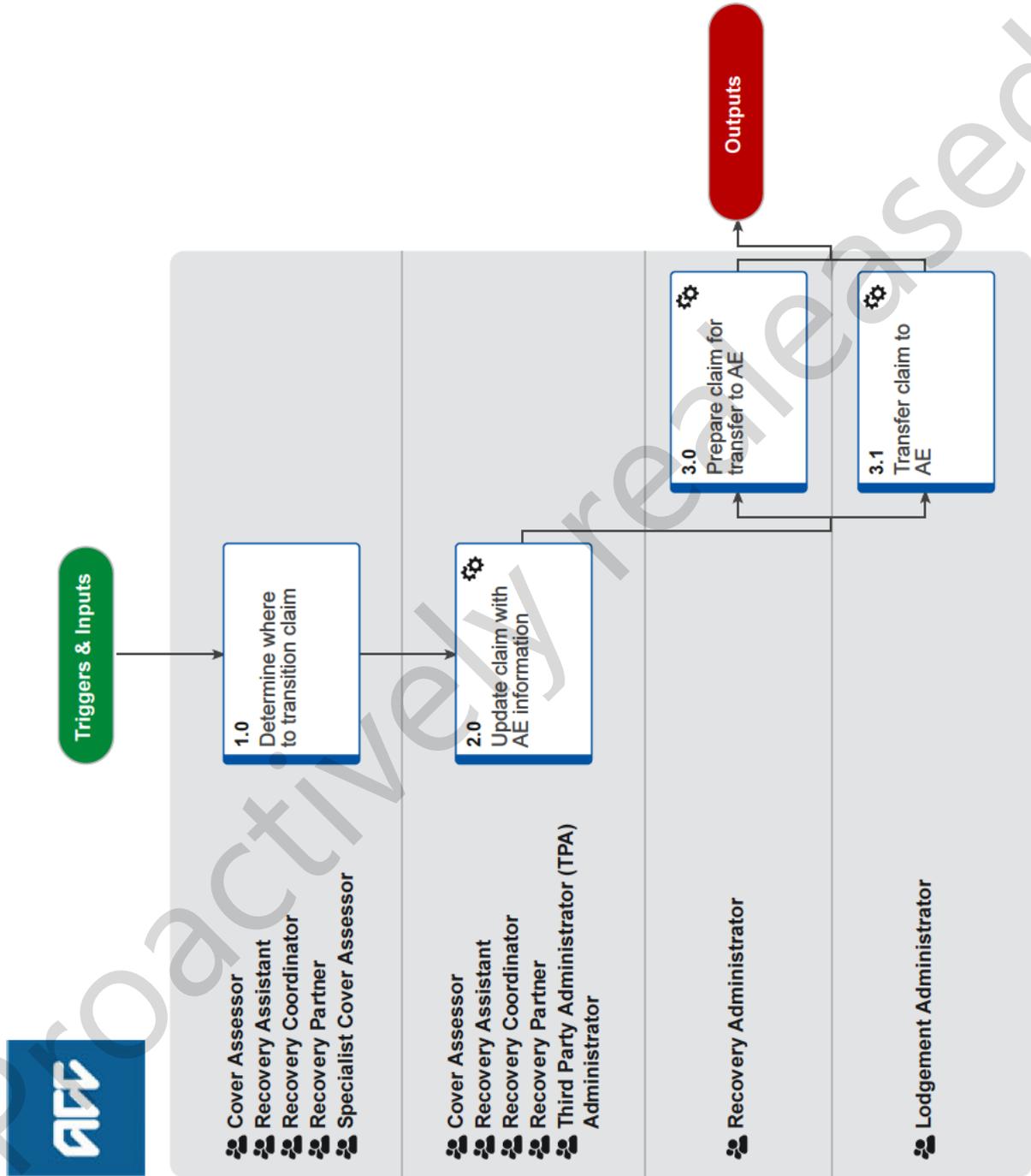


# Identify and Transfer Work-Related Injury Claim to Accredited Employer (AE) v58.0



# Identify and Transfer Work-Related Injury Claim to Accredited Employer (AE) v58.0



## Summary

### Objective

To transfer a work-related injury claim to an employer who is a participant in the Accredited Employer Programme.

