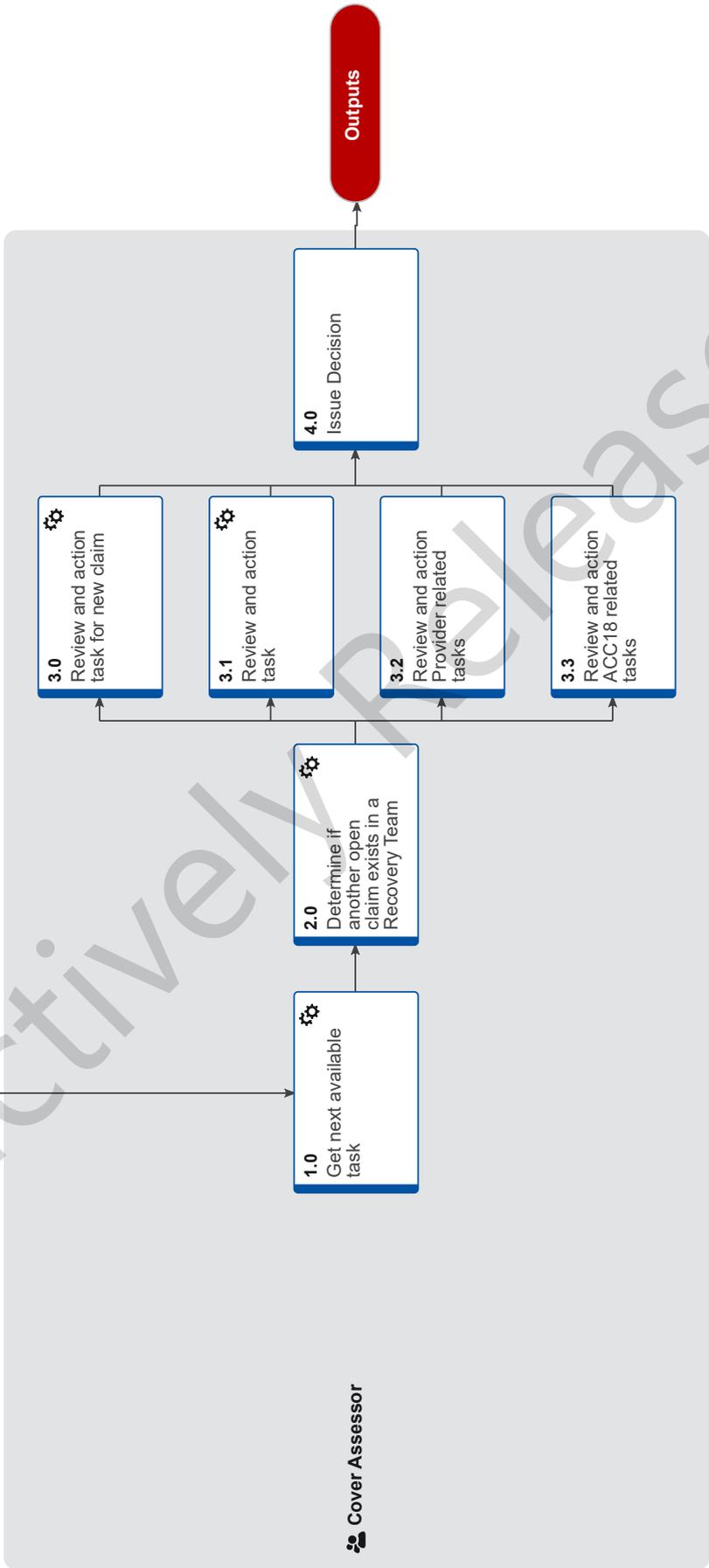




Triggers & Inputs



Cover Assessor

Summary

Objective

To provide guidance on self allocation of tasks from the Mental Injury queue.

Background

This is a manual workaround for Cover Assessors who do not have WFM through Salesforce

Owner Name Withheld

Expert Name Withheld

Procedure

1.0 Get next available task

Cover Assessor

- a** In Eos, View tasks, Choose Role, select Cover assessment - Mental Injury Assessment, click OK.
- b** Use 'Get Next Task' to self-allocate the next available task in the queue.

2.0 Determine if another open claim exists in a Recovery Team

Cover Assessor

- a** In Eos, navigate to the Party Record, and check for any claims being actively managed by a Recovery Team.

NOTE **Is there another indicator to show other actively managed claims?**

The yellow indicator in the General Screen shows the client has an actively managed claim.

NOTE **What if there is an actively managed claim?**

Go to Match Claim to Recovery Team.

This process ends.

PROCESS Match Claim to Recovery Team

3.0 Review and action task for new claim

Cover Assessor

- a** Open the claim by clicking on the claim number in the task.

NOTE **What if the task is for general cover but in Cover Assessment - Mental Injury Assessment queue ?**

Transfer the claim and any associated tasks to the Cover Assessment - General Cover queue. This process ends.

NOTE **What if the task is Auto Alert 1 (New Claim) task - Or Confirm Cover Task set to Day 0**

- Click on the task tab and transfer the other open tasks that you can also action (to prevent other team members taking those tasks for the same claim). e.g there is also a Contact Party and Alert Mail task open on the claim.

- b** Review the claim and determine if you can make a decision.

NOTE **What if the Claim WRMI**

Process "Make Cover Decision for Work-Related Mental Injury Claims

PROCESS Make Cover Decisions for Work-Related Mental Injury Claims

NOTE **What if there is missing information that is needed to help determine making a decision?**

Go to Request Clinical Records process.

PROCESS Request Clinical Records

NOTE **What if you need to clarify the diagnosis, accident details or other details with the Provider?**

Contact the Provider, add a contact (in the Contact tab) in Eos recording the conversation. If able to make a decision and it does not meet criteria MICPI, WRMI then decision claim

NOTE **What if a full assessment is needed to determine cover?**

Do an initial assessment and update the 'Confirm Cover Decision' task confirming you have:

Checked the ACC45 Y
Checked for any duplicates Y
Checked MFP/Pathway Y
Checked Claim history Y
Checked Party level documents / contacts Y

NOTE What if you're unable to issue a decision and further assessment/clarification is required for a Mental Injury claim?

- Close Auto Alert 1 (New Claim) task.
- Click on the "Task" tab on the General Screen and transfer the other open tasks that you can also action (to prevent other team members taking additional tasks for the same claim). e.g there is also a Contact Party and Alert Mail task open on the claim.

- Update the 'Confirm Cover Decision' task with the correct cover decision due date of the claim (taken from the General Screen). Transfer the task back to the Cover Assessment - Mental Injury Assessment queue.

- If requesting medical notes create and update a "Follow Up Provider" task. Move the task date out by 5 working days and transfer the task to the Cover Assessment - Mental Injury Assessment queue.

When requesting notes put the return email address as coverassessment@acc.co.nz.

- If you have requested information from a client (e.g questionnaire, photos etc) create and update a "Follow up Claimant Information Request" task. Move the task date out by 5 working days and transfer the task to the Cover Assessment - General Cover queue.

-Update the 'Confirm Cover Decision' task to the cover decision due date of the claim (as noted on the General Screen). Transfer the task back to the Cover Assessment - General Cover queue.

PROCESS Make Cover Decisions for Mental Injury Caused by Physical Injury

NOTE Arrange Mental Injury Assessment for Cover Process

Go to Arrange Mental Injury Assessment for Cover Process

PROCESS Arrange Mental Injury Assessment for Cover

NOTE What if you have been unable to contact the provider of client to clarify information?

Create and update a "Follow Up Provider" and/or "Follow up Claimant Information request" task. Move the task date/s to the following working day. Transfer the task/s to the Cover Assessment - Mental Injury Assessment queue. Record the contact attempt as a contact in the "Contacts" tab.

NOTE What if the task is for a 'Alert you have Mail'?

Check to see if there is an associated 'Follow Up Provider' task.

- Check the original request to confirm you have received all the information requested. If information is missing, contact the Provider. Add a contact on the claim. Reset the 'Follow Up Provider' task to show what you are waiting for, move the target date for a further 5 working days and transfer back to the Cover Assessment - Mental Injury Assessment queue.

Update the 'Confirm Cover Decision' task with activity carried out.

-If you need to seek Internal Guidance follow the Seek Internal Guidance Process:

- If the task is a returned external psychologist or psychiatrist report, see existing CHIPS process for referring for internal Branch Advisor Psychologist comment.

- If the task is checking for an internal comment that is available, refer to existing CHIPS process regarding which sign offs are required. If all required sign offs are obtained, refer to issue cover decision process.

Note - If the initial internal guidance is to seek formal written comment from a medical advisor, create an ACC6260 on the 'Documents' tab. Fill in the relevant details (claims, documents, question for clinical etc), Create an 'Organise Internal Referral' task and move the task date out by three days. Create a 'Complete Internal Referral' sub-task off the 'Organise Internal Referral' task. Link the necessary documents to the task and transfer the Complete Internal Referral task to 'Regional Clinical Advice - Central queue. If the claim is INCAP Transfer the Organise Internal Referral task to the Cover Assessment - General Cover queue. Update the Confirm Cover decision task with the action taken.

-Close the 'Alert you have Mail' task and the other tasks that you have actioned.

-Update the 'Confirm Cover Decision' task with activity carried out.

C Determine if you have enough information to make a decision.

NOTE What if you need to seek internal guidance?

Go to the Seek Internal Guidance process

PROCESS Seek Internal Guidance

3.1 Review and action task

Cover Assessor

a Open the claim by clicking on the claim number in the task.

NOTE What if there are tasks that can be actioned at the same time?

Transfer the tasks into your queue to action.

b At Claim level check for any tasks that can be actioned at the same time.

NOTE What if the task is for Follow up Claimant Information Request

-If the information has not been received (check in the "Documents" tab). Follow up with the client again for the information needed. Note attempt in "Contact's" tab. Update the task move the date to the following working day and transfer back to the Cover Assessment - General Cover queue.

-If the information has been received and you can issue a decision go to Activity 4.0 Issue Decision.

-If a decision can not be issued and further medical information is needed request the information and create and update a "Follow Up Provider" task update the date to 5 working days and transfer to the Cover Assessment - General Cover queue. Close the Follow Up Claimant Information Request task.

-When requesting notes make sure to put the return email address as cover.assessment@acc.co.nz.

-Update the Confirm Cover Decision tasks with your action.

NOTE What if the task is 'Contact Party'?

-Click on the task tab and transfer the other open tasks that you can also action (to prevent other team members taking additional tasks for the same claim). e.g there is also an Alert Mail task open on the claim.

-Check the Contact Party task to see who has called and what the query or need is. Review the claim history before contacting the client

-If an attempt is made but unsuccessful add a Contact in Eos to record the attempt. Update the 'Contact Party' task move out to the following day, and transfer the task back to the Cover Assessment - General Cover queue.

-If contact has been made close the 'Contact Party' task. Ensure that all appropriate actions or tasks that could be completed on the claim have been.

NOTE What if the task is Organise Internal Referral?

-Go to the claim and check the requested information is on the claim. This could be under the Documents tab or on the Recovery Support Tab on the General Screen. Review the internal advice provided to determine next steps.

-If recommendation supports you to make a decision, check CHIPS process to ensure all necessary sign offs are obtained and if so, go to Activity 4.0 Issue Decision.

-If the request is to obtain further information, follow Requesting Medical Information process.

NOTE What if the task is a 'General' task - User to enter details'

The 'General' task could relate to a number of different requests from any part of the business. You will need to review the task and the claim history to determine next steps. Action the task and closed once completed.

NOTE What if the task is a completed ACC6300 Consent Form?

Check the file to check to determine what records we require this consent form to obtain. This may include employer, Police, interim supports, previous counselling etc.

- Request these records as per existing notes request process.

d What if the task is a "Follow up Employer" task for employer records request? - Contact the employer and follow up the request. Update the contacts tab, and the task, and place the task out 5 working days.

3.2 Review and action Provider related tasks

Cover Assessor

a Open the claim by clicking on the claim number in the task.

NOTE What if the task is for a Follow Up Provider task relating to a request for medical notes?

-Go into 'Tasks' and the 'Documents' tab on the claim to see if there is any associated 'Alert: You have Mail' or 'AUTO: You have Mail Medical Notes added' or that the requested documents have been scanned to file. You should also check in the Party Level Documents tab, in case they have been scanned in at the Party level.

-If there are no 'Alert Mail' tasks and the information has not been received, then contact the Provider to follow up on the request. Add a contact to the 'Contacts' tab on the claim and set the task out for a further 5 working days and return the 'Follow Up Provider' task to the Cover Assessment - General Cover queue. Update the 'Confirm Cover Decision' task with activity carried out.

-If there is an associated "Alert Mail" task or 'AUTO: You have Mail Medical Notes' and all the information you need has been received transfer all the "Alert Mail" tasks into your name and other tasks that you can action (to prevent other team members transferring additional tasks for the same claim), and determine next steps: -If you can issue a decision go to Activity 4.0 Issue Decision.

-If you need to seek internal guidance go to the Seek Internal Guidance process.

-If further information is required, request the information and update the 'Follow Up Provider' or 'Follow Up Claimant Information Request' task as per templates, move the task out for 5 working days (provider) or the following day (client) and transfer the task to the Cover Assessment - General Cover queue.

Note - If the initial internal guidance is to seek formal written comment create an ACC6260 on the 'Documents' tab. Fill in the relevant details (claims, documents, question for clinical etc), Create an 'Organise Internal Referral' task and move the date out by three working days. Create a 'Complete Internal Referral' as a subtask off the Organise Internal Referral task. Link all the necessary documents to the task and transfer the Complete Internal Referral task to 'Regional Clinical Advice - Central queue. Transfer the 'Organise Internal Referral' task to the Cover Assessment - General Cover queue.

-Update the Confirm Cover decision task with the action taken.

 **PROCESS** Seek Internal Guidance

3.3 Review and action ACC18 related tasks

Cover Assessor

a Open the claim by clicking on the claim number in the task.

NOTE What if it's an ACC18 task, but relates to an actively managed claim in a Recovery Team?

Go to Match Claim to Recovery Team process.

PROCESS Match Claim to Recovery Team

NOTE What if it's an ACC18 task but relates to a claim in an 'Actioned Cases' queue?

-Review the information and determine whether this is for an additional diagnosis request.

-Update the diagnosis on the Injury tab and put to "investigating"

-Review the 'Traffic Light' Tool to establish if the injury is one you're able to issue a decision.

-If you're able to issue a decision go to Activity 4.0 Issue Decision

-If you are unable to make a decision review the Assess Cover for an Additional Injury or Change in Diagnosis process.

-If further assessment is required create a 'Follow Up Cover' task with the target date as one day prior to the due date (This is to manage the timeframe and prevent a deemed decision), transfer this task to the Cover Assessment - General Cover queue.

Note - The date of the ACC18 tasks must reflect the Cover Decision due date on the diagnosis. This will need to be calculated manually (21 days from the date we received the ACC18 or 90 days if the diagnosis is late lodged).

For Late Lodged - This is 2months from date of lodgement

PROCESS Assess Cover for an Additional Injury or Change in Diagnosis

4.0 Issue Decision

Cover Assessor

a Accept claim, decline claim, or accept and decline claim.

NOTE What if you can accept cover?

Go to Accept Claim, and follow this process, however please replace CVR41 letter with CVR51 (Mental Injury) letter

PROCESS Accept Claim

NOTE What if you are declining the claim?

Go to 'Decline Claim'.

PROCESS Decline Claim
