



He Kaupare. He Manaaki.
He Whakaora.
prevention. care. recovery.

Transport for Independence Assessment Services Operational Guidelines

Standard and Specialised Assessments

This is a living document and will be updated as
required

November 2023

Drafted with the support of suppliers and ACC staff

Contents

1	Introduction	5
1.1	Purpose	5
1.2	Services Overview	5
2	Responsibilities	6
2.1	Supplier responsibilities	6
2.2	ACC responsibilities	7
2.3	Client responsibilities	8
3	Referral process	8
3.1	Before ACC refers	8
3.2	Referral Process Map	8
3.2.1	Referral form	8
3.2.2	Referral acceptability	9
4	Standard Assessment Process	9
4.1	Process table	9
4.2	Standard Assessment considerations	10
4.3	Screening Tools	11
4.4	Standard Assessment Payment Codes	14
5	Standard Assessment – Medical Fitness to drive Process	15
5.1	Process table	15
6	Specialised Assessment Process	16
6.1	Process table	16
6.2	Specialised Assessment considerations	16
6.3	Specialised Assessment Payment Codes.....	17
7	Requests for Reassessment or replacement vehicle	19
7.1	Reassessment.....	19
7.2	Replacement vehicle	19
8	Assessment submission and approval.....	19
8.1	Submission	19
8.2	Approval	19
9	Coordination Services	20
9.1	Standard Assessment	20
9.2	Specialised Assessment	20
9.3	Vehicle options	21
9.4	Client contribution towards purchase of a vehicle	22
9.5	Managing client expectations	22
9.6	Handover	23
10	Service Quality	24
10.1	Quality Management Plan	24
10.2	Standards and Guidelines	24
10.3	Assessors	24
10.3.1	Qualifications and Experience.....	24
10.3.2	Provider training	24
10.3.3	Supervision and training.....	25
10.3.4	Peer review	25
10.3.5	Continuing education meetings	25
10.4	Cultural Safety	26
11	Reporting and Monitoring	26
11.1	Supplier reporting to ACC.....	26
11.2	Key Performance Indicator Monitoring.....	26
11.3	TFIA Supplier Report	27
11.4	Service Forms	30
11.5	Managing client non-attendance (Did not attends)	31
12	Appendices	31
12.1	ACC4506 Determine transport needs <i>form summary</i>	31
12.2	ACC7987 Transport for independence Assessment referral <i>form summary</i>	32
12.3	ACC4507 Standard Assessment <i>form summary</i>	34
12.4	ACC4508 Specialised Assessment <i>form summary</i>	35

Transport for Independence Assessment Services Operational Guidelines

12.5	ACC7989 Notice of Change in TFIA Service <i>form summary</i>	37
12.6	ACC6268 TFI assessor completion report <i>form summary</i>	38
12.7	What's covered by the Vehicle Modification Service?	39
12.8	What isn't covered by the Vehicle Modification Service?	40
13	Table of Changes	41

Useful contacts and telephone numbers

Delivering Transport for Independence Assessments service on ACC's behalf is likely to involve you contacting our teams. Here are their contact details.

ACC Provider Helpline	Ph: 0800 222 070	Email: Providerhelp@acc.co.nz
ACC Client/Patient Helpline	Ph: 0800 101 996	
Provider registration	Ph: 04 560 5211 Fax: 04 560 5213	Email: registrations@acc.co.nz Post: ACC, PO Box 30 823, Lower Hutt 5040
ACC eBusiness	Ph: 0800 222 994, option 1	Email: ebusinessinfo@acc.co.nz
Health Procurement	If you have a question about your contract or need to update your details, please contact the ACC Health Procurement team: Email: health.procurement@acc.co.nz Ph: 0800 400 503	
Engagement and Performance managers	Engagement and Performance managers can help you to provide the services outlined in your contract. Contact the Provider Helpline or https://www.acc.co.nz/for-providers/provide-services/provider-relationship-team/#find-an-engagement-and-performance-manager for details of the engagement and performance manager in your region.	
ACC Portfolio	Contact the Provider Helpline for details of the Portfolio Advisor or Manager.	

The ACC website can provide you with a lot of information, especially our “for providers” section. Please visit www.acc.co.nz

How to read this guide

Read these operational guidelines with the:

- [ACC Standard Terms and Conditions](#)
- Transport for Independence Assessments Service Schedule.

The services delivered must reflect the expectations outlined in the Transport for Independence Assessments service schedule (contract). Where there are any inconsistencies between this operational guideline and the contract, the contract will take precedence.

ACC will work collaboratively with suppliers to improve the operation of the service and we will ensure this document is up to date with any service improvements made.

ACC will tell you when a new version is available on the ACC website at www.acc.co.nz.

1 Introduction

1.1 Purpose

The Transport for Independence Assessment (TFIA) service provides specialist assessments that assist ACC to identify the most appropriate and sustainable transport options to:

- restore a client's ability to function independently when using transport in their normal daily activities
- achieve their rehabilitation outcome; and
- coordinate the vehicle modification where this has been agreed by ACC.

The assessment process is intended to provide information and advice about the modifications required, and if a suitable vehicle is not available, identifies appropriate makes and models of vehicles that have the necessary features that will meet the client's injury related needs.

1.2 Services Overview

There are three assessments with increasing complexity. The coordination service is described separately but is a continuation of the standard and specialised assessments.

The supplier can change the type of assessment undertaken if the supplier determines the client meets the eligibility criteria and they are contracted for that type of assessment.

Standard Assessment	A Standard Transport for Independence assessment is for clients who require transport options to be identified because of functional limitations that have arisen from their injury.
Standard Assessment – Medical Fitness to Drive	A medical fitness to drive assessment is for clients who require a clearance to drive because they have been excluded from driving, due to their injury.
Specialist Assessment	<p>A Specialised Transport for Independence assessment is for clients who, as a result of functional limitations that have arisen from their injury,</p> <ul style="list-style-type: none"> • require transport options to be identified and • need transport while seated in a wheelchair either as a passenger or driver of a vehicle, or • are children who are wheelchair users, or • are children or adults who have significant injuries of a progressive nature that are likely to result in significant impairment affecting mobility/function.

Coordination Service	<p>A coordination service is provided to support the client once the assessment report has been accepted and recommendations approved.</p> <p>The supplier will, based on the client's needs, coordinate driver training and the vehicle modification process.</p> <p>The supplier, having recommended suitable cars to be modified, is not responsible for helping the client find the car to be modified. They will not attend a car dealership or car sales yard.</p> <p>If the car is not one of the listed vehicles, the supplier will provide advice to the client on the suitability of the vehicle in question. The supplier will seek advice from a modifier as to the suitability of the vehicle in question, if required.</p> <p>If the vehicle is not suitable no further action is required. If the vehicle is suitable the supplier will inform ACC of the vehicle suitability.</p>
----------------------	---

2 Responsibilities

2.1 Supplier responsibilities

The supplier is responsible:

to...	for...
Client	<ul style="list-style-type: none"> • assigning a suitably qualified and experienced professional • contacting the client promptly • arranging a support person, if required • ensuring the client is well informed by <ul style="list-style-type: none"> ○ explaining the assessment process ○ answering any questions ○ providing any written informational material to support their understanding • maintaining independence and not advocating for the client
ACC	<ul style="list-style-type: none"> • reviewing the referral promptly and, if needed, contacting ACC if there is insufficient information to begin work. Note: Confirmation of acceptance is not required. • assigning a suitably qualified assessor • nominating a person to have contact with ACC, on a case-by-case basis • agreeing planned timeframes • suggesting solutions to achieve the client outcomes • alerting ACC of any needs/issues/risks/vulnerabilities identified while working with the client and their family/whanau. • notifying ACC, on the appropriate form, of <ul style="list-style-type: none"> ○ a change of assessment type ○ service delays

to...	for...
	<ul style="list-style-type: none"> ○ a need for additional hours ○ a need for a purchase order for exceptional need • ensuring the independence of the assessment by not favouring the client's or ACC's views over the other but rather applying clinical judgement of necessity, not want or preference. • ensuring appropriate representation by the provider team in service performance discussions • informing ACC of any issues in the provision of the service • ensuring that all health and safety requirements are met. • ensuring the efficient and effective operation of the service. The supplier is empowered to manage the client's service and to make decisions for the benefit of the client and ACC. With great freedom comes great responsibility. Therefore, the supplier will closely monitor <ul style="list-style-type: none"> ○ the hours delivered to ensure the providers are efficient (well organised and competent) ○ the work undertaken to ensure the providers are effective (successful in producing the intended service)
Other service suppliers	<ul style="list-style-type: none"> • maintaining good collaborative working relationships • providing and receiving information appropriate to the situation and need.