### Background

The Accredited Employer Programme (AEP) is offered to employers to encourage them to manage their own workplace health and safety, injuries and rehabilitation, and employees' work injury claims. When an employer for a work related injury is identified as an AEP participant this needs to be transitioned from ACC to be managed by an AE Administrator or Third Party Administrator for the employer.

### Owner

Name withheld

### Expert

Name withheld

## Procedure

### 1.0 Determine where to transition claim

Cover Assessor, Recovery Assistant, Recovery Coordinator, Recovery Partner, Specialist Cover Assessor

- a** Review the claim to determine where it needs to be transitioned to.

**NOTE** What if the injury is Work-Related and the employer is registered under the AEP?

Go to 2.0 Update work injury claim with Accredited Employer information

- Accredited employers list (for work-related claims only)

**NOTE** What if the injury is Non-Work-Related?

Refer to Identify and Transfer Non-Work-Related Injury Claim to Third-Party Administrator (TPA)

This process ends here.

- PROCESS** Identify and Transfer Non-Work-Related Injury Claim to Third-Party Administrator (TPA)

**NOTE** What if the claim is being actively managed and or entitlements have already been set-up on an AE claim?

- If entitlements have been set-up, refer to Stop Supports and follow Steps 3.0 - Contact Client onwards.
- Advise the client their claim will be transferred to their Accredited Employer for management. The client will need to contact them to proceed with claim management.
- Contact the Accredited Employer to confirm if they have been paying weekly compensation to the client since the date of accident.
- If the accredited employer has been paying Entitlements to the Client. Task Centralised Weekly Compensation Team to raise overpayment.

- PROCESS** Stop Supports

**NOTE** What if the employer confirms they have been paying weekly compensation to the client since date of accident?

A manual overpayment will need to be created, refer to Create a Manual Overpayment

- PROCESS** Create a Manual Overpayment

**NOTE** What if the current employer is an Accredited Employer but the employer at date of accident wasn't an Accredited Employer?

Contact TPA Support team at [insurerliaison@acc.co.nz](mailto:insurerliaison@acc.co.nz) or call 04 560 5394

**NOTE** What if the injury involves a Motor Vehicle?

If the accident involved a motor vehicle, check Identifying Work-Related Personal Injury (WRPI) vs Motor Vehicle Accident (MVA) claims document to confirm if it is a WRPI or MVA.

If the claim is funded by the MVA account, follow Identify and Transfer Non-work-Related Injury Claim to Third-Party Administrator (TPA)

If the claim is confirmed to be a Work-Related injury, proceed to step 2.0.

If you are still unsure if the claim is a WRPI or MVA after consulting this document, Contact TPA Support team at [insurerliaison@acc.co.nz](mailto:insurerliaison@acc.co.nz) or call 04 560 5394

- PROCESS** Identify and Transfer Non-Work-Related Injury Claim to Third-Party Administrator (TPA)

- Identifying Work-Related Personal Injury (WRPI) vs Motor Vehicle Accident (MVA) claims

**NOTE** What if it is a duplicate Accredited Employer Claim?

Proceed to Step 2.0.

- b** Perform privacy checks on documents.

- NG SUPPORTING INFORMATION Inbound and Outbound Document Checks
- Privacy Check Before Disclosing Information Policy

### 2.0 Update claim with AE information

Cover Assessor, Recovery Assistant, Recovery Coordinator, Recovery Partner, Third Party Administrator (TPA) Administrator

- a** In Eos, add the Accredited Employer to the claim.

- Add an Employer to a Claim

- b** Check the [Injury] tab to ensure [Did the accident happen at Work] is set to [Yes].

- c** In the [General] tab, check the fund code is [Employers / Other Insurer]. If not, update to Employers / Other Insurer.

**NOTE** How do you update the fund code?

Refer to Review and Update a Fund Code.

- PROCESS** Review and Update a Fund Code

**d** In the [General] tab check the [Cover Status] and the [Cover Status Reason] has updated to [Accredited Employer]. If not, manually change the [Cover Status] to [Accredited Employer] and the [Cover Status Reason] to [Accredited Employer] and select [No] for [Send Auto Accept Letters?]

