



Proactively Released



Recovery Assistant  
Recovery Coordinator  
Recovery Partner

Recovery Administrator

## Summary

### Objective

To action a request or need for support so the client receives it at the right time during their recovery journey. In many cases setting up supports takes place after a social assessment has been completed.

### Background

Social supports provide assistance to restore a client's independence to the maximum extent practicable. This assistance may include providing non-acute rehabilitation, residential support, aids and appliances, attendant care, housing modifications or transport for independence. We contract with providers to assess clients' needs for social rehabilitation assistance

These are supports for clients aged 21 or under who are undertaking early childhood, primary, intermediate or secondary level education and require injury related support.

**Owner** Name Withheld

**Expert** Name Withheld

## Procedure

- PROCESS** **Arrange Education Based Rehabilitation Assessment**  
Recovery Assistant, Recovery Coordinator, Recovery Partner

### 1.0 Determine support required

Recovery Assistant, Recovery Coordinator, Recovery Partner

- a** Review the approved Education based rehabilitation assessments (EBRA) and identify the type of support requested. For more information on education supports, refer to the policy page below.

About education support Policy

**NOTE** **What if an Education Based Rehabilitation Assessment has not been completed?**

Go to the process below

- PROCESS** Arrange Education Based Rehabilitation Assessment

### 2.0 Contact client or legal guardian to discuss support

Recovery Assistant, Recovery Coordinator, Recovery Partner

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

Identity Check Policy

- b** Explain that you are referring the client for this support, why the support is required and what their rights and responsibilities are. Make sure the client or legal guardian understands and agrees with the support.

Client Legislative Rights and Responsibilities Policy

**NOTE** **What if the client requests the Recovery Team Member to discuss the treatment request with another person?**

Refer to the process below

- PROCESS** Obtain Authority to Act (ATA)

**NOTE** **What else do you need to discuss with the client?**

Advise the client that the provider will be in touch to arrange the support.

**NOTE** **How do you manage participants on a claim?**

The Recovery Team Member must ensure all known participants are loaded on the claim and then removed when they are no longer relevant. For information on how to manage participants, refer to Manage