2.2 ACC responsibilities

ACC is responsible:

to...	for...
Clients	<p>ensuring they understand</p> <ul style="list-style-type: none"> • the assessment process and why ACC needs the assessment to support decision making • the timeliness of the process and any delays that may occur • providing information about <ul style="list-style-type: none"> ○ entitlements ○ rights and obligations
Suppliers	<ul style="list-style-type: none"> • ensuring high quality referrals are sent • necessary and appropriate information is included with referrals • promptly responding to purchase order requests • making prompt decisions • keeping the supplier informed on the progress of any approvals • promptly monitoring their performance and addressing any issues as per the Standard Terms and Conditions

Other service suppliers	<ul style="list-style-type: none"> keeping them informed of any relevant information
-------------------------	---

2.3 Client responsibilities

The client is responsible for:

- attending appointments or rescheduling them with reasonable notice when they are unable to attend
- participating in the assessment and providing truthful and accurate information
- discussing any problems that may impact on their participation with their recovery team member and supplier.

3 Referral process

The following process outlines ACC and the supplier's actions to refer the client.

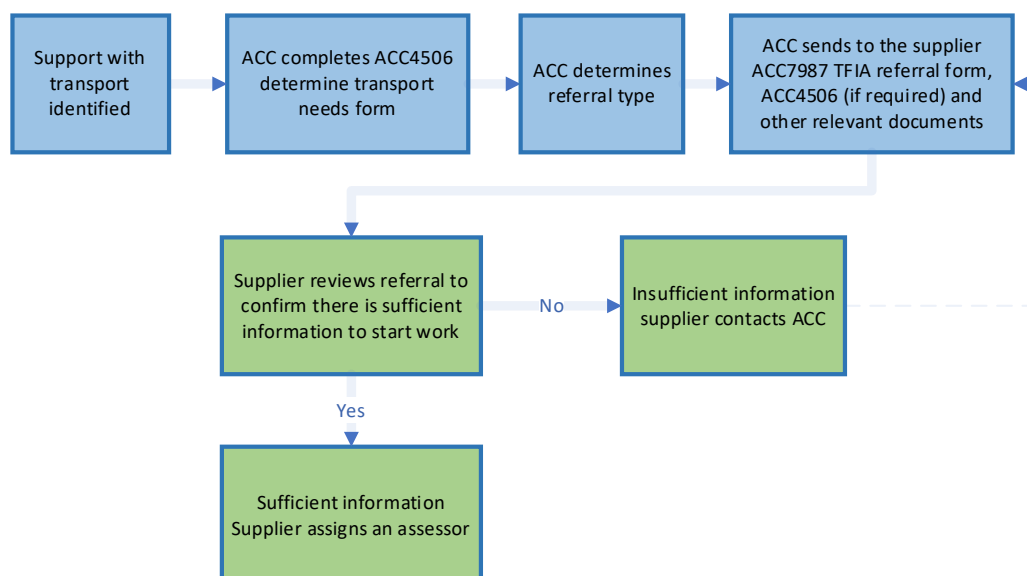
3.1 Before ACC refers

ACC uses the 'determining transport needs' process to work with the client and their family or whānau to identify what assistance may be available or required to achieve a suitable transport outcome.

ACC completes the ACC4506 Determine Transport Needs form (ACC4506) with the client. Based on the information gathered, ACC determines whether to refer for a standard or specialised assessment. The form also provides the assessor with valuable information to assist in their assessment.

The ACC4506 is not required for a 'medical fitness to drive' assessment.

3.2 Referral Process Map



3.2.1 Referral form

ACC refers the client to the supplier for an assessment using the ACC7987 Transport for Assessment Referral form. The referral includes:

- Details about the client and their injury
- The client's transport needs and options
- any previous assessment report(s) relevant to the current circumstances.
- the ACC4506 Determine Transport Needs form for full standard and specialised assessments.

3.2.2 Referral acceptability

Within 24 hours of receiving the referral the supplier reviews the referral and considers:

Capacity	<p>The type of assessment required and their capacity to respond to the referral.</p> <p>If no capacity, the supplier notifies ACC of their decline within 24 hours of receipt of the referral to allow ACC to reassign the referral to another supplier or negotiate with the supplier.</p>
Referral completeness	<ul style="list-style-type: none"> - Client contact details - Fully completed ACC4506 (where appropriate) - Prior and other social assessments - Relevant clinical notes and reports <p>Where the information is incomplete or inadequate the supplier contacts ACC requesting the needed information.</p>

If ACC does not respond in a timely way, use the agreed escalation process.

When the referral has all the information required the supplier assigns an assessor.

4 Standard Assessment Process

4.1 Process table

The standard assessment process is:	
1	<p>The assessor</p> <ul style="list-style-type: none"> - meets (face-to-face) with the client and family, whānau (support person/s) at their home (or another suitable location) as soon as possible after the initial contact is made with the client. - provides a full explanation of the assessment process to the client (and any other person involved in the assessment process) prior to the assessment beginning. - determines client's injury related need/s and outcomes to be achieved. - assesses the client using the appropriate screening tools - considers environmental factors like family, home/work, equipment to be transported - identifies options to meet the client's transport needs
2	<p>The assessor works with the modifier to develop the vehicle modification specification, and to obtain a quote of estimate.</p>

3	The assessor completes the report with recommendations and as required, vehicle options and/or a quote for modifications
4	ACC considers the report and the recommendations and discusses the report with client, including client's financial contribution, and makes a decision.
5	ACC sends a decision letter to client. Assessor is advised by ACC if any follow up is required.
See the Coordination Section	

4.2 Standard Assessment considerations

The assessor will communicate any issues or potential delays to the client and ACC as soon as they are apparent throughout the assessment process.

During the assessment the assessor considers, subject to the client circumstance, the following topics:

Health, function and fitness	the client's health status, functional ability and medical fitness to drive
Driver or passenger	whether the client will be a driver or passenger in the vehicle and their seated position in the vehicle
Transporting equipment	other people and/or essential items of equipment (e.g. wheelchair, consumables, commodes, ramps etc) that need to be transported and the frequency of transporting those people and/or equipment items
Off-road Assessment	what assessment/screening tools are required are appropriate based on the client's injury and presentation.
On-road Assessment	if the client requires on road assessment(s) and whether a driving instructor is required. If a driving instructor is required, the assessor is responsible for making these arrangements (including payment) and being specific about the location and conditions (e.g. road type, time of day, weather or traffic conditions) for this assessment.
Transportation of wheelchairs and equipment	for clients with wheelchairs / equipment: <ul style="list-style-type: none"> - Wheelchair/equipment size and footprint - Wheelchair/equipment type tie down points / restraint options - Seated height including clearance for vehicle entry, or above head when travelling - Increases to overall weight of the vehicle with the addition of the wheelchair - Vehicle entry or restraint system
Social	what options will support the client to achieve their agreed social needs like sports, hobbies, clubs, family relationships, etc What, needs in regard to vehicle and modification, are injury-related vs. non injury related.
Vocational considerations	the employer's responsibility of the basic tools for the person to do their job.

	<p>ACC may only consider vehicle modifications to a work vehicle as opposed to the vehicle purchase.</p> <p>This may require assessment of non-standard vehicles such as forklifts, Class 2-5 trucks. The supplier may need to engage commercial trainers and/or arrange rental of commercial vehicles.</p>
Environmental considerations	<p>where the vehicle will be parked or used and what, if any, modifications may need to be made to the environment to provide access (e.g. modification to a carport and/or what impact the environment will have on the choice of vehicle).</p>
Children	<p>transport options the following:</p> <ul style="list-style-type: none"> - Future growth and changes to wheelchair sizes. - Current and future equipment needs - Family and/or social changes (e.g. family size changes, access to participate in activities) - Access to education. - Availability of suitable drivers/caregivers - Access to mobility taxi services <p>For children requiring specialised transportation options they should be assessed using a specialised assessment.</p>
Clients with progressive or degenerative conditions	<p>change the type of assessment to a specialist assessment when a person has a progressive / degenerative condition that will have a significant impact on their mobility needs (e.g. is likely to require the use of a wheelchair for their future mobility needs).</p> <p>If the supplier can complete the specialist assessment, then an ACC7989 Notice of Change form is sent.</p> <p>If the supplier can't complete the specialised assessment, then they will contact ACC so a referral can be sent to a supplier who does specialist assessment.</p>
Future proofing	<p>if there are any likely changes in the client's circumstances that may affect the vehicle's modification requirements, e.g., a change in equipment or family situation, etc.</p> <p>By looking forward and anticipating (within reason) to ensure the modified vehicle remains suitable for the client's requirements over the expected lifetime of the vehicle.</p>

4.3 Screening Tools

These are some examples of the cognitive & visual screening tools that are available for use in any of the assessments:

Name	How it is used
<p>SIMARD-MD</p> <p>Screen for the Identification of the Cognitively Impaired Medically At-Risk Driver</p>	<p>The screening test consists of 4 separate tasks.</p> <p>An immediate and then delayed recall of ten words; a number conversion task; and a verbal fluency (semantic memory) task</p>

