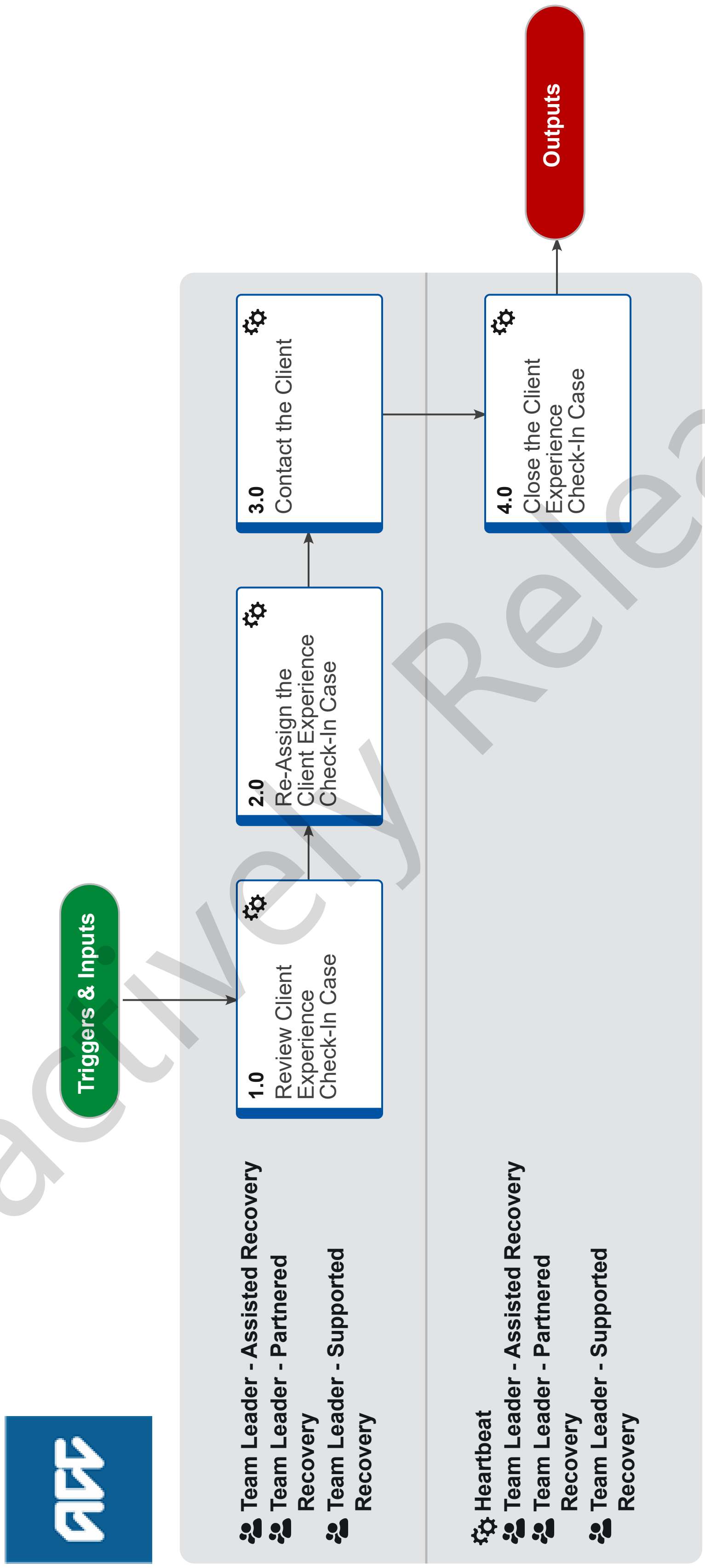
Complete a Client Experience Check-In v9.0



Complete a Client Experience Check-In v9.0

Summary

Objective
A comprehensive end-to-end process for conducting a Client Experience Check-In, including:

- Logging in to Heartbeat;
- Reviewing the Client Experience Check-in case;
- Preparing for the call;
- Contacting the client and
- Closing the Client Experience Check-In case

It also provides for the scenario in which the Client Experience Check-in needs to be transferred to (and completed by) a different Team Leader.

