

Summary

Objective

To initiate and deliver a new Health Service.

Background

Recovery Services manages contracts and relationships with service providers. This includes managing the design and delivery of new services and reviewing service providers' performance. Recovery Services work with providers to develop the best possible treatment and rehabilitation services for our clients. The work is underpinned by the Health Sector Strategy and Service Plans which aims to partner with providers to deliver the right outcomes for clients.

Owner

Name withheld

Expert

Name withheld

Procedure

1.0 Review information

Portfolio Advisor, Portfolio Manager

- a** Analyse information to evaluate service opportunities.

NOTE Where can you source information from?

- InFact (Individual Supplier and Service specific Dashboards)
- Monthly financials
- Te Kapehu Whetu
- Service review/evaluation
- Service stream meetings
- Supplier meetings
- Sector feedback
- Engagement & Performance Manager (EPM) feedback
- Recovery Team Member focus group feedback
- Knowledge & Capability Team
- Technical Services Team feedback
- Clinical evidence
- Clinical Services Team feedback
- Pricing Team
- Finance Team
- Health Sector Bodies ie Manuta Hauora, Te Whatu Ora
- Professional body feedback
- Internet searches
- Policy Team
- Voice of Customer team
- ACC Research Team
- Information Management Team
- Manager Recovery Services
- Health Partnerships Leadership Team (HPLT)
- Chief Executive Office.

NOTE What if you require more specific data?

Send a detailed work request to Analytics & Reporting (A&R) including:

- Client demographics
- PO creation trends
- Client volume/costs 5-10 years
- Supplier trends (spend/volume/cost per claim).

- b** Consult your Portfolio Manager on the analysis and obtain a decision to propose a new service.

NOTE What if further analysis is requested?

Obtain further information as directed, update the Portfolio Manager and obtain decision to propose a new service.

NOTE What if the decision is to decline?

Follow the direction of the Portfolio Manager, continue to collect data or pause the review.

The process ends.

NOTE What if decision is for a variation to an existing service?

Go to Deliver a Health Service Contract Variation process.

PROCESS Deliver a Health Service Contract Variation

NOTE What if decision results in a return to market?

Go to Deliver a Tender process.

PROCESS Deliver a Tender

- c** Send analysis and Portfolio Manager approval to the Health Contracts Governance Group (HCGG) for endorsement to proceed.

NOTE What if endorsement is not obtained?

Follow the direction of the HCGG, continue to collect data or pause the review.

The process ends.

NOTE What if proposed new service aligns with the Health Sector Strategy (HSS) or Health Outcome Framework (HOFW)?

Submit a proposal to the Turuturu a Hauora Agile Release Train via the Keeping the HART pumping link below or contact the Product Manager to discuss.

If accepted by the Turuturu a Hauora Agile Release Train, the process ends.

Keeping the HART pumping

2.0 Create project plan

Portfolio Advisor, Portfolio Manager

- a** Receive endorsement from HCGG.

- b** Create a project plan to document the proposed new service.

NOTE What needs to be included in the project plan?


- Link to Huakina Te Ra/identify strategic alignment/context
- Review existing service provision/proposed changes
- Pricing/whole of life cost (WOLC)/ outstanding claim liability (OCL)
- Actuarial statement
- Pricing
- Cost/benefit (Spend forecast/all spend/project cost/key cost drivers/supply positioning matrix)
- Risk/mitigations
- Implementation timelines
- Impact on other services/clients need
- Stakeholder identification and management
- Sector collaboration/partnering
- Comms plan
- Delegated approval.

NOTE What if you need to obtain additional market analysis?

Consider the following:

- Status (international/domestic)
- Service impact
- Direct heading
- Number of suppliers/market share
- Completion
- Size, capability, capacity
- Quality supply chain
- Alternatives
- Our value to supply
- Risk assessment.

- c** Determine the appropriate level of delegation that will be required to approve the new service.

 Corporate Delegations Framework - Principles, Policy and Others

NOTE What if the approval delegation is at the Board level?

1. Contact the Governance Team (Governance@acc.co.nz) to determine if Board approval is required, for further information refer to the Governance Hub link below
2. Request Governance Team to book appropriate appointments into the board meeting schedule
3. Seek confirmation from Governance Team that the approval is booked as an item on an upcoming Board agenda.

 Governance Hub

- d** Connect with internal stakeholders including Procurement and Pricing early to work on proposal impacts.

NOTE Which teams do you need to connect with?

- Service Delivery - Recovery Team Members (RTM), Client Service Leaders (CSL), Principal Advisors, Knowledge & Capability Team, Performance Team, Payments Team, Client Recovery
- Health Partnerships - Health Procurement Team Specialists, Maori Health Team, Provider Invoice Team, Clinical Services, Engagement & Performance Team, Accredited Employer Programme (AEP) Team
- Performance & Intelligence - Analytics & Reporting (A&R), Pricing Team Analysts
- Business Capability/Process - Business Process Improvement (BPI)
- Comms - Change and Communication plan for staff and suppliers
- Learning & Development Team
- Process Manager - Process owners and experts.

3.0 Engage stakeholders in design of new service

Portfolio Advisor, Portfolio Manager

- a** Engage with stakeholders to collaborate/partner in the design of the new service.

NOTE Who are stakeholders?

Internal

- Service Delivery - Recovery Team Members (RTM), Client Service Leaders (CSL), Principal Advisors, Knowledge & Capability Team, Performance Team, Payments Team, Client Recovery
- Health Partnerships - Health Procurement Team Specialists, Maori Health Team, Provider Invoice Team, Clinical Services, Engagement & Performance Team, Accredited Employer Programme (AEP) Team
- Performance & Intelligence - Analytics & Reporting (A&R), Pricing Team Analysts
- Business Capability/Process - Business Process Improvement (BPI)
- Learning & Development Team
- Finance Team.