Name	How it is used
A Modification of the DemTect	in which the client has one minute to name objects that can be bought in a supermarket.
Comprehensive Trail Making Test	<p>Both parts of the Trail Making Test consist of 25 circles distributed over a sheet of paper.</p> <p>In Part A, the circles are numbered 1 – 25, and the client should draw lines to connect the numbers in ascending order.</p> <p>In Part B, the circles include both numbers (1 – 13) and letters (A – L); as in Part A, the client draws lines to connect the circles in an ascending pattern, but with the added task of alternating between the numbers and letters (i.e., 1-A-2-B-3-C, etc).</p> <p>Results for both TMT A and B are reported as the number of seconds required to complete the task; therefore, higher scores reveal greater impairment.</p>
Drive Safe / Drive Aware	<p>DSDA is a screening tool that measures a driver's awareness of driving environments and their own abilities related to driving.</p> <p>Interactive tablet (iPad) application.</p> <p>When compared against 22 commonly used tests, only Drive Safe and Drive Aware had sufficient sensitivity and specificity to be used as stand-alone tests to predict driving capacity Conclusion Successful identification of 'at risk' drivers is a community safety issue that DriveSafe and DriveAware can address. The test has the advantage of being administered in an office setting, with sufficient sensitivity and specificity to predict driving safety.</p>
<p>BIDSAM</p> <p>For those with Brain Injury, we sometimes use the Brain Injury Driving Self-Awareness Measure</p> <p>Monash University</p>	<p>The BIDSAM is a 28-item measure designed to assess awareness of on-road driving performance in adults undergoing a standardised on-road driving assessment following brain injury. It comprises two parallel forms: a self scale which is completed by the driver being assessed and a clinician scale which is completed by a qualified driving assessor responsible for conducting the assessment.</p>
<p>MoCA-B</p> <p>Montreal Cognitive Assessment Basic</p>	<p>The Montreal Cognitive Assessment (MoCA) was designed as a rapid screening instrument for mild cognitive dysfunction. It assesses different cognitive domains: attention and concentration, executive functions, memory, language, visuo-constructional skills, conceptual thinking, calculations, and orientation. Time to administer the MoCA is approximately 10</p>

Name	How it is used										
	minutes. The total possible score is 30 points; a score of 26 or above is considered normal.										
Bell's Test	The Bells Test, a cancellation task, permits a quantitative and qualitative evaluation of visual neglect. The construction of the test allows for rapid visualization of the spatial distribution of the omitted targets and their quantification. The examiner can also obtain a qualitative picture through an approximation of the visual scanning pattern used by the subject: this provides valuable information on "how" the task is performed. In summary, the Bells Test is a more dynamic, and thus, more sensitive clinical examination for visual neglect.										
Motor-Free Visual Perception Test	<p>The Motor-Free Visual Perception Test (MVPT) is a widely used, standardized test of visual perception. Unlike other typical visual perception measures, this measure is meant to assess visual perception independent of motor ability.</p> <table> <tr> <td>Visual Discrimination</td><td>The ability to discriminate dominant features in different objects; for example, the ability to discriminate position, shapes, forms, colors and letter-like positions.</td></tr> <tr> <td>Visual Figure-Ground</td><td>The ability to distinguish an object from its background.</td></tr> <tr> <td>Visual Memory</td><td>The ability to recall dominant features of one stimulus item or to remember the sequence of several items.</td></tr> <tr> <td>Visual Closure</td><td>The ability to identify incomplete figures when only fragments are presented.</td></tr> <tr> <td>Visual Spatial</td><td>The ability to orient one's body in space and to perceive the positions of objects in relation to oneself and to objects.</td></tr> </table>	Visual Discrimination	The ability to discriminate dominant features in different objects; for example, the ability to discriminate position, shapes, forms, colors and letter-like positions.	Visual Figure-Ground	The ability to distinguish an object from its background.	Visual Memory	The ability to recall dominant features of one stimulus item or to remember the sequence of several items.	Visual Closure	The ability to identify incomplete figures when only fragments are presented.	Visual Spatial	The ability to orient one's body in space and to perceive the positions of objects in relation to oneself and to objects.
Visual Discrimination	The ability to discriminate dominant features in different objects; for example, the ability to discriminate position, shapes, forms, colors and letter-like positions.										
Visual Figure-Ground	The ability to distinguish an object from its background.										
Visual Memory	The ability to recall dominant features of one stimulus item or to remember the sequence of several items.										
Visual Closure	The ability to identify incomplete figures when only fragments are presented.										
Visual Spatial	The ability to orient one's body in space and to perceive the positions of objects in relation to oneself and to objects.										
biVABA Brain Injury Visual Assessment Battery for Adults	Visual Scanning Course <p>The biVABA contains 4 subtests that measure visual function in persons with low vision from macular degeneration, diabetic retinopathy, glaucoma, and other conditions, enabling the test to be used for both populations.</p>										
Field of View test	A visual field test measures how far the eye sees in any direction without moving and how sensitive the vision is in different parts of the visual field. This helps doctors to find certain types of injuries and disease, like glaucoma.										
Snellen Chart	<p>Used to assess visual acuity.</p> <p>The standard of visual acuity required for a Class 1 or 6 driver licence is 6/12 using both eyes together, with or without correcting lenses.</p>										

The assessor completes and submits ACC4507 Transport for independence – standard assessment report as soon as possible after the assessment is complete. The report will include recommendations and as required, vehicle options and/or a quote for modifications.

4.4 Standard Assessment Payment Codes

Service item codes for a standard assessment		
TFIA05 Standard Assessment and Coordination	15 hours	<p>These hours are available for use without a purchase order.</p> <p>The supplier can invoice ACC for the time spent:</p> <ul style="list-style-type: none"> - conducting the assessment with the client, - reviewing the assessment results and - writing the report for ACC - working with the modifier to develop the quote - advising the client and ACC about the suitability of vehicles. <p>The hourly rate includes overhead costs, which covers a reasonable allowance for time spent</p> <ul style="list-style-type: none"> - writing basic clinical notes required under the professional standards, - liaising (with the client and ACC) - administration. <p>Where there is an unusually high level of complexity that requires more hours, these may be invoiced for. A supplier's service is expected to be efficient and effective.</p>
	5 hours	<p>Additional hours are available if there is a high level of complexity, to a maximum of 20 hours (15 hours + 5 hours). The assessor notifies ACC of this need via email on the ACC7989 Notice of Change form.</p> <p>Complexity is when (and/or):</p> <ul style="list-style-type: none"> - the client's psycho-social factors require more time to ensure an accurate and comprehensive assessment - ACC requires additional information that was not initially requested - there has been changing circumstances that requires more time than expected.
	More	<p>In exceptional circumstances the supplier can request a purchase order for additional hours over the 20 hours (available without a purchase order). This is done by emailing ACC a ACC7989 Notice of Change form.</p> <p>The rationale would have to be compelling as to why additional hours were being requested rather than the assessment being changed to a specialised assessment.</p>
	Note:	<p>Invoicing ACC for the driving instructor needed for the on-road assessment is not done by hours but by an apportionment of cost.</p>

		For example, if the driving instructor invoices the supplier for 2 hours @ \$80 per hour, totalling \$160. The TFIA supplier will invoice ACC using the TFIA28 service code and the appropriate amount of time to equate to what was paid to the driving instructor.
TFIA15 Supervision	5 hours max.	When an assessor is still in training, to ensure service quality and client safety, a qualified assessor can provide supervision. This can be done by accompanying the assessor in person or attending virtually using digital technology. Supervision is for the benefit of the client, as while it may be a teaching moment, is not being done for that reason.
TFIADNA1 Did not attend	3 hours max.	When a client did not attend a scheduled appointment, without giving at least 24 hours prior notification, a non-attendance fee can be invoiced for. The assessor will document the non-attendance in the client's notes. If the client's non-attendance becomes a barrier to the completion of the assessment the assessor should contact ACC. This code is not available to a supervisor where they are supervising an assessor in training (TFIA15). One occurrence only, of up to 3 hours per referral. Suppliers may not use the hours available for a client's assessment as reimbursement for any time a client did not attend a scheduled appointment

5 Standard Assessment – Medical Fitness to drive Process

5.1 Process table

The standard fitness to drive assessment process is:	
1	<p>The assessor</p> <ul style="list-style-type: none"> - meets (face-to-face) with the client and their family, whānau (support person) at their home (or other suitable location) as soon as possible after the initial contact is made with the client. - provides a full explanation of the assessment process to the client (and any other person involved in the assessment process) prior to the assessment beginning. - confirms the client's injury related need/s and outcomes to be achieved (fitness to drive) - considers environmental factors e.g. family, home/work, equipment to be transported is appropriate - changes to a standard assessment if circumstances require it. - identifies options to meet the client's transport needs if required (such as remedial driving tuition).
2	Assessor completes and submits the report with recommendations as to the client's

	fitness to drive.
3	ACC discusses report with client and discusses options if required.
4	Where ACC's decision is complex a letter maybe issued to client informing them of the decision.

See the Assessment Considerations section 4.2 for the assessment process. The same payment codes apply.

