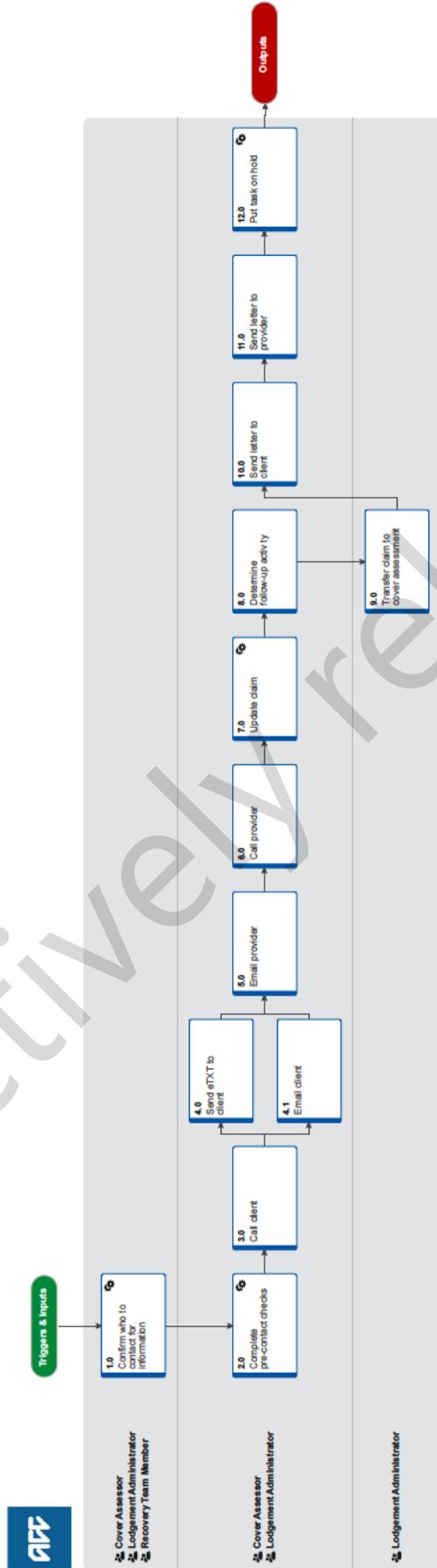


Contact Client or Provider for Information at Lodgement v28.0



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v28.0



Summary

Objective

To contact a client or provider for information about a claim.

Background

Someone needs to contact either the client or provider for information about a claim so that a cover decision can be made.

Owner

Name withheld

Expert

Name withheld

Procedure

1.0 Confirm who to contact for information

Cover Assessor, Lodgement Administrator, Recovery Team Member

- a** Ensure the client is the appropriate person to contact for the information.
In general, it's best to contact the client for personal information and the provider who lodged the claim for medical information.

NOTE **What if the client does not have a recorded phone number, including cell phone number, in Eos?**

Ring the provider for a client contact number. Cell phone numbers are not always visible on ACC45s but can be held by providers.

NOTE **Who can contact the client about request for hernia cover?**

Cover Assessors contact the client and complete ACC6261 Cover assessment - initial call summary - hernia template with the client.

-  ACC6261 Cover Assessment – Questionnaire to client - Hernia

NOTE **What if it's more appropriate to contact the provider?**

Go to task 5.0

NOTE **What if the provider has not signed the ACC45?**

If the ACC45 requires a signature this can not be completed verbally with the provider. Either email the ACC45 to the provider (task 5.0) or send a letter with the ACC45 attached (task 11.0).

2.0 Complete pre-contact checks

Cover Assessor, Lodgement Administrator

- a** Check the client's party record in Eos to make sure it's okay to contact the client.

-  View party details

NOTE **What if the client is under 16 years old?**

- If the client's parent or guardian is listed on the claim, call them instead. Use the instructions in task 3.0 to do this.
- If the client's parent or guardian is not listed on the claim, contact the provider. Go to task 5.0 to do this.

NOTE **What if the client has a care indicator?**

Look up their management plan or speak with a leader or manager before proceeding.

NOTE **What if the client has a safe contact?**

Follow the policy on Contacting Sensitive Claims Clients below.

-  Contacting sensitive claims clients Policy

NOTE **What if the client is not well enough to contact, eg they might be unconscious or under heavy medication?**

Contact the provider instead. Go to activity 5.0 to do this.

- b** Check the client has a valid phone number.

NOTE **What if there's no phone number for the client?**

Look at the most recent phone number history to see if there's a recent valid number on file you can call. If there isn't one, call the provider to obtain the client's number.

NOTE **What if the client has an overseas phone number?**

Check if the client has a verified email address.

- If they do, then request the information via email. Go to task 4.1 to do this.
- If they don't then contact the provider. Go to activity 5.0 to do this.

3.0 Call client

Cover Assessor, Lodgement Administrator

- a** Call the client and complete a security check to ensure you're talking to the correct person. Attempt a call to all numbers listed on their party until you speak with them, ie. home, work and cell phone

NOTE **What are the security check questions?**

See 'Identity Check Policy' below for the standard security questions

-  Identity Check Policy

NOTE **What if the client refuses to answer the security questions or doesn't believe you're from ACC?**

You can:

- Give the client their provider's name to reassure them you're from ACC
- Suggest the client calls you back on your work number – 0800 101 996 [your extension]

NOTE What if you've tried to call the client and still can't contact them?

If it's a cell phone number and either:

- the voicemail states and matches the client's first name,
- there is no voice mail identifying any name, or
- if it's a home or work phone number and the voicemail states the client's first AND last name, then:

- Leave a voice message to call you back. Don't leave any information about the reason for the call or the claim number, simply say: "Hi it's [your first name] from ACC, please call me back on 0800 101 996 [your extension]. We're available from 7am to 7pm weekdays. Thank you."

- If there's a cell phone number, go to activity 4.0 to send an eTXT, and
- If there's a verified email address, go to task 4.1 to send an email.

Make a contact using the Contact Generator template to record the call attempt.

- b** Request the information you need. Go to activity 7.0

 Sending eTxts

4.0 Send eTXT to client

Cover Assessor, Lodgement Administrator

- a** If necessary, review the eTXT Policy and Use information on Te Pātaka by following the link below.

 Etxt Policy

- b** Send an eTXT to the client saying:
Hi [Client], we've received your claim and need more details. Please ring ACC on 0800 101 996 ext [your extension/hunt group]. We are available from 7am to 7pm weekdays. Thank you

Replies cost up to 27c

 Creating and sending eTxts

NOTE Can you name the client in the eTXT?

If the mobile number is verified the clients first name can be used. If the mobile number isn't verified the clients name is not to be stated in the eTXT.

- c** Go to activity 7.0

4.1 Email client

Cover Assessor, Lodgement Administrator

- a** If necessary, review the Email Policies by following the links below.

 Email Policies

- b** Email the client requesting the information that you need.

- c** Go to activity 7.0

5.0 Email provider

Cover Assessor, Lodgement Administrator

- a** Check that the provider's email address is a general one for the practice or for the individual provider at that practice. See the Verifying and Re-Verifying an Existing Vendor, Provider or Facility Work Email Address process below if necessary.

 Verify an Existing Provider, Vendor or Facility Email Address

NOTE What if you don't have the email address I need?

Call the provider instead. Go to activity 6.0 to do this.

- b** Email the provider to request the information that you need.

NOTE What if the provider doesn't want to email the information?

If the provider is happy to confirm the information over the phone, then call them directly. Go to activity 6.0 to do this. Otherwise ask for provider to send the information in writing.

- c** Go to activity 7.0

6.0 Call provider

Cover Assessor, Lodgement Administrator

- a** Call the provider and request the information that you need. If necessary give them the client's NHI number and/or the ACC45 Number.

NOTE What if the provider doesn't want to provide information over the phone?

Depending on what you're requesting either:

- ask the provider to email the information or send it in writing, then go to task 7.0
- send the provider the appropriate letter requesting the information. Go to task 10.0 to do this.

7.0 Update claim

Cover Assessor, Lodgement Administrator

- a** Update the claim with the information you've received (if applicable).

- b** Add a contact in Eos stating the action you've taken.

 Add a client contact

- c** If you've contacted the client or provider and confirmed the information you need, this process ends.

NOTE What if you haven't confirmed the information you need?

Go to task 8.0

8.0 Determine follow-up activity

Cover Assessor, Lodgement Administrator

- a** If appropriate, try contacting an alternative person for the information (e.g. if you've tried contacting the client, try the provider instead). Go back to task 1.0 to do this.

NOTE What if it's not appropriate to contact another person?

Go to task b below.

NOTE What if you've tried contacting all appropriate people but haven't been successful?

Go to task b below.

- b** Ensure that two attempts have been made to contact the relevant person (or people) by phone/eTXT/email.

NOTE What if only one attempt has been made?

Go to activity 12.0 to put the task on hold. When the task is released from hold a second attempt must be made to contact the person by phone/eTXT/email.

- c** If you're a Lodgement Administrator, go to activity 9.0 to transfer the claim before generating the appropriate letter.

NOTE What if I'm not a Lodgement Administrator?

Go to activity 10.0 to send a letter to the client or activity 11.0 to send a letter to the provider.

9.0 Transfer claim to cover assessment

Lodgement Administrator

- a** Remove the lodging provider ID from the claim and add the default provider ID J99966. This will ensure the claim is given a Held status.
- b** Add any other default information required to bypass the mandatory data fields.
- c** Click NEXT on the claim intake form to save the changes.
- d** Close the Missing Information for Cover task, this will trigger the claim to re-run validations and be sent to the Cover Decision Service where it will be given a Held status.
- e** Open the claim.
- f** Remove default information that you added and replace with information received on the claim form.
- g** If you're sending a letter to the client, go to activity 10.0.

NOTE What if you're sending a letter to the provider?

Go to activity 11.0.

10.0 Send letter to client

Cover Assessor, Lodgement Administrator

- a** Ensure the client has a valid postal address.

NOTE What if the client's address is invalid?

- If the address is verified but invalid, it's okay to send a letter.
- If the address is not verified and invalid, then do not send a letter.
- If the claim is to clarify Residency Criteria send eTXT to client if cell number is available (see activity 4.0) and add questions into contact using the Contact Header Generator.

If not able to send letter or eTXT the client, the claim may need to be declined due to a lack of information. Follow the Decline Claim process below to do this or talk to your manager if you're unsure whether this is appropriate. If you don't have delegation to decline the claim then transfer it to the appropriate queue to be declined.

 **PROCESS** Decline Claim

- b** Generate the appropriate letter to the client requesting the information that you need ensuring that that date it is required by is not a weekend or statutory holiday.

NOTE Which letter should you generate?

- CVR01 if requesting missing information on the claim form
- CVR06 questionnaire to determine whether the injury is work-related
- CVR08 questionnaire to determine what activity the client was undertaking when they were injured
- CVR09 for further information on a late lodged claim
- CM04 if you want to advise the client that you were unable to reach the client by phone.

 CVR01 ACC45 information request - claimant

-  CVR06 ACC121 Pack - Work injury questionnaire request – client
-  CVR08 Activity questionnaire request - claimant
-  CVR09 Late lodgment info request - claimant
-  CM04 Advise claimant that you were unable to reach them by phone

NOTE What if you're a Lodgement Administrator and you're sending a letter for a PICBA claim?

If you're unlikely to receive a response before the cover decision due date, then extend the due date. Go to the Extend Cover Decision Timeframe process below to do this. Include the CVR30 timeframe extension along with the letter requesting the outstanding information to the client.

 **PROCESS** Extend Cover Decision Timeframe

NOTE What if you're a Lodgement Administrator and you're sending a letter for a specialist claim?

Contact the specialist team to explain the action you've taken on the claim. Alert them if the cover decision due date is close to being reached so that they can extend the timeframe if necessary. This process ends.

- c** Complete a privacy check to ensure you are only sending information to the client that is relevant to this claim.

NOTE Do you have to complete the privacy check myself?

In some business units a separate team will complete this privacy check. Ask your manager if this is the case for your team. If there is not a separate team responsible for privacy checking you will need to complete the check yourself.

- d** Send the letter to the client.
- e** Go to task 12.0

11.0 Send letter to provider

Cover Assessor, Lodgement Administrator

- a** Generate the appropriate letter to the provider requesting the information that you need.

NOTE Which letter should you generate?

- CVR02 if request is for missing information on the claim form
- CVR03 if request for missing diagnosis when Z-code has been used on claim form
- MD09A if request for consultation notes (hernias).

-  CVR02 ACC45 information request - vendor
-  CVR03 ACC45 diagnosis request - vendor
-  MD09a Further info – consultation notes – vendor

NOTE What if you're a Lodgement Administrator and you're sending a letter for a PICBA claim?

If you're unlikely to receive a response before the cover decision due date, then extend the due date. Go to Extend Cover Decision Timeframe process.

 **PROCESS** Extend Cover Decision Timeframe

NOTE What if you're a Lodgement Administrator and you're sending a letter for a specialist claim?

Check if the cover decision due date is within the next 2 days. If it is then contact the specialist team to explain the action you've taken on the claim and alert them of the pending cover decision due date so that they can extend the time-frame if necessary. This process ends.

- b** Complete a privacy check to ensure you are only sending information to the provider that is relevant to this claim.

NOTE Do you have to complete the privacy check myself?

In some business units a separate team will complete this privacy check. Ask your manager if this is the case for your team. If there is not a separate team responsible for privacy checking you will need to complete the check yourself.

- c** Send the letter to the provider.

12.0 Put task on hold

Cover Assessor, Lodgement Administrator

- a** In Eos, edit the Missing Information for Cover or Confirm Cover Decision task to add today's date, and in the description field add any action you've taken.
- b** Put the task on hold by editing the target and hold dates, and set priority to "high".

NOTE How long should you put the task on hold for?

- if you're waiting for a response to a phone call, text message or email, update the target and hold dates to 2 days from the date of your call
- If you're waiting for a response to a letter, extend the target and hold dates by 14 days
- If the new target date will be beyond the date the cover decision is due, insert the extension paragraph into the letter and amend the target and hold date to the appropriate new target date. The extension paragraph can be found here: W:\Public\RAWC\REG Cover Clarification team\CC Blurbs

 Edit a task

- c** If it's a Missing Information for Cover task, transfer task to the Registration Centre - Information Required queue.

NOTE What if it's not a Missing Information for Cover task?

Ensure the claim and task are in the appropriate queue for the held claim to be managed:

- If the claim is PICBA and hasn't been allocated to a cover assessor yet, transfer the claim to the Registration Centre - Low Complex Cover queue (the Confirm Cover Decision task will follow the claim).
- If you're managing the claim, leave the claim and task in your own queue.