**e** In the [Tasks] tab, check an [AUTO: Generate AE Claim Transfer Notifications] task has been automatically created. This indicates the claim has correctly converted to Accredited Employer.

**NOTE What if the task failed to generate?**

In the [General] tab, edit [Cover Status] back to [Accept] and the [Cover Status Reason] back to [Criteria for Cover are Met], then click OK.

To generate the [AUTO: Generate AE Claim Transfer Notifications] Task in the [Tasks] tab, edit [Cover Status] back to [Accredited Employer] and the [Cover Status Reason] back to [Accredited Employer] and select [No] for [Send Auto Accept Letters?] then click OK. Contact the TPA Support team at [insurerliaison@acc.co.nz](mailto:insurerliaison@acc.co.nz) or call 04 560 5394 if you continue to have problems.

**f** Close the [AUTO: Generate AE Claim Transfer Notifications] task.

**NOTE What if there are other open tasks on the claim?**

These tasks need to be cancelled.

**g** In Eos, create a [(NGCM) Admin Request] Task and include the description "This claim is being transitioned to an Accredited Employer. Please create and send the appropriate documents and letters."

**NOTE These tasks need to be current date and set as High Priority.**

This is to ensure that the transfer of the AE claim is completed on the same day as the task created so there are no delays and the client is not disadvantaged.

**h** Transfer the claim to the Actioned Cases queue of the team currently managing the claim.

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### 3.0 Prepare claim for transfer to AE Recovery Administrator

**a** In Eos, open the claim via the task assigned to you.

**b** Check the General screen of the claim and ensure the Cover status is Accredited Employer.

**NOTE What if the Cover Status is not Accredited Employer?**

Transfer task back to the Recovery team member.

**c** Open the ACC45 and confirm the client name and the employer match the Eos record.

**NOTE What if the client or employer don't match?**

- If the client's name doesn't match, check the Party Record for Alternative names they may be known by. If the alternative names do not match transfer task back to recovery team member.
- If the employer's name doesn't match, search the Accredited Employer List (work-related claims only) for the employer attributed in EOS. If found, check the Subsidiaries column of that employer for a match to the employer noted on the ACC45.
- Check EOS for a contact or note from the task creator confirming the correct employer. If there is no contact or note confirming the employer attributed in EOS, continue to 3.0d
- If the employer on the ACC45 is not a subsidiary of the employer in EOS, and there is no employer confirmation in a contact or the task description, transfer the task back to the task creator.

 Accredited employers list (for work-related claims only)

**d** Create an [External] document group called 'AE Notification - Full claim transfer'.

 Manage document groups

**e** Select and export all contacts on the claim to excel. Convert to PDF and save to a network drive. Upload PDF contacts document to the 'AE Notification - Full claim transfer' document group.

**NOTE What if the claim has been previously assigned to the wrong employer?**

Do not include the CVR48 and CVR80 documents and/or any contacts referring to the incorrect employer when transferring the claim to the Accredited Employer.

**NOTE What if you don't have the option to select 'Acrobat' to convert the file to pdf?**

Use filing away to convert the excel workbook to pdf.

- 1) Select File then Share
- 2) Attach a copy of the excel workbook to the email to file away
- 3) Copy and paste the required information for the subject line of the email from the case details section of the General tab
- 4) Email to [filing@claims.acc.co.nz](mailto:filing@claims.acc.co.nz)

 Compiling and Saving Contacts System Steps

**f** In the [Documents] tab manually search and add CVR25-Accredited Employer claimant transfer letter (Client) and CVR26-Accredited Employer claimant transfer letter (Claim Lodgement Vendor).

**NOTE What should you consider when processing a CVR26?**

- We can send a CVR26 via email if their email address is verified in EOS.
- Be aware that the CVR26 will generate with the Provider contact details regardless of selecting Vendor Details as recipient. If Vendor is the more appropriate recipient, manually amend the CVR26 with Vendor contact details.

 CVR25 Accredited Employer Claim Transfer - Claimant

 CVR26 Accredited Employer Claim Transfer - Vendor

**g** Save letters as 'Completed'. Add 'AE Notification - Full claim transfer' as the description.

- h** Link the ACC45, CVR40, CVR25, CVR26, medical records and any other documents related to the work injury/accident to the 'AE Notification - Full claim transfer' document group.
  - Do not include the CVR80 if this claim had previously been incorrectly assigned to a different employer.
  - Do not generate or include an CVR40 if cover decision was still pending.
  - Do not include 'Snapshot Document' (Real-time earnings from IR) if this is on the claim.

- i** Perform the dispatch privacy checks before disclosing information to client, vendor and employer.

 NG SUPPORTING INFORMATION Inbound and Outbound Document Checks

- j** Go to the 'Email Multiple Documents from Eos using a Template' section of the system steps below.
  - Expand the 'Employer' contacts and select 'AE Claims Administrator' as the recipient.
  - Update the contact details in the email to 'InsurerLiaison@acc.co.nz'
  - Send the email.

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

**NOTE What if there is no AE Administrator in the employers party record?**

Confirm employer details on Accredited employers list (for work-related claims only).
 

- Confirm the correct ACC employer number.
- Transfer task back to recovery team member to update employer details with correct employer party record.

**NOTE What if the client has a Care Indicator in Eos**

This will need to be disclosed to the Accredited Employer in line with our disclosure of Care Indicator information to Third Party Policy

 **PROCESS** Disclosure of care indicator information to third parties Policy

 Accredited employers list (for work-related claims only)

- k** Email or post the CVR25 letter to the Client and the CVR26 letter to the Lodging Provider/Vendor and update the contact details in the email with the Employer's 'AE Claims Administrator' email address.

**NOTE What if the address is unverified in Eos?**

Post the CVR25 letter to the unverified address. The letter does not contain any personal information.

- l** Close the 'NGCM - Admin Request' task.

**NOTE What should you consider when processing a CVR26?**

- We can send a CVR26 via email if their email address is verified in EOS.
- Be aware that the CVR26 will generate with the Provider contact details regardless of selecting Vendor Details as recipient. If Vendor is the more appropriate recipient, manually amend the CVR26 with Vendor contact details.

- e** Create an [External] document group called 'AE Notification - Full claim transfer'.

- f** Select and export all contacts on the claim to excel. Convert to PDF and save to a network drive. Upload PDF contacts document to the 'AE Notification - Full claim transfer' document group.

- g** Link the ACC45, CVR40, CVR25, CVR26, medical records and any other documents related to the work injury/accident to the 'AE Notification - Full claim transfer' document group.

**NOTE Do not include the CVR80 if this claim had previously been incorrectly assigned to a different employer.**

**NOTE What if the claim is for HL?**

Check Party Record for ACC724 and include this in documents to send.

- h** Complete a Privacy check on all relevant documents and contacts.

**NOTE What if the claim has previously been assigned to the wrong employer?**

Do not include the CVR48 and CVR80 documents and/or any contacts referring to the incorrect employer when transferring the claim to the Accredited Employer.

- i** Go to the 'Email Multiple Documents from Eos using a Template' section of the system steps below. Use Accredited Employer email template.

1) Expand the 'Employer' contacts and select 'AE Claims Administrator' as the recipient.

2) Update the contact details in the email to 'InsurerLiaison@acc.co.nz'.

3) Update signature with the following:

Kind Regards

ACC Client Services & Support

This is a secure email address accessed by authorised ACC employees only.

4) Send the email.

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

- j** Close the [AE Notification] task.

### 3.1 Transfer claim to AE

#### Lodgement Administrator

- a** In Eos, open the claim via the task assigned to you.
- b** Check the [General] screen of the claim and ensure the [Cover Status] is Accredited Employer.
- c** Check the [Information Required] tab for and Resolve any outstanding IR Tasks. Case Alias tasks will not appear in the [Task] tab and needs to be assessed before AE Transfer.
- d** Generate CVR25-Accredited Employer claimant transfer letter (Client) and CVR26-Accredited Employer claimant transfer letter (Claim Lodgement Vendor).