6 Specialised Assessment Process

6.1 Process table

The specialised assessment process is:	
1	<p>The assessor</p> <ul style="list-style-type: none"> - meets (face-to-face) with the client and their family, whānau (support person/s) at their home or other suitable location, as soon as possible after the initial contact is made with the client. - provides a full explanation of the assessment process to the client (and any other person involved in the assessment process) prior to the assessment beginning - confirms the client's injury related need/s and outcomes to be achieved - conducts the assessment using the appropriate screening tools - considers any environmental factors e.g. family, home/work, equipment to be transported - identifies options to meet the clients' transport related needs
2	Where ACC has confirmed that a modified vehicle is appropriate the assessor contacts ACC to organise travel arrangements for client to visit the vehicle modifier's premises (if needed).
3	The assessor attends a face-to-face meeting with the client at the vehicle modifier's premises (if needed).
4	The assessor works with vehicle modifier to complete a quote for necessary vehicle modifications
5	Assessor completes and sends the ACC4508 Transport for Independence – Specialised Assessment report to ACC. <i>Peer review of the report is required if assessor is in training.</i>
6	ACC discusses the report with client and seeks approval from delegation holder
7	ACC issues decision letter to client and provides copies to assessor and vehicle modifier

See the [Standard Assessment considerations](#) for the assessment process.

6.2 Specialised Assessment considerations

In addition to standard assessment considerations, the assessor will consider:

Transportation of wheelchairs and equipment	<p>For clients with wheelchairs / equipment:</p> <ul style="list-style-type: none"> - Knee height for self-drivers - Head clearance (to ensure client can access the doors and fit in driving position). - Physical capacity and endurance for driving. - Wheelchair restraint systems - Space in proposed vehicle to accommodate people seat and equipment. - Type, size and location of hoist/ramp - Turning space inside vehicle - Remotes, switches and door openers - How will other people drive vehicle when needed - Alternate back/head support - Affordability of new vehicle (insurance, diesel, servicing costs) - Need for wheelchair/seating modifications to allow access into vehicle or to enable self-driving e.g. fold down back cranes, drop down controller - Any issues with safety related to self-driving
Considerations for children	<p>For children requiring transport options consider / address the likelihood that the child will increase in size and the wheelchair will need to accommodate their growth; consideration should be given to future proofing the modifications (e.g. considering an appropriate wheelchair hoist that will meet the child's growth needs).</p>

The assessor will complete and submit the ACC4508 Transport for Independence – Specialised Assessment report as soon as possible after the assessment is complete. The report will include recommendations and as required, vehicle options and/or a quote for modifications.

6.3 Specialised Assessment Payment Codes

Service item codes for a specialised assessment		
TFIA28 Specialised Assessment	15 hours	<p>These hours are available for use without a purchase order.</p> <p>The supplier can invoice ACC for the time spent</p> <ul style="list-style-type: none"> - conducting the assessment with the client - reviewing the assessment results - writing the report for ACC - working with the modifier to develop the quote - advising the client and ACC about the suitability of vehicles. <p>The hourly rate includes overhead costs, which covers a reasonable allowance for time spent</p> <ul style="list-style-type: none"> - writing basic clinical notes required under the professional standards

		<ul style="list-style-type: none"> - liaising (with the client and ACC) - administration. <p>Where there is an unusually high level of complexity that requires more hours, these may be invoiced for. The supplier's service is expected to be efficient and effective.</p>
	22 hours	<p>The additional hours are available if there is a high level of complexity, to a maximum of 37 hours (15 hours + 22 hours). The assessor notifies ACC via email on the ACC7989 Notice of Change form.</p> <p>Complexity is when (and/or)</p> <ul style="list-style-type: none"> - the client's psycho-social factors require more time to ensure an accurate and comprehensive assessment - ACC requires additional information that was not initially requested - there has been changing circumstances that requires more time than expected.
	More	<p>In exceptional circumstances the supplier can request a purchase order for more hours by submitting the ACC7989 Notice of Change form. The rationale would have to be compelling as to why additional hours were being requested.</p>
	Note:	<p>Invoicing ACC for the driving instructor needed for the on-road assessment is not done by hours but by an apportionment of cost.</p> <p>For example, if the driving instructor invoices the supplier for 2 hours @ \$80 per hour, totalling \$160. The TFIA supplier will invoice ACC using TFIA28 and the appropriate amount of time to equate to what was paid to the driving instructor.</p>
TFIA29 Supervision	5 hours max.	<p>When an assessor is still in training, to ensure service quality and client safety, a qualified assessor can provide supervision. This can be done by accompanying the assessor in person or attending virtually using digital technology.</p> <p>Supervision is for the benefit of the client, as while it may be a teaching moment, is not being done for that reason.</p>
TFIADNA2 Did not attend	3 hours max.	<p>When a client did not attend a scheduled appointment, without giving at least 24 hours prior notification, a non-attendance fee can be invoiced for. The assessor will document the non-attendance in the client's notes.</p> <p>If the client's non-attendance becomes a barrier to the completion of the assessment the assessor should contact ACC.</p> <p>This code is not available to a supervisor where they are supervising an assessor in training (TFIA24).</p> <p>One occurrence only, of up to 3 hours per referral.</p> <p>Suppliers may not use the hours available for a client's assessment as reimbursement for any time a client did not attend a scheduled appointment</p>

7 Requests for Reassessment or replacement vehicle

7.1 Reassessment

If ACC requests a reassessment, the assessor will identify any changes in the client's injury related needs, condition or circumstances since the last assessment was undertaken.

7.2 Replacement vehicle

Depending on the client's situation, a full assessment or reassessment may not be required when a client is referred for a replacement vehicle with modifications.

A referral for Coordination of Vehicle Modifications can be made which will include any previous assessment report(s) relevant to the current circumstances.

Note: If the client's vehicle is a drive from wheelchair, a full assessment will be required, because the client may have an alternative chair and each vehicle has different heights.

8 Assessment submission and approval

8.1 Submission

The assessment report should have all the required information to enable ACC to make a decision. It should clearly identify and document the:

- client's injury related needs
- outcomes to be achieved with the provision of vehicle modifications
- vehicle modifications required (if any)
- cost of the modifications developed with an ACC contracted vehicle modifier (quote)
- client's options that are considered not injury related, so ACC can confirm that the client is responsible for these

The supplier will ensure the report is comprehensive and completed to a high standard by peer reviewing:

- all assessments completed by an assessor in training
- a proportion of assessments completed by any fully trained and experienced assessors.

8.2 Approval

ACC will review the completed assessment and supporting documents and will make a decision.

If approved, ACC will send the client a decision letter and a copy of the signed ACC94 Information – Vehicle Purchase / Modification form. A copy will also be sent to the assessor and vehicle

modifier within 10 working days of receiving the assessment report, if all information that is required has been attached.

Note: ACC's timeline is subject to the workload of the team of people processing the assessment report.

ACC will contact the assessor if the recommendation is rejected and/or where further information is required.

9 Coordination Services

The supplier will provide coordination by:

- providing the client with advice on the modification process
- arranging meetings with the client and modifier
- collaborating closely with the modifier to develop the appropriate design solutions
- ensuring the modified vehicle and the client are both safe to drive on New Zealand roads.

Where vehicle modifications have been approved in writing by ACC, the assessor coordinates the remaining steps to the final delivery of a safe vehicle and driver. This includes:

- Supporting the client's efforts to ensure the car to be modified meets the client's needs by providing advice face to face or via phone, email or video conferencing.
- Liaising with the vehicle modifier to ensure the exact requirements of the modification occur as approved by ACC.
- Arranging and ensuring the client has received training from a driving instructor to use the modified vehicle (where applicable).
- Arranging off-road and on-road driving assessments (where applicable).
- Ascertaining client satisfaction with the completed vehicle modification.

9.1 Standard Assessment

Coordination	
1	The client identifies a vehicle for modification. The assessor may provide advice, if required. Note: The client may work with broker to source the vehicle.
2	Assessor is asked to confirm to ACC that the vehicle meets the client's injury related need and is suitable for modification (if required)
3	ACC sends approval to vehicle modifier (if required) and a referral to the assessor to oversee modifications
4	Assessor completes sign off and sends the ACC6268 – Transport Assessment Completion report to ACC.

9.2 Specialised Assessment

Coordination	
--------------	--

1	Modifier advises ACC, the client and assessor when they are beginning the Stage 1 modification.
2	ACC books travel for client to attend a meeting at the modifiers site.
3	Assessor meets with client at modifiers once hoist and floor completed (stage 1). If any further (stage 2) modifications are required to tailor the modifications to the specific client, these are confirmed during this meeting.
4	Any required Stage 2 modifications are completed.
5	The assessor completes a final check once all vehicle modifications are complete. The final check can be done at: <ul style="list-style-type: none"> - the modifier's site or - at the dealership in or near the client's hometown. If the modifications do not meet the quality standard or are not fit for purpose, the assessor will contact ACC to discuss the remedial action required.
6	If required, the assessor arranges for driver training and hands vehicle over to client.
7	The assessor sends the ACC6268 – Transport Assessment Completion report to ACC.

9.3 Vehicle options

Depending on the client's current vehicle situation there may be a range of options to meet their needs. The following scenarios are the most likely.

