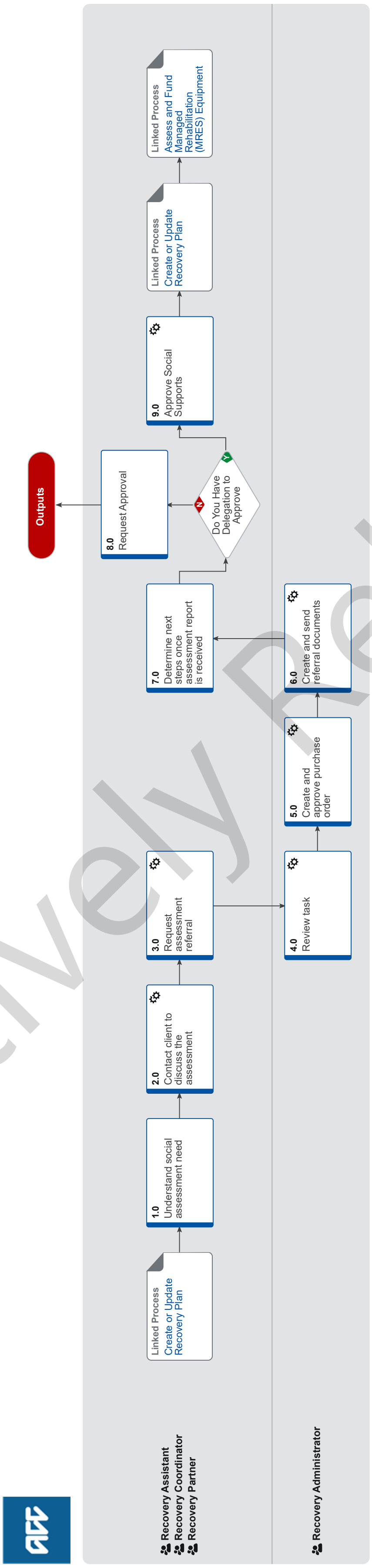
Arrange Communication and Assistive Technology Assessment v16.0



Arrange Communication and Assistive Technology Assessment v16.0

Summary

Objective
To arrange Communication and Assistive Technology Assessment (CATA). This assessment identifies a client's assistive technology needs including trialling of assistive technology and training that contributes towards an improved functional communication outcomes for the client.

Background
CATA is part of the Social Rehabilitation Assessments contract for more information about the service refer to the Service Page. The assessment includes equipment trial, setup, fitting and training.

Examples of Communication Assistive Technology includes, but isn't limited to:
• Augmentative and Alternative Communication (AAC) - both unaided and aided methods of communication
- Unaided communication systems rely on the user's body to convey messages. Examples include gestures, body language, and/or sign language
- Aided communication methods can include paper and pencil, communication books or boards, devices that produce voice output (speech generating devices or SGD's) and/or written output. Electronic communication aids allow the user to use picture symbols, letters, and/or words and phrases to create messages

• Computer Access Aids can include head pointers, modified or alternate keyboards, switches activated by pressure, movement, or sound, touch screens, special software, eye-gaze technology, or speech to text software that enable persons with disabilities to use a computer

• Environmental Controls are any piece of equipment that allows an individual with a disability to control aspects of their environment that are operated by electricity, eg: lights, TV, telephone, etc.

Owner Name Withheld

Expert Name Withheld

Procedure

PROCESS **Create or Update Recovery Plan**
Recovery Assistant, Recovery Coordinator, Recovery Partner

1.0 Understand social assessment need
Recovery Assistant, Recovery Coordinator, Recovery Partner

a Confirm the client's need for the assessment.

For more details about this assessment go to the information below:

- Communication and Assistive Technology Assessment Service Page
- Types Of Assessment Service Page
- Needs assessment for social rehabilitation Policy

NOTE **What do you need to consider when the entitlement request is received and deemed cover exists?**
Refer to the Deemed Cover and Entitlements Policy for considerations to determine client entitlement eligibility while in deemed cover period.

- Deemed Cover and Entitlements Policy

2.0 Contact client to discuss the assessment
Recovery Assistant, Recovery Coordinator, Recovery Partner

a Check that the client has granted ACC the authority to collect medical and other records.

- View Client Consent

NOTE **What if the client has not granted ACC authority to collect medical and other records?**
You will need to obtain the client's authority to collect medical and other records. Go to (NGCM) Obtain Client Authority to Collect Information.
PROCESS Obtain Client Authority to Collect Information

b Contact the client and confirm you are speaking with the right person by asking ACC's identity check questions.

- Identity Check Policy

c Explain that you are referring them for this assessment, why the assessment is required, as well as what their rights and responsibilities are. Ensure your client understands and agrees with the referral.

- Client Legislative Rights and Responsibilities Policy

NOTE **What else do you need to discuss with the client?**
• the provider will be in touch to arrange a suitable appointment
• they are welcome to have a support person accompany them
• the provider will send us a report which we will send them a copy of.

NOTE **What if the client does not agree to participate?**
Find out why the client does not want to participate and consider their reasoning and alternatives. Go to Seek Internal Guidance if your unsure how to proceed.
PROCESS Seek Internal Guidance

d In Salesforce, add a contact note as a record of the conversation.

e Add the agreed intervention to the Recovery Plan.

NOTE **How do I update the Recovery Plan?**
Go to Create or Update Recovery Plan.
PROCESS Create or Update Recovery Plan

NOTE **The Recovery Team Member must ensure all known participants are loaded on the file and then removed when they are no longer relevant. Loading the "vendor/provider" as a participant enables the Recovery Administration to validate the email and then email the purchase order directly from Eos if required. For information on how to manage participants, refer to Manage Participants (Eos Online Help).**

Manage Participants (Eos Online Help)

Contracted Suppliers by Geographic Area of Coverage

3.0 Request assessment referral

Recovery Assistant, Recovery Coordinator, Recovery Partner

a In Eos, find all the documents that need to be sent along with the referral. In most circumstances there are no additional documents required.

NOTE **What documents do you need to include?**
• Relevant clinical history eg specialist reports , neuropsychological assessments
• Any previous Assessment Report(s) relevant to the current circumstances where a communication need or barrier was identified and assessment was recommended, eg, social assessments, housing assessments, training for independence reports, copies of any previous Assistive Technology Assessment reports.

NOTE: Make sure you exclude any unnecessary sensitive personal information.

NOTE **What do you do if you don't have all the information to complete the referral?**
Go to Request Clinical Records. Once received, return to this process.
PROCESS Request Clinical Records

b Perform privacy checks on documents.

Privacy Check Before Disclosing Information Policy

NOTE **What do you need to check?**
Check documents:
• are relevant to the referral
• do not contain any third-party information
• do not contain any other information that needs to be withheld.

For details on what checks you need to complete before sending documents out, refer to NG SUPPORTING INFORMATION Inbound and Outbound Document Checks.

NG SUPPORTING INFORMATION Inbound and Outbound Document Checks

NOTE **What if you find information that needs to be redacted?**
Send an email to Recovery Administration (recoveryadmin@acc.co.nz) and include the document to be redacted plus your redaction instructions, before adding the document to the document group.

NGCM - Redact information from PDF documents

c Create a referral-specific document group and enter 'Communication and Assistive Technology Assessment' and todays date in the document group description field.

d If required, add the documents to the group.

NOTE **What if there are documents from other claims that are relevant to the assessment?**
When a request for a referral is required and the supporting documents are on another claim, it is important to transfer the documents to the relevant claim. This will ensure the right documents support the recovery decisions for each claim.
To transfer documents from one claim to another:
• Create a bulk print of all documents on the other relevant claim and complete mandatory fields and description
• Open PDF document from email link
• File the PDF away to the relevant claim
• Repeat these steps if there is relevant documents on multiple relevant claims
The PDF should also be renamed something short but relevant, and identify which claim number the information came from, so it is included/printed in further referrals or copy files.
E.g. Medical records and reports from claim: 100XXXXXXXX
Please do not create a bulk print on one claim and then move it to another claim, renaming it and using it in a referral for advice as it will not appear in any file copy subsequently used.

Manage document groups

e Generate a Social Rehabilitation Referral task for Recovery Administration for a 'Communication and Assistive Technology Assessment'. For guidance refer to Referring Tasks to Recovery Administration - Principles.

Creating Manage Referral Tasks - System Steps

Referring Tasks to Recovery Administration - Principles

Contracted Suppliers by Geographic Area of Coverage

NOTE **What information do you need to include in the referral task/e- form?**
Refer to the "Manage Referral Task Template" below (page 36 for Communication and Assistive Technology assessment).

Manage Referral Task Templates

NG GUIDELINES Purchase Order Details - Communication Assistive Technology Assessment

NOTE **What if the request is urgent and needs to be completed that day?**
• Call Recovery Administration
• Give the Recovery Administrator who answers the call the claim number
• The Recovery Administrator will open the claim in Eos and find the task on the claim
• Transfer the task into the Recovery Administrator's name. This will move it to their personal Eos queue and stop it from being reallocated by Salesforce.

NOTE **What if the request is required in the future?**
If the request is required in the future, set a reminder task for the future date when the service will be required. When the reminder task comes up send a task to Recovery Administration to continue with the process. Consider the contract timeframes and SLAs as specified in the service page

NOTE **What are the SLAs?**
The referral tasks route to the Administration team with an SLA of 24 hours.

f Complete all the mandatory fields and any additional information to be included in the referral form by Recovery Administration. Include questions received via written guidance or hotline advice from Recovery Support, and the standard questions supporting the reason for the referral or assessment request.

NOTE **What if your client has a Care indicator?**
You need to clearly outline this in the e-form.

Refer to Disclosure of Care Indicator Information to Third Parties Policy for more information on how information is disclosed.

Disclosure of Care Indicator Information to Third Parties Policy

4.0 Review task

Recovery Administrator

a Following the task assignment in Salesforce, navigate to Eos and select 'Do Task' from your task queue.

b Review the task to ensure it has all the information you need to proceed.

NOTE **What if you don't have all the information you need?**
If required information is missing from the task, or you need guidance on working within the Administration Team, refer to NG PRINCIPLES Working in the Administration Team.

Principles of Working in the Administration Team

5.0 Create and approve purchase order

Recovery Administrator

a In Eos, generate a Purchase Order for the specified referral.

Creating purchase orders using general + QE

NG GUIDELINES Purchase Order Details - Communication Assistive Technology Assessment

Service codes.pdf

Purchase Order - Handy Hints on how to create and edit POs

b Identify and select the vendor as specified by the Recovery Team Member.

NOTE **What if a vendor has not been specified?**
If no vendor has been specified, select an appropriate contracted vendor for the referral type and client's geographic area.

c Locate the contracted vendor via the Geographic Location search, once selected add the vendor as a 'Vendor - Contracted' participant in Eos.

Contracted Suppliers by Geographic Area of Coverage

d Approve the Purchase Order.

NOTE **What if the purchase order requires a higher delegation?**
Refer to the system steps below.

Request Authorisation for a Purchase Order - System Steps

NOTE **What if you get a limited payment error message when authorising the purchase order?**
If you have received a request to amend a purchase order or create a purchase order for client reimbursements, change the limited payment indicator.

1). In Eos, go to the 'Validations' tab, select 'Edit' and update the Limited Payment List Indicator to 'No'.
2). Select 'OK'.
3). Go back to the purchase order to authorise.

Once you have authorised the purchase order and notified the vendor please remember to change the Limited Payment List Indicator to 'Yes'.

6.0 Create and send referral documents

Recovery Administrator

a In Eos, create the referral for Communication and Assistive Technology Assessment.

ACC081 Social rehabilitation assessment referral-vendor

b Populate with any extra information noted on the referral task. Ensure you have checked that all the relevant information within the task has been captured.

NOTE **What does a quality referral look like?**
Refer to Admin Template - Communication Assistive Technology Assessment.

Admin Template - Communication Assistive Technology Assessment

c Ensure you have completed the document (to convert the document into a non-editable pdf).

d Link the referral to the document group 'Communication and Assistive Technology Assessment'.

e Perform privacy checks using NG SUPPORTING INFORMATION Inbound and Outbound Document Checks.

NG SUPPORTING INFORMATION Inbound and Outbound Document Checks

f Create email using the Requests and referrals template, attach the referral and documents from group and select the most appropriate email address (commonly listed under General Purchasing).

NGCM - FINAL Emailing from Eos using a Template - System Steps

g Send the referral to the vendor.

NOTE **What if the Vendor requires the documents to be sent via courier?**
Go to Prepare and Send Client Information by Courier process.

PROCESS Prepare and Send Client Information by Courier

h In Salesforce, close the assigned referral task.

7.0 Determine next steps once assessment report is received

Recovery Assistant, Recovery Coordinator, Recovery Partner

a Receive notification that the vendor has accepted the referral.

NOTE **What if the provider is unable to accept the referral?**
If the provider is unable to accept the referral, then resubmit the request with a new provider.

b Create an action to remind the client of the appointment.

NOTE **What if the client fails to attend the appointment?**
If the client fails to attend the appointment or take part in the activities, you should find out why.
In some cases you may need to decline their entitlement.

Decline Entitlement When Client is Non-compliant Policy

c Receive notification that the CATA initial Assessment or the CATA initial Assessment Report has been received and is attached to the claim.

d Perform privacy and relevancy checks on the initial Assessment or initial Assessment Report.

NG SUPPORTING INFORMATION Inbound and Outbound Document Checks

e Check the quality of the report.

NOTE **What if the Assessment Report is not of an appropriate standard?**
Request further information and discuss the information lacking with the assessor. If the initial assessment report was unsatisfactory, assessors must resubmit the report at no extra cost to ACC.

NOTE **What if the quality of the report(s) is still unsatisfactory?**
Contact the local Engagement and Performance Manager if there are ongoing issues with the quality of a Provider's reports.

f Review the initial Assessment or initial Assessment Report and advise the service provider that Assessment and Trials for CATA have been approved.

NOTE **What if the assessor is requesting additional service codes?**
Create and send a 'NGCM - Edit Manage Referral Purchase Order' Task to Recovery Administration see service schedule.

Communication and Assistive Technology Assessment Services (CATA) Service Schedule

NOTE **What if you need additional information to make a decision to approve the services recommended?**

PROCESS Seek Internal Guidance

g Decide level of support needed to meet the client's injury-related condition.

Do You Have Delegation to Approve Supports?

Recovery Assistant, Recovery Coordinator, Recovery Partner

YES.... Continue

NO.... NEXT ACTIVITY

8.0 Request Approval

Recovery Assistant, Recovery Coordinator, Recovery Partner

a Send approval request to the appropriate approver.

9.0 Approve Social Supports

Recovery Assistant, Recovery Coordinator, Recovery Partner

a Contact the client and confirm you are speaking with the right person by asking ACC's identity check questions.

Identity Check Policy

b Discuss report and next steps with client.

c Notify the client of the potential wait period if a trial of equipment is required.

d In Salesforce, add a contact note as a record of the conversation.

e If required, provide a copy of the report to the client and key stakeholders, as per their preferred contact method.

NGCM - FINAL Emailing from Eos - System Steps

NOTE **What if the client requests that the report is changed or incorrect?**
A client can request that information held by ACC is changed or updated if it is factually incorrect (ie: wrong DOB, incorrect name spelling etc). If it is the opinion of an assessor or provider, the client can supply a 'statement of correction' to ACC which is then included with the report. This means that any time the report is sent out, the statement of correction must be sent as well.

Refer to Managing a client's request to change personal information.

Managing a client's request to change personal information

f Update the Recovery Plan.

g Approve the supports recommended by the Assessor and set up the support.

PROCESS **Create or Update Recovery Plan**
Recovery Assistant, Recovery Coordinator, Recovery Partner

PROCESS **Assess and Fund Managed Rehabilitation (MRES) Equipment**
Recovery Assistant, Recovery Coordinator, Recovery Partner