External

- Suppliers
- Professional bodies - ie Universities, data collection agencies (AROC Australian Rehabilitation Outcome Centre)
- Other government agencies - national/international.

- b** Document a summary of the proposed changes (current state/future state the design of new service) in the project plan.
- c** Share the summary of changes with appropriate stakeholders and request feedback.
- d** Contact the Pricing Team Analyst to finalise WOLC estimation for the proposed changes. Ensure that actuarial advice has been sought.

NOTE What if you need budget advice?

Contact a Finance Business Partner.

4.0 Obtain approval

Portfolio Advisor, Portfolio Manager

- a** Create a memo outlining the proposed new service proposal and its benefits.

 ACC A4 Memo template

NOTE What key headings/information are required?

- Links to Huakina Te Ra
- Description of new service
- Pricing/whole of life cost (WOLC)/ outstanding claim liability (OCL)
- Cost/benefit
- Risk/mitigations
- Implementation timelines
- Impact on other services/clients
- Comms plan
- Endorsements.

NOTE What if approval is at Board level?

1. Portfolio Manager/Principal Advisor draft the Board Paper, using either the template for a full Board paper, or the cover sheet (if presenting a separate report/presentation), refer to the Governance Hub link below
2. Liaise with the Governance Team to confirm key dates for Board Meetings
2. Incorporate feedback into Board Paper
3. Obtain Head of Health Partnerships sign off prior to Board meeting
4. Attend Deputy Chief Executive Prevention & Partnerships (DCE P&P) meeting
5. Receive feedback from other DCE's and Chief Executive (CE) offices and update the Board Paper as required
6. Submit finalised Board Paper to the Exec Page Turn
7. Create talking points for DCE P&P/Head of Health Partnerships for the Exec Page Turn
8. Board meeting takes place
9. Receive approval/feedback and direction from the Board.

 Governance Hub

- b Finalise memo with the Portfolio Manager.
- c Socialise the finalised memo with the Manager of Recovery Services.
- d Attend the appropriate delegated level meeting for approval.

NOTE What if further information is requested?

Follow the guidance and obtain the required information, return to the appropriate meeting for delegated level of approval or arrange a meeting with relevant members of HCGG.

5.0 Update project plan for implementation

Portfolio Advisor, Portfolio Manager

- a Update the project plan for implementation.

NOTE What additional items must you consider in the implementation plan?

- Amendments to Service Schedule
- Amendments to Operational Guidelines
- Taxonomy for service item changes
- Payment processing team - guidance on staff instructions
- Business Process Improvement - Forms, Letters, Information Sheets (FLIS)/processes changes
- Inbound Document Management team - inbound document requirements
- Client Administration - referral requirements
- Delegations changes
- Pilot phase plan (if required)
- Transition plan - change of service items
- Training plan - internal/external
- Change and Communication plan.

- b Share updated project plan with Portfolio Manager to approve the implementation plan.

NOTE What if changes are identified?

Incorporate the feedback into the implementation plan, where appropriate.

- c Draft the proposed Service Schedule and send to Legal for endorsement.

NOTE How do you obtain a Legal review?

1. Email Legal Manager - Commercial
2. Discuss any wording issues with a Solicitor, if required
3. Receive Legal endorsement in writing (ensure Legal endorsement is received prior to seeking approval from the appropriate delegated authority).
4. Finalise the Service Schedule.


6.0 Handover Service Schedule to Procurement

Portfolio Advisor, Portfolio Manager

- a Send the finalised Service Schedule, including the approved memo from the appropriate delegated authority, to a Procurement Specialist to commence procurement activities.
- b Receive and review the draft Contract letter from the Procurement Specialist and obtain approval from the Portfolio Manager.

NOTE What if an issue is identified?

Contact the Procurement Specialist to discuss.

- c Notify the Procurement Specialist that the draft Contract letter is approved by the Portfolio Manager.
- d Add the Service Schedule into Te Whariki.
 Te Whariki
- e Ensure the Contract Administration Team sends the finalised Service Schedule document to the Website Team to upload onto the ACC website.

6.1 Action implementation plan

Portfolio Advisor, Portfolio Manager


- a Update the Comms Team so they can finalise a Change and Communication plan for staff and Suppliers.
- b Update Knowledge & Capability Team and Client Recovery so they can finalise a Training Plan, including training material, method and staff to participate in training.
- c Create a Process Manager Service page and update the process pages owners/experts for any process changes, if required.
- d Update other roles/teams for specific changes, where required.

NOTE What other teams may be impacted by the change?

- Taxonomist and Payment Processing Team - service item codes, confirm the processing activities and any transition of Purchase Order on claims.
- Accredited Employer Programme (AEP) Team - update accredited employers.
- Technical Services - approval for a change to delegations, if appropriate, and ensure the delegations document is up to date.
- PART - Eos/Salesforce/MyACC system updates & BPI for complex Process/FLIS changes.
- Client Administration Teams - define any requirements.
- Client Recovery - clarify transition of Purchase Orders for clients, if required.
- Inbound Document Management Team Leader - define any requirements.

- e Create a Operational Guidelines document and share with the Portfolio Manager for approval.

- f Add approved Operational Guideline document in Te Whariki and send to the Website Team to upload the document onto the ACC website.

 Te Whariki

Proactively released