The client has...	The assessor will...
a vehicle that no longer meets their need, but another vehicle would meet their need without any modifications	<p>identify a range of cost-effective vehicles that will meet the client's needs.</p> <p>A replacement vehicle may be purchased with a financial contribution from the client for the agreed value of their current vehicle.</p> <p>The client has the choice. They can either sell their vehicle, use it as a trade-in or choose to keep the vehicle and contribute the agreed value of the vehicle.</p>
a vehicle that would meet their needs once modified	identify the modifications required and obtain a quote.
a vehicle that no longer meets their need and can't be modified, so they need a modified replacement	<p>identify a range of cost-effective vehicles, including appropriate second-hand vehicles, that can be modified to meet the client's needs and provide an estimate of the modification costs.</p> <p>A replacement vehicle may be purchased with a financial contribution from the client for the agreed value of their current vehicle.</p> <p>The client has the choice. They can either sell their vehicle, use it as a trade-in or choose to keep the vehicle and contribute the agreed value of the vehicle.</p>

The client has...	The assessor will...
no vehicle access currently and the only solution is to purchase a modified vehicle	<p>identify a range of cost-effective vehicles, including appropriate second-hand vehicles, that can be modified to meet the client's needs and provide an estimate of the modification costs.</p> <p>A vehicle may be purchased and may require a contribution from the client.</p>

The client, with support from the assessor, will identify an appropriate vehicle and will:

- arrange with the vehicle provider to have an AA Pre-purchase Inspection undertaken on the identified vehicle. Where any outstanding issues are identified by the inspection the Vehicle Provider must remedy the issues at their own cost. Where substantial issues are identified or the Vehicle Provider is unwilling to undertake any remedial work, an alternative vehicle would be considered.
- send a copy of the completed and satisfactory Pre-purchase Inspection report to ACC along with the invoice for payment of the AA Pre-purchase Inspection.

ACC will then send a decision letter to the Vehicle Provider with information on how much ACC will be contributing to the vehicle purchase.

9.4 Client contribution towards purchase of a vehicle

Where the client currently owns a vehicle, ACC will advise the client to provide a written appraisal of the current vehicle they own which identifies the following:

- The current condition of the vehicle (as assessed by a mechanic)
- The estimated trade-in and/or estimated sale value of vehicle (completed by a registered second-hand car dealer if the mechanic is not an expert)

The trade-in or sale value of the client's current vehicle will be used as a client contribution toward the purchase of another vehicle.

9.5 Managing client expectations

Some clients have expectations about the type of car they should receive, which may not align to the cost-effective options identified by the assessor. Any vehicle chosen must be able to be modified cost effectively.

Client expectations could include:

- Second hand versus a new vehicle
- Colour of the car
- Engine size
- Petrol, diesel, electric or hybrid
- Make, model or year
- 4-wheel drive / all wheel / off road
- Tow bar (non-injury related)

Any vehicle related client requests not identified as an injury related need by the assessor will be paid for at the client's expense.

Example

The assessor identifies five different cost-effective vehicle makes and models could be purchased and modified to meet the client's injury related needs. The client informs the assessor they don't like any of the vehicles recommended and insist that a further vehicle, that costs more to purchase and modify, be recommended.

	Assessor's recommended vehicles (cost)	Client's preference (cost)
Vehicles that meet the client's needs and can be modified cost effectively	\$30,000 - \$40,000	\$65,000
Modifications	\$25,000 - \$30,000	\$50,000
Total vehicle cost	\$55,000 - \$70,000	\$115,000
Less the client's current vehicle	\$22,000	\$22,000
ACC's potential contribution	\$33,000 - \$48,000	\$48,000
Client's contribution	\$0	\$45,000

9.6 Handover

Final hand over the modified vehicle

1

Pre-delivery inspection

On completion of the vehicle modifications the modifier will:

- ensure the vehicle has been inspected and, if needed, the appropriate LVV certification plate is affixed to the vehicle
- ensure that the appropriate documentation is sent to the assessor
- coordinate with the assessor and client to arrange the preferred location of the predelivery inspection

Ideally the modifier would be present at the predelivery inspection. If the modifier is not present, the modifier needs to be confident that all necessary training, information, safety warnings, and instructions of safe usage of the modified vehicle and the installed components are passed on to the person that will be operating the vehicle.

2

Final assessment

During the final meeting with client, the assessor will confirm:

- the vehicle modifications have been completed to the required standard and meet the client's injury related needs
- the vehicle has been certified by a qualified independent LVV Certifier and the plate is affixed to the vehicle, if needed
- the vehicle and any modifications have been demonstrated to the client/family or whānau (support person/s)/carers. If helpful, the assessor could supply a video recording made of the demonstration to ensure consistency
- provision of any driver training required in the use of the modified vehicle
- the client can safely operate the vehicle and that an on-road driving assessment has been completed.

- 3 The assessor then sends the ACC 6268 – Transport Assessment Completion report to ACC confirming all the above.

10 Service Quality

10.1 Quality Management Plan

A quality management plan supports the development and maintenance of quality. The supplier is encouraged to develop a plan which outlines how they ensure their assessment services are delivered to a high standard. A plan would generally outline:

- the onboarding and introduction of new staff to ACC services
- ongoing staff professional development and training
- the application of any standards documents
- regular quality monitoring as the standard
- necessary health and safety policies and procedures

10.2 Standards and Guidelines

The assessors delivering ACC's Transport for Independence Assessment Services follow the standards and guidelines set by the Occupational Therapist Board of New Zealand.

The following guidelines are in operation as at August 2022. These are available on the Occupational Therapist Boards website: [OTBNZ Standards and Guidelines](#)

 <p>OTBNZ Standards for Driving Assessm</p>	 <p>Practice guidelines Appendix A Biomech</p>	 <p>Practice Guidelines Appendix B Cognitiv</p>	 <p>Practice Guidelines Appendix C On-Roa</p>
--	---	--	--

10.3 Assessors

10.3.1 Qualifications and Experience

Every assessor in this service is qualified and registered with the Occupational Therapist Board of New Zealand. They hold a current annual practicing certificate. They also must:

- demonstrate the competencies described in the Ministry of Health vehicle purchasing and modifications Competency Framework,



MoH DSS
Competency-Framew

- or be actively engaged in a training programme working to become a fully trained and competent assessor which includes being supervised by an occupational therapist trained and assessed as competent under the MoH Competency Framework.

10.3.2 Provider training

The training of an assessor is the responsibility of the supplier.

10.3.3 Supervision and training

The roles and responsibilities for any experienced assessor acting as a supervisor for trainee assessors are:

- identify the trainee assessor's learning and development needs
- develop a training plan and set realistic goals for the trainee assessor's development
- provide the trainee assessor with the opportunity to observe the assessments being done
- provide guidance and feedback while the trainee assessor completes assessments
- review draft assessment reports completed by trainee assessors and provide constructive feedback
- promote self-directed learning, which may include getting permission from clients to Skype or video record an assessment for the supervisor's review etc.
- assess the skill and competence to provide services consistent with credentials for Vehicle Purchase and Modifications on the Ministry of Health Disability Support Services – Equipment and Modifications Competency Framework.

The funded supervision in this service is for the safety and wellbeing of the client and to ensure the client is not disadvantaged because they are being assessed by a trainee assessor in this speciality.

The supervisor can provide instruction during the assessment, but their main responsibility is to the client's safety and wellbeing.

Funded supervision is limited to up to five (5) hours of face-to-face or virtual time with the client as clinically appropriate.

10.3.4 Peer review

Peer review provides a framework to evaluate the quality of the assessment and report completed. As a learning tool it improves the quality of assessments and reports. Peer review should not be seen as a contractual requirement but as part of an ongoing quality improvement process.

Peer reviews ensure that:

- assessors uphold professional standards
- assessors are consistent in how assessments are undertaken
- reports are accurate and complete.

Note: If the assessor is in training and/or under supervision the peer review process should be more thorough to promote their learning.

10.3.5 Continuing education meetings

It is expected that assessors attend at least one continuing education meeting specific to rules, regulations, standards, and good practice relevant to Transport For Independence Assessment services and/or vehicle modifications each year.

10.4 Cultural Safety

Clients will receive culturally safe services which recognise and respect their cultural and spiritual values and beliefs. Suppliers will adhere to ACC's [Kawa Whakaruruhau \(Cultural Safety\) Policy](#).

11 Reporting and Monitoring

11.1 Supplier reporting to ACC

ACC will receive reports from the supplier electronically, in a required format or template if available.

Suppliers may also be required to complete outcome tools to measure specific outcomes.

Organisational reporting will also be submitted to ACC on a regular basis. Details of the required supplier reporting can be found in the Service Schedule.

11.2 Key Performance Indicator Monitoring

The client and ACC need Transport for Independence Assessments to be high quality to ensure the client's needs are met and their recovery and/or quality of life and independence is maximised. These objectives are from the Service Schedule and reflect ACC's focus on doing the job right the first time.