Background
Analysis of past complaints shows that we can often predict when a client's experience with ACC might be going off track and they might need additional communication or support. The Client Experience Check-in aims to improve customer experiences and reduce the number of escalations and complaints received, through proactive communication with selected clients.

The predictive model that sits in behind the Client Experience Check-in identifies complex patterns in operational data, allowing us to identify people most likely to need communication or support at a given time. Not everyone will have issues, but they may well appreciate the call and feel that they are being listened to - that we care. Similarly, we won't catch everyone who needs support, but we will continue to improve the model over time.

There are some clients who will automatically be excluded from a client experience check-in:

- Those with an active review
- Those with a current remote/care indicator
- Those with any history of aggression

Owner Name Withheld

Expert Name Withheld

Procedure

1.0 Review Client Experience Check-In Case

Team Leader - Assisted Recovery, Team Leader - Partnered Recovery, Team Leader - Supported Recovery

a Receive the notification that you have a new Client Experience Check-In case waiting for you in Heartbeat.

NOTE How does Heartbeat generate Client Experience Check-In cases?
The analytical model identifies the clients we need to complete a Client Experience Check-in with. The data is uploaded to Heartbeat and Client Experience Check-In cases are generated and allocated to Team Leaders. An email notification is sent out to inform you that you have a new Client Experience Check-In case to action in Heartbeat. Client Experience Check-In cases need to be responded to within 3 working days, with an eye to closing them within 10 working days.

NOTE Why are clients selected for a Client Experience Check in?
The analytical model looks for similar patterns within historical complaints data and managed or recently managed claims so we can reach out to clients to provide additional support proactively before potential complaints are made. Some examples of why clients are selected by the analytical model include:
•ACC departments last contacted
•Numbers of emails logged in EOS by a third-party (e.g. specialist)}
•Payment and service indications (social rehab payments, independence assessments)
•Number of declines in a prior period
•Indication of gradual process type injury
•Numbers of documents received in last month, 6 months, 12 months
•Time since last contact
•Prior complaints, reviews and dissatisfaction indications in contacts
•Type of claim (sensitive claim, serious injury, fund)
•Last provider visited

b Log in to Heartbeat to access your Client Experience Check-in case

Heartbeat (Single Sign On Link)

NOTE What if you can't access Heartbeat?
Refer to the 'How to request Heartbeat access' link below. If you still can't login after following these instructions, please contact the Service Desk and log a ticket.

How to request Heartbeat access

NOTE How do you use Heartbeat?
Refer to the GROW modules in the Heartbeat Learning Portal.

Find out more information about Heartbeat and the Client Experience Check-in by visiting the Heartbeat Te Pātaka Site

Heartbeat Te Pātaka site

Heartbeat - Learning Portal (GROW@ACC)

c Prepare yourself before opening the Client Experience Check-In case.

Ask yourself the following questions:

- What opportunities are there?
- What can I learn?
- What can others learn?

d Review the Client Experience Check-In case

e Review the client's journey to date in the relevant systems to understand their experience

NOTE **What things should you review as a part of this?**

Review relevant areas of Eos and Salesforce (contacts, documents, feedback, life areas, reviews, decisions)

Look for deceased indicators on claims. The analytical model should exclude these claims, in the event that it doesn't, Client Experience Check-Ins shouldn't be conducted.

Consult with anyone currently managing one of the client's claims or previously been involved in their claims.

• Advise that you're contacting the customer to complete a Client Experience Check-in;
• Understand the key points of the client's experience
• Maintain the integrity of any existing relationships with the client.

NOTE **What if you don't think the client should be contacted?**

Discuss this with your Client Service Leader (CSL) to determine if it's appropriate to complete the Client Experience Check-in. Your CSL will use their discretion on whether the client should be contacted or not.

NOTE **Who does the analytical model included/ exclude?**

Excludes:
· Deceased clients
· Clients with a care indicator (ever)
· Clients who were ever managed by Te Ara Tika
· Clients who were last managed by Staff Claims Unit
· Clients who were ever managed by Remote Claims Unit
· Clients who were last managed by TPA. E.g. WorkAon, Gallagher Bassett Care Advantage, WellNZ
Limited and TPA Support
· Moderate to severe TBI. e.g. these are the TBI clients from the standard exclusion
· Clients who currently have a review open (e.g. reviewAppStatus is 'Active')
· Clients who were selected by the client check-in within the last 90 days
· Complaint made in last 2 months
· Clients with a fraud indicator
· Clients under age 16
· Clients who have ever had a ventilator

Vulnerable Client Inclusions:
· Clients who have had a sensitive claim - all claims, three months after lodgement
· Clients who have had a serious injury - 4 months from lodgement
· Clients who have a history of self-harm - 1 year after claims are lodged with the wilful self-harm indicator

f If you're prepared to contact the client, proceed to activity 3.0: Contact the Client. Otherwise, continue to the next activity

NOTE **Why do we contact clients with closed claims or claims in actioned cases?**

Evidence shows that clients with closed claims or claims in actioned cases are more likely to complain. Previous analysis indicates:
•1 in 6 complaints are from clients whose claim has been in 'actioned cases' over 2 months
•More than 10% of complaints are from clients whose claim has been in 'actioned cases' for over 6
months
•A third of complaints are from clients whose claim is in 'actioned cases'

2.0 Re-Assign the Client Experience Check-In Case

Team Leader - Assisted Recovery, Team Leader - Partnered Recovery, Team Leader - Supported Recovery

a Consult your Client Service Leader to determine if it's appropriate to transfer the Client Experience Check-In case to another Team Leader

NOTE **When is it appropriate to transfer a Client Experience Check-In case**

• If there is a higher likelihood of getting it done by reassigning it to a different Team Leader than holding on to it yourself, due to workload, (sick) leave or some other incapacity OR
• If you aren't comfortable or prepared enough to contact the client

b Contact the Team Leader to let them know you'll be transferring the Client Experience Check-In case case to them

c Transfer the case in Heartbeat

NOTE **How do you transfer a Client Experience Check-In case in Heartbeat?**

Open the Client Experience Check-In case and select the dropdown box with the current case owner's name. A search option will display where you can type the person's name you wish to transfer the client check-in case to. More information around navigating and using Heartbeat can be found in the GROW modules in the Heartbeat Learning Portal.

Heartbeat - Learning Portal (GROW@ACC)

NOTE **What if the Team Leader you are trying to transfer the Client Experience Check-In case to doesn't have access to Heartbeat?**

Transfer the Client Experience Check-In case to Jarryd Beadle in the Heartbeat Feedback Team. He will then manually transfer this for you. Make sure you add notes to the case form with who this needs to be transferred to and why.

3.0 Contact the Client

Team Leader - Assisted Recovery, Team Leader - Partnered Recovery, Team Leader - Supported Recovery

a Consider if you need a plan, prior to contacting the client

NOTE **What if you need support to complete the Client Experience Check-In case?**

You should consider if you're in the right frame of mind to be contacting the client. Although client contact is quite a common occurrence, proactive contact can, at times, be challenging:

• When receiving a Client Experience Check-In case, aim to apply a 'growth mindset' and avoid assumptions when talking to the client.
• Take note of your emotions and allow yourself time to process what they are telling you.

If you need additional support with (or guidance about) a Client Experience Check-in, discuss this with your Client Service Leader.

NOTE **When should you involve the Customer Resolutions team or Alternative Dispute Resolution (ADR)?**

You can involve the Customer Resolution team if:
• You need support;
• They're already managing a customer complaint from the client OR
• The client has made a complaint under the Code of ACC Claimant's Rights

You can involve Alternative Dispute Resolution (ADR) to help resolve disputes and rebuild trust where this might be lost with our customers. It is an informal process where the people in the dispute are actively involved in trying to find a resolution. Conciliators are independent of ACC and have significant legal experienced in resolving disputes between injured customers and ACC. They use this experience to reach an understanding of each party's perspective and possible ways to resolve issues.

Alternative Dispute Resolutions(ADR)

b Prioritise responding to the client

NOTE **How can you assess the priority of a Client Experience Check-In case?**

When you first receive the Client Experience Check-In case, consider: is it nearing the 3 working day service level agreement timeframe to respond? It's important to consider the priority of responding to a Client Experience Check-In case alongside your other work.

c Change the Heartbeat Client Experience Check-In case status to 'In Progress' when you contact the the client

d Call the client

Client Experience Check-in Conversation and Email Guide

Customer Resolutions

NOTE **How should the phone call be conducted?**

The approach to the call will depend on the context/history of any claims the client has. Generally speaking, you should introduce the discussion as a courtesy call aimed at checking in with the client to understand how their experience is going or how their past experience went. The exception to this is if there's an obvious reason the client might be dissatisfied, in which case you can call with a purpose (or at least provide one).

Focus on the client as opposed to any claims and look to understand their experience in more detail by applying the LAST (Listen, Apologise, Solve and Thank) approach to the conversation.

If it's appropriate to do so, offer another check-in at a later date.

Use the conversation and email guide to help support you with what to say and ask the client.

NOTE **Can I email the client?**

Contact the client by email to offer a Client Experience Check-in when:

•You are unable to reach the client by phone (2x attempts completed)
•Engaging with a client who would like email communication only
•Engaging with a client who would like email communication prior a call

NOTE **What if you can't reach the client?**

If you cannot get a hold of a customer on the first call attempt, attempt another call within 3 working days.

If you are unable to reach the customer, you may leave a voicemail requesting a call back:

"Hi, it's [Your Name] from ACC here. Can you please call me back on [Direct Dial] to talk? I'm here from [Working Hours], [Working Days]."

Do not leave a voicemail if you cannot verify the identity of the client through their voicemail message.

If you do not hear back from the customer after two attempts, you can email them (if they have a valid email on file) offering a Client Experience Check-in. Use the conversation and email guide to help support you with what to say and ask the client.

Record your attempts in both the Client Experience Check-In case form and Eos/Salesforce, then change the Client Experience Check-in case status to 'closed'

e Listen to the client and take the appropriate action

LAST approach.pdf

NOTE What if I've identified further action/support is required?
It may be the case that you're able to resolve some or all of the client's concerns, either on the call or immediately/shortly afterwards. Ensure the client is aware (if they still have a active claim) that you won't be getting involved in the day-to-day management of their claim - this will remain with the Recovery team member who has been responsible for managing their claim. Be clear on the actions that will take place and what your role in these actions will be. Finally, make sure the client understands the feedback they've been given.

If you need to, delegate any post-call actions to another team member. Check in with them regularly to ensure the work has been completed in an appropriate timeframe.

NOTE What if the client presents a threat to you or to themselves?
If the client presents a threat to themselves, refer to the 'Respond to Threats of Self Harm by a Client' process.

If the client presents a threat to you, attempt to de-escalate the situation. If you identify a need for additional support during the call, consider reaching out to the Customer Resolutions team or engaging Alternative Dispute Resolution.

If you require any post-call support following a conversation with a hostile client, consider speaking with your Client Service Leader or, as required, engaging the services of the Employee Assistance Program (EAP).

PROCESS Respond to Threats of Self Harm by a Client

NOTE Is it appropriate to complete a Client Experience Check-in with a Authority to Act (ATA)?
Yes, if there is a ATA for a client we should contact them to complete the client experience check-in.

4.0 Close the Client Experience Check-In Case

Heartbeat, Team Leader - Assisted Recovery, Team Leader - Partnered Recovery, Team Leader - Supported Recovery

a Record your conversation and actions in the Client Experience Check-In case form and in Eos/ Salesforce

NOTE How do you record your actions in the Client Experience Check-In case form?
Refer to the GROW modules in the Heartbeat Learning Portal which can be found below.

Heartbeat - Learning Portal (GROW@ACC)

NOTE Why do you need to record my actions?
It is important Client Experience Check-In cases and claims are updated when actions are taken so that other users understand what actions have been completed when reviewing a Client Experience Check-In case or claims, especially if:

• Someone is on leave;
• The Client Experience Check-In case is re-assigned to a new owner OR
• The Heartbeat feedback team are completing quality reviews on Client Experience Check-In cases

b Update the Client Experience Check-In case status to 'Closed' and complete the relevant fields in the case form. 'Save' or 'save and exit' before leaving the feedback case form.