Please complete the profile level for the listed conditions and provide information for any other conditions not listed below that may affect the driver's ability to drive a motor vehicle safely.

Diagnosis

Profile Level
This section must be completed.
Check only one box per diagnosis.

1. 2. 3. 4.

Date of last examination __________ [must be within past year]
For stroke or loss of consciousness give date of most recent episode __________
Current prescribed medication(s): __________

☐ No medication prescribed

Reliability in taking medication

Good ☐ Fair ☐ Poor ☐ Unknown ☐

Has this patient demonstrated any side effects from current medication(s) which would interfere with safe operation of a motor vehicle?

________________________________________

M.D. or P.A.
02/12/2004
Rev. 03-11 Form

A copy of the rules can be viewed at www.mvdot.maine.gov/license/medical or a Functional Ability Profile booklet can be obtained by calling (207) 624-9000 extension 52124.
PHYSICIAN'S COMMENTS

(Important - please describe physical and/or cognitive deficits.)

_____________________________________________________________________
_____________________________________________________________________
_____________________________________________________________________
_____________________________________________________________________

AUTHORIZATION FOR RELEASE OF MEDICAL INFORMATION

I hereby authorize the release of my medical history to the Secretary of State, Bureau of Motor Vehicles and understand the information may be shared with any qualified medical professional submitting information pertaining to the disclosed medical history for the purpose of determining my eligibility for a driver's license by:

Dr. __________________________  or  Hospital __________________________

Signature of Patient: __________________________  Date: __________________________

(Please forward this form directly to your physician for completion)

Patient Telephone number: __________________________

Being duly licensed to practice in the state of __________________________ I hereby certify that I have examined this applicant.

(Signature) __________________________  (Specialty) __________________________

(Physician's Name Printed or Typed) __________________________  (Address) __________________________

(Office Phone Number) __________________________  (Date) __________________________

Reply to: Medical Review Coordinator
Bureau of Motor Vehicles
29 State House Station
Augusta, Maine 04333-0029
Telephone: (207) 624-9000, ext 52124
Fax: (207) 624-9519
Driving Rehabilitation in Maine
Ketra Crosson, OTR/L, class A DI, DRS  1-800-640-7200 V/TTY or 207-767-2189.  
http://www.alphaonenow.com/adaptive_driving.htm

Susie Kelley, OTR/L, class B DI, 207-662-8377  

Heather Shields, OTR/L class B DI, CDRS  
owner of a mobile driving school  
207-530-0307  
http://www.pathwaysrehabservices.com
Why we are valuable

- Perform a comprehensive driving evaluation including clinical and on-road driving assessment
- Clinical: vision, perception, cognition, motor control, reaction, coordination, visual and cognitive processing
- On-road: 30-60 minutes in the vehicle, may include assessing/teaching adaptive equipment
- We look at the big picture. We collaborate with the client, family, the vendors, the BMV.
Key areas to focus on when assessing a client

• Know your role and how you can educate from your perspective.

• Know the Functional Ability Profiles so that you understand what the law is.

• Document and speak up if you have a concern!

• Call the Medical Division of the BMV if you have questions. Ask to speak with Anne Turgeon or Thea Fickett.
Maine Transportation Alternatives

- Southern Maine Agency on Aging
- Senior Plus
- Aging Excellence
- Maine Senior Guide
- Non medical home care agencies
- ITN Portland
- RTP for medical appointments
- Buses, taxis
Questions

1. In the state of Maine, who’s responsibility is it to report a medical condition?
   A. The doctor.
   B. The therapist.
   C. The individual.
   D. The family member.

2. What roles do we play as healthcare professionals?
   A. We educate the client about how their medical condition affects them.
   B. We educate the client about their options.
   C. We educate ourselves about the laws in regards to driving with a medical condition.
   D. All of the above.

3. Where is the best place to find the Maine state laws in regards to driving with medical conditions?
   A. http://www.maine.gov/sos/bmv/licenses/medical.html
   B. Ask the doctor.
   C. Tell the individual to go to the BMV.
   D. Call a driving school.
Online Evaluation Form

http://www.une.edu/pharmacy/oce/events
Answer Key

1. C The individual
2. D All of the above
3. A
   http://www.maine.gov/sos/bmv/licenses/medical.html
Contact information

Heather Shields, OTR/L, CDRS, class B driving instructor
207-530-0307
www.pathwaysrehabservices.com

Memberships
AOTA
ADED
MEOTA
MEDEA
MEDTSEA