Objective	Methodology
The Assessment report received is high quality, includes a full rationale for the recommendations made. <i>Part B Clause 3.1.1</i>	ACC reviews a sample of submitted reports. This is a refined selection based on criteria. The sample size may reduce over time at ACC's discretion. Suppliers may receive feedback from ACC as these reviews take place.
ACC make decisions first time. <i>Part B Clause 3.1.2</i>	<ol style="list-style-type: none"> 1. Resubmission rates – measured using ACC data. 2. ACC reviews a sample of submitted reports. 3. ACC extracts timeliness and volume data from Eos which gives us the opportunity to see how frequently a report is submitted for a client.
The assessment is completed, and the report provided is submitted within the timeframes agreed with ACC. <i>Part B Clause 3.1.3</i>	Supplier reported within timeframe agreed with ACC. Without contracted timeframes in place, ACC will be comparing report submission timeliness between suppliers.
The Services provided are efficient and cost effective. <i>Part B Clause 3.1.4</i>	<p>The following factors will be used to compare the supplier against the national average and other suppliers based on assessment type. This provides a point of reference for a conversation rather than non-compliance.</p> <ul style="list-style-type: none"> - Cost per Claim - Length of Service

Objective	Methodology
	- Report resubmission rates
The modified vehicle is fit for purpose. <i>Part B Clause 3.1.5</i>	On exception as reported.
Referred clients do not complain about the Supplier's customer service such as personal interactions, knowledge sharing, timeliness, process management, etc. <i>Part B Clause 3.1.6</i>	ACC and the supplier will monitor client feedback as it occurs. The Supplier may choose to conduct a client survey. ACC may choose to survey ACC staff satisfaction. ACC will discuss the nature of any staff survey with suppliers in advance.

11.3 TFIA Supplier Report

The supplier will submit information that cannot be obtained by ACC any other way. The spreadsheet has three tabs:

- Tab 1 - instructions on how to fill the other two tabs
- Tab 2 - client level information
- Tab 3 - provider registration and training

TAB 2 – Client Report														
Transport for Independence Client Services Summary														
Claim Number	Client First Name	Client Surname Name	Assessor Name (Dropdown list)	Type of Assessment Requested (Dropdown list)	Type of Assessment Delivered (Dropdown list)	Date the Assessment started (dd/mm/yyyy)	Initial or subsequent assessment (Dropdown list)	Type of Specialised presentation (Dropdown List)	Report Quality Reviewed (Dropdown List/Yes/No)	No. visits to the client's home? (Number)	No. times the client visited your site? (Number)	No. of phone or telehealth consultations (Number)	Modification Coordination Required	1st Consult Date
1234567891-Numero	Text	Text	Givenname, SURNAME1 Givenname, SURNAME5 Givenname, SURNAME 10	Standard Highly Specialised Fitness to Drive Other	Standard Highly Specialised Fitness to Drive Other	Initial Subsequent	Initial Subsequent	Rear Passenger Only Non-Tetra Driver Tetra/Complex Drive Non-Wheelchair Passenger	Yes No				Yes No Yes No	dd/mm/yyyy dd/mm/yyyy dd/mm/yyyy
Field	Format/Content		Description											
A - Claim Number	1234567891													
B - Client First Name	Name		Free text											
C - Client Surname Name	Name		Free text											
D - Assessor Name	Dropdown list		Select from the dropdown list. The list is created from information on the Provider Tab.											
E - Type of Assessment Requested	Dropdown list		Standard Highly Specialised Fitness to drive Other											
F - Type of Assessment Delivered	Dropdown list		Standard Highly Specialised Fitness to drive Other											
G - Date the Assessment started	dd/mm/yyyy		The date when the assigned assessor begins any activity for the assessment											

TAB 2 – Client Report

Transport for Independence Client Services Summary													
Claim Number	Client First Name	Client Surname	Assessor Name (Dropdown list)	Type of Assessment Requested (Dropdown list)	Type of Assessment Delivered (Dropdown list)	Date the Assessment started (dd/mm/yyyy)	Initial or subsequent assessment (Dropdown list)	Type of Specialised presentation (Dropdown list)	Report Quality Reviewed (Dropdown List/Yes/No)	No. visits to the client's home? (Number)	No. times the client visited your site/s? (Number)	No. of phone or telehealth consultations (Number)	Modification Coordination Required
1234567891-Numero	Test	Test	Given name, SURNAME 1 Given name, SURNAME 5 Given name, SURNAME 14	Standard Highly Specialised Fitness to Drive Other	Standard Highly Specialised Fitness to Drive Other	Initial Subsequent	Initial Subsequent	Rear Passenger Only Non-Tetra Driver Tetra/Complex Driver No-Wheelchair Passenger	Yes No				Yes No Yes No

Field	Format/Content	Description
		such as reading the background material or phoning the client.
H - Initial or subsequent assessment	Dropdown list	Initial assessment – first ever assessment Subsequent – Any assessment done after the first ever.
I - Type of Specialised presentation	Dropdown list	Rear Passenger Only Non-Tetra Driver Tetra/Complex Driver No-Wheelchair Passenger
J - Report Quality Reviewed	Dropdown list	Yes or No Fully trained Assessors - A selection is checked Assessors In Training – All assessments
K - No. visits to the client's home?	#	This is to help ACC understand the assessor workload. It is not for performance monitoring.
L - No. times the client visited your site/s?	#	Same as above.
M - No. of phone or telehealth consultations	#	This is not a phone call to organise a meeting or to update the client on progress or to ask a brief question. It applies when part of the assessment is being done on the phone. A phone or video call of approximately longer than 10 minutes.
N - Modification Coordination Required	Y/N	Time was spent coordinating the purchase / modification of a vehicle.
O - 1st Consult Date	dd/mm/yyyy	1st consult with modifier to agree the modifications required.
P - 2nd Consult Date	dd/mm/yyyy	2nd consult with modifier after stage 1 modifications have been completed. To sign off the modifications to date and agree any stage 2 modifications.
Q - Final Consult Date	dd/mm/yyyy	Final consult with modifier for vehicle signoff after all work has been completed. This may include a test drive by the client.
R - LVV Certificate sighted	Y/N	The tag attached to the vehicle and certificate is sighted and a copy is to be included alongside the ACC completion report.

TAB 3 – Provider Training

Transport for Independence Provider Summary

As at the submission of this report the following is accurate. - List all assessors.

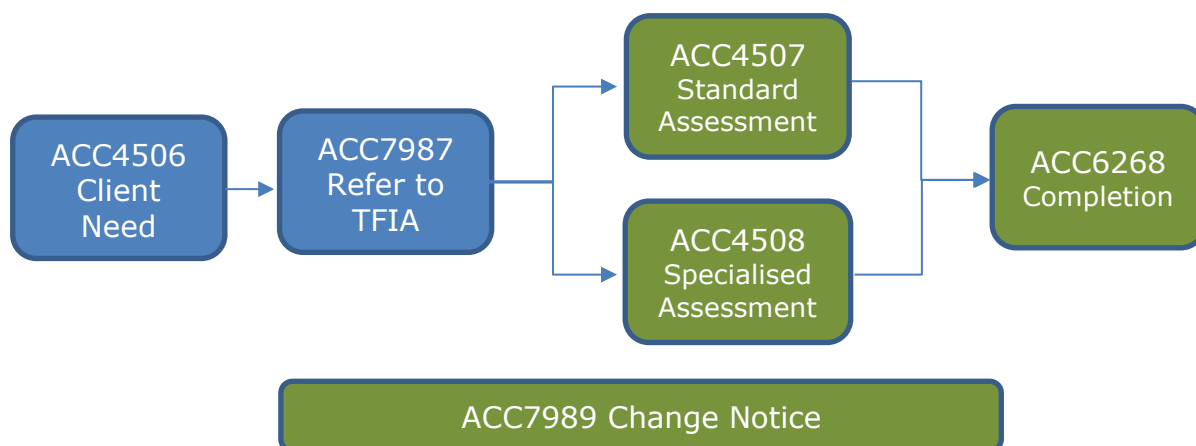
Assessor Name (Linked to Client Report via dropdown)	Experience Status for Standard Assessment (Dropdown List)	Experience Status for Fitness to Drive (Dropdown List)	Experience Status for Specialised Assessment (Dropdown List)	Comments on training progress in the period, training undertaken etc. (Free text)	Standard & Fitness to drive Assessment Training start date (dd/mm/yyyy)	Standard & Fitness to drive Assessment Training finish date (dd/mm/yyyy)	Specialised Assessment Training start date (dd/mm/yyyy)	Specialised Assessment Training finish date (dd/mm/yyyy)
Given name, SURNAME 1	Highly experience	Highly experience	Highly experience	Remove content and add your staff				
Given name, SURNAME 2	Experienced	Experienced	Experienced	Remove content and add your staff				
Given name, SURNAME 3	In training	In training	In training	Remove content and add your staff				
Given name, SURNAME 4	Not training as yet	Not training as yet	Not training as yet					

Field	Format/Content	Description
A - Assessor Name	Given name, SURNAME	This field provides content to the Client Report tab by be the source of the dropdown list in that Tab.
B – Experience Status for Standard Assessment	In training or Experienced or Supervisor	These fields record the status or experience / training level of the listed provider for each kind of assessment.
C – Experience Status for Fitness to Drive		
D – Experience Status for Specialised Assessment		
E - Comments on training progress in the period, training undertaken etc.	(Free text)	Write a description of how the trainee assessor is progressing with their training.
F – <i>Standard & Fitness</i> to drive Assessment Training start date	(dd/mm/yyyy)	The date the trainee began their training to deliver standard and fitness to drive assessments.
G - <i>Standard & Fitness</i> to drive Assessment Training finish date	(dd/mm/yyyy)	The date the trainee finished their training to deliver standard and fitness to drive assessments.
H – <i>Specialised</i> to drive Assessment Training start date	(dd/mm/yyyy)	The date the trainee began their training to deliver specialised assessments.
I - <i>Specialised</i> to drive Assessment Training finish date	(dd/mm/yyyy)	The date the trainee finished their training to deliver specialised assessments.

11.4 Service Forms

There are six forms used in this service. All of the supplier forms are available on ACC's website.

The supplier will use the correct form at the appropriate time. ACC will measure timeliness and completion based on the submission of these forms.



Forms (available on acc.co.nz)	What the form does <i>See the form field summary</i>
ACC4506 Determine transport needs form summary	This form is used by ACC to collect information about the client's life and transport needs. It will be included when ACC refers a client to the supplier for a standard or specialised assessment. It is not required when ACC refers for a Fitness to Drive assessment.
ACC7987 Transport for Independence Assessment Referral form summary	This form is completed by ACC and is sent to the supplier when a client is referred for any TFIA assessment.
ACC4507 Transport for Independence – standard assessment form summary	This form is submitted by the supplier to report on a standard assessment including the types of vehicles that would meet the client's needs and the detail of any modifications necessary.
ACC4508 Transport for Independence – specialised assessment form summary	This form is submitted by the supplier to report on a specialised assessment including the types of vehicles that would meet the client's needs and the detail of any modifications necessary.
ACC7989 Notice of Change form summary	<p>This form is sent to ACC by the supplier in the following circumstances:</p> <ul style="list-style-type: none"> - a purchase order is required for hours in excess of the maximum stated in the Service Schedule - the type of assessment has changed - the additional hours available in the contract have all been used - the agreed reporting timeframe, as notified to the client and ACC, have changed - the client did not attend their scheduled appointment

Forms (available on acc.co.nz)	What the form does See the form field summary
	<p>All circumstances require the provision of a detailed explanation.</p> <p>ACC may contact the supplier to discuss the situation.</p>
ACC6268 TFI assessor service completion report form summary	<p>This form is submitted by the supplier after the:</p> <ul style="list-style-type: none"> - modifications are complete - the LVVTA certificate is sighted - the car is approved - the client's ability to drive safely is confirmed such as a driving assessment and driver training.

11.5 Managing client non-attendance (Did not attends)

The supplier will minimise client non-attendance by:

- Confirming the appointment in writing and informing clients they must give at least 24 hours' notice if they are unable to attend their appointment, and
- sending a reminder email or text message, or
- calling the client prior to their appointment

TFIADNA1	Client did not attend - Standard Assessment	One occurrence
TFIADNA2	Client did not attend - Specialised Assessment	Up to 3 hours per referral 40% (onsite) or 60% (offsite)

12 Appendices

12.1 ACC4506 Determine transport needs *form summary*

This form is completed with the client via one or more interviews. This summary outlines the information collected:

Section	Topics covered
Client details	Name, date of birth and claim number.
Background	Rehabilitation goals Barriers or problems with daily activities Barriers or problems with transport Health issues affecting a use of a vehicle
Occupation	Pre-injury occupation Getting to work before injury Getting to work now? Work (employment) status before and after injury

Section	Topics covered
Driving status prior to injury	Regularity of driving Licence details
Vehicle use	Vehicle ownership Frequency of use of the vehicle
Transport in Daily Life	<p>Prior to injury and now.</p> <ul style="list-style-type: none"> - Health impacts that affect ability to drive - Family responsibilities to transport - Transporting own disability equipment - Transporting own recreational equipment - Transport equipment for others <p>Prior to injury, now, how often, distance return trip</p> <ul style="list-style-type: none"> - Travelling to attend treatment of rehabilitation - Travelling for home or domestic tasks like shopping - Travelling to work - Recreations or community activities - Other - Anyone who can help
Consider options to meet needs	<p>Discussion of each option with the client and ACC agreeing a solution that will meet their need. None of these require a referral to this service.</p> <ul style="list-style-type: none"> - Public transport - Mobility aid / equipment - Taxi service - Short term hire vehicle
Information for the assessor	<p>If none of the options are suitable then additional information is collected.</p> <ul style="list-style-type: none"> - Modify client vehicle - Driver if the client is a permanent passenger, driving licence expiry - Client's vehicle details - Make, model, year, odometer, manual or automatic, mechanical issues, mechanical report, warrant of fitness, licence & registration, estimated value, valuer, ACC contribution if any for this or any previous vehicle, purchase or modification history.
Once the interview is at an end ACC will complete the remainder of the form	
ACC use	Cost of viable options Select the best option
ACC contact details	The person that sent the referral

12.2 ACC7987 Transport for independence Assessment referral form summary

The referral form provides the assessor with the information they require to immediately contact the client and begin the referral. The referral will have the ACC4506 attached for two of the three assessments.

Section	Topics covered
Assessment Required	This tick box identifies which assessment is required and if it was the initial or subsequent assessment and the date the assessment was completed.
Client Need	This identifies why the client needs this assessment. There are two options (ACC4506 or client circumstances) and a description of circumstances.
Supplier details	This outlines who the client is referred to.
Client details	The client's details including ethnicity, gender, cultural support, interpreter, address, multiple preferred methods of communication and representative/alternative contact details.
Claim details	The client's injury details including date of injury, accident description, injury description, TBI and SCI clinical information.
Driving status	Regularity of driving and licence status.
General Practitioner details	The client's GP details.
Risks	Risks to the assessor in visiting the client.
Providers	Details of any other providers delivering services to the client.
Documents	<p>ACC will indicate the documents attached to the referral</p> <ul style="list-style-type: none"> • Consent • ACC4506 – Determine Client Transport Needs (Notes of client interview) • Medical reports relevant to transport needs • Neuropsychological Assessment report - essential for driving assessment if TBI • GP/ Specialist clearance to proceed to a driving assessment • Wheelchair & Seating – completed within the last 12 months • Housing Assessment – if modifications pending or completed within last 6 months • Social Rehabilitation Needs Assessment – if relevant to transport needs • Mechanical Assessment of current vehicle (if subsequent vehicle request)
ACC details	This is the ACC contact person who is sending the referral.

12.3 ACC4507 Standard Assessment *form summary*

This form is completed when the assessor has completed a standard assessment.

Section	Topics covered
1. Client details	Client name, claim number, residential and/or hand-over address.
2. ACC details	The ACC staff member who is supporting the client.
3. People who attended the assessment	Name, relationship to the client, contact number and how they participated.
4. Assessor comments on recommended transport option	The assessor is reflecting on the recommendations in ACC4506 Determine Transport Needs and either supporting or making their own recommendations.
5. Information referenced	Confirming the information sources used during the assessment.
6. Injury and mobility	Describing the impact of the client's injury Confirming the client's preinjury transport needs in the ACC4506 is accurate or describing what they have determined.
7. Health status	Confirming if the client has <ul style="list-style-type: none"> - any health issues that may affect their ability to use a vehicle. - clearance from a medical professional to operate a vehicle - the client's weight and height
8. Functional ability	Describing the <ul style="list-style-type: none"> - range of motion and strength of neck, trunk, upper limbs (R/L), lower limbs (R/L). - Coordination, speed of movement, endurance, pain, balance (Sitting balance/trunk support) - Support required at destination - Client independence if they are a driver
9. Driving assessment	Explaining the need for a driving assessment
10. On-road assessment	Date of the assessment Vehicle used in the on-road assessment Assessment location and conditions Confirmation of safe use of the vehicle
11. Vehicle access at home	Access Vehicle transfer Any environmental changes needed to facilitate the access and transfer.
12. Mode of travel	Confirming the client will be the driver or a front/back seat passenger.

Section	Topics covered
13. Other people and items to be transported	Number of people and their relationship to the client Type and details of the wheelchair Any equipment that might be transported the cost-effective option to transport the equipment
14. Vehicle modifications – client is the driver	Modifications needed to enable this client to use a standard vehicle travelling as the driver. - Modification type, side of the vehicle, outcome achieved and estimated cost.
15. Vehicle modifications – client is the passenger	Modifications needed to enable this client to use a standard vehicle travelling as a passenger. Modification type, side of the vehicle, outcome achieved and estimated cost.
16. Driver training needed to use vehicle modifications	Confirming the need for driver training with an estimate of the hours required and the driving instructor and estimated costs. Note: The supplier will be purchasing these directly and be reimbursed by ACC via the TFIA16 Driver training per hour code.
17. Vehicle suitability for modification	Clarifying the client's or another vehicle's suitability for modification.
18. Specific vehicle features	A list of the vehicle features that are required and why.
19. Vehicle type	List of the makes and models of vehicles that can be modified to meet the client's needs.
20. Additional relevant information	Open text field to enable the assessor to provide any additional comments that might be relevant.
21. Assessor declaration and signature	Standard declaration.

12.4 ACC4508 Specialised Assessment form summary

This form is completed when the assessor has completed a standard assessment.

Section	Topics covered
1. Client details	Client name, claim number, residential and/or hand-over address.
2. ACC details	The ACC staff member who is supporting the client.
3. People who attended the assessment	Name, relationship to the client, contact number and how they participated.
4. Assessor comments on recommended transport option	The assessor is reflecting on the recommendations in ACC4506 Determine Transport Needs and either supporting or making their own recommendations.

5. Information referenced	Confirming the information sources used during the assessment.
6. Injury and mobility	Describing the impact of the client's injury Confirming the client's preinjury transport needs in the ACC4506 is accurate or describing what they have determined.
7. Health status	Confirming if the client has <ul style="list-style-type: none"> - any health issues that may affect their ability to use a vehicle. - clearance from a medical professional to operate a vehicle the client's weight and height
8. Functional ability	Describing the <ul style="list-style-type: none"> - range of motion and strength of neck, trunk, upper limbs (R/L), lower limbs (R/L). - Coordination, speed of movement, endurance, pain, balance (Sitting balance/trunk support) - Support required at destination Client independence if they are a driver
9. Driving assessment	Explaining the need for a driving assessment
10. On-road assessment	Date of the assessment Vehicle used in the on-road assessment Assessment location and conditions Confirmation of safe use of the vehicle
11. Mode of travel	Confirming the client will be the driver or a front/back seat passenger.
12. Primary wheelchair details	
13. Vehicle access at home	Access Vehicle transfer Any environmental changes needed to facilitate the access and transfer.
14. Other people and items to be transported	Number of people and their relationship to the client Type and details of the wheelchair Any equipment that might be transported the cost-effective option to transport the equipment
15. Getting in and out of the vehicle	Ramp gradient, hoist details, turning space in the vehicle, type, and method of securing the wheelchair in the vehicle.

16. Vehicle modifications – Client is the passenger	Modifications needed to enable this client to use a standard vehicle travelling as a passenger. Modification type, side of the vehicle, outcome achieved and estimated cost.
17. Vehicle modifications – Client is the driver	Modifications needed to enable this client to use a standard vehicle travelling as the driver. Modification type, side of the vehicle, outcome achieved and estimated cost.
18. Driver training needed to use vehicle modifications	Confirming the need for driver training with an estimate of the hours required and the driving instructor and estimated costs. Note: The supplier will be purchasing these directly and be reimbursed by ACC via the TFIA16 Driver training per hour code.
19. Specific vehicle features	A list if the vehicle features that required and why.
20. Vehicle type	List of the makes and models of vehicles that can be modified to meet the client's needs.
21. Additional relevant information	Open text fiend to enable the assessor to provide any additional comments that might be relevant.
22. Assessor declaration and signature	Standard declaration.

12.5 ACC7989 Notice of Change in TFIA Service *form summary*

Suppliers have been empowered to adapt to the client's need within the service. The supplier is required to notify us of the adaptation or in the case of exceptional hours, request a purchase order.

Section	Topics covered		
Client Details	This has been simplified to the client's name and number. Ensure the claim number is correct. The supplier may be contacted if the claim number is incorrect.		
Purchase order Request	A purchase order can be requested in exceptional circumstances.		
		TFIA05 Standard	TFIA28 Specialised
	Hours	15 Hours	15 hours
	Additional	5 hours	22 hours
	<i>Exceptional</i>	<i>Hours over the 20 max.</i>	<i>Hours over the 37 max.</i>
	The rationale provided needs to explain what are the exceptional circumstances. The supplier should apply in advance of service delivery, as it as at ACC's discretion to provide a purchase order.		

Section	Topics covered												
Assessment Type	<p>The supplier can change the type of assessment when the client meets the criteria of the assessment, and their injury related need requires a different type of assessment.</p> <ul style="list-style-type: none">- Medical fitness to drive changed to a standard or specialised assessment- Standard changed to a specialised assessment <p>The supplier will outline the criteria and circumstance that requires a change in the assessment.</p>												
Service Delays	<p>When the referral is received the supplier will notify the client and ACC of the expected timings of the first appointment with the client at their home, the assessment report and completion report. These delivery dates are estimations but remain a goal unless circumstances change.</p>												
Additional Hours	<p>The supplier can utilise the additional hours when a client’s assessment/coordination is identified as more complex than usual.</p> <table><tr><td></td><td>TFIA05 Standard</td><td>TFIA28 Specialised</td></tr><tr><td>Initial Hours</td><td>15 Hours</td><td>15 hours</td></tr><tr><td>Additional</td><td>5 hours</td><td>22 hours</td></tr><tr><td>Total</td><td>20 hours</td><td>37 hours</td></tr></table> <p>Suppliers are required to provide us with an explanation of why the additional hours are needed.</p>		TFIA05 Standard	TFIA28 Specialised	Initial Hours	15 Hours	15 hours	Additional	5 hours	22 hours	Total	20 hours	37 hours
	TFIA05 Standard	TFIA28 Specialised											
Initial Hours	15 Hours	15 hours											
Additional	5 hours	22 hours											
Total	20 hours	37 hours											
Client did not attend	<p>When a client does not attend a scheduled appointment and does not give the supplier at least 24 hours prior notification, the supplier can claim for the missed time.</p> <p>Supplier are required to outline why the client missed the appointment and the steps they took prior to ensure the client was best placed to attend the appointment.</p>												

12.6 ACC6268 TFI assessor completion report form summary

This form is a completed when the assessor and client agree that the modified vehicle meets the client's injury related transport needs. Submission of this form by the supplier signals the end of the service.

Section	Topics covered
Client details	Client name, claim number, residential and/or hand-over address.
Assessor details	The provider who completed the assessment
ACC details	The ACC staff member who is supporting the client
Vehicle details	Vehicle details, modification details, certification plate (LVVTA), driving tuition. Any additional recommendations

Client declaration and signature	Client acceptance of the modified car
Assessor declaration and signature	The assessor confirmation that the vehicle and modifications meet the client's injury-related transport needs

12.7 What's covered by the Vehicle Modification Service?

The following content is transferred (and updated where appropriate) from the 2017 version of the Vehicle Modification Service Operational Guidelines.

Vehicle modifications are categorised into three levels according to the level of complexity of the modification. The three levels are:

Level 1 Vehicle Modifications – *standard modifications*

These include:

- hand control installation
- left/right foot accelerator pedal installation
- ancillary control modifications
- wheelchair (unoccupied) lifting equipment and installations
- roof rack wheelchair hoist installation
- other vehicle modifications as required by ACC.

Level 2 Vehicle Modifications - *modifications that will enable the client to travel seated as a passenger in their wheelchair in the rear of the vehicle*

These include:

- wheelchair (occupied) lifting equipment or ramps
- installation of anti-rotational wheelchair restraining systems and/or tie down systems to the rear passenger position; and
- wheelchair bracket to secure into the anti-rotational wheelchair restraining system.

Level 3 Vehicle Modifications - *highly specialised modifications requiring structural changes to the vehicle.*

These include:

- sourcing and direct purchase of an approved vehicle solution
- Stage 1 Vehicle Modifications - all modifications required to enable a wheelchair user to enter the vehicle and access the driver position (unassisted) and/or front/rear passenger position whilst seated in their wheelchair, including:
 - installation of ramps or platforms; and/or
 - modifications to the floor of a vehicle enabling it to be wheelchair accessible

- installation of anti-rotational wheelchair restraining systems to the driver and front/rear passenger positions and an interchangeable driver/passenger seat.
- Stage 2 Vehicle Modifications - all modifications required to enable the person to operate and control the vehicle on New Zealand roads (self-drive conversion) or to safely travel in the vehicle (passenger conversion)

Self-drive conversions include (but are not limited to):

- wheelchair bracket to secure into the anti-rotational wheelchair restraining system
- appropriate hand control systems to meet the Client's specific injury related needs to enable them to safely operate and control the vehicle on New Zealand roads
- appropriate steering modifications/controls to meet the Client's specific injury related needs to enable them to safely operate and control the vehicle on New Zealand roads
- ancillary controls to enable the Client to safely operate vehicle systems (e.g. indicators, lights and wipers).

Passenger conversions include (but are not limited to):

- wheelchair bracket to secure into the anti-rotational wheelchair restraining system, or a suitable wheelchair restraint system.

12.8 What isn't covered by the Vehicle Modification Service?

Mobility equipment, such as mobility scooters, are excluded from the Vehicle Modification Services contract but can be purchased via the Managed Rehabilitation Equipment Services (MRES) contract where appropriate.

All-terrain vehicles (ATVs) are also generally excluded from this service. Requests for ATVs will be escalated and considered on a case-by-case basis by ACC's Technical Services team.

13 Table of Changes

This is an ACC document. It is intended to be a 'living document'. Any future amendments to these Operational Guidelines will be agreed in advance between suppliers and ACC. Grammatical or formatting changes can be made at ACC's discretion and will not be recorded here.

Date Issued	What Changed	Drafter
1 December 2022	1 st draft published	Carol Krishnan
30 November 2023	1 st final version published	Carol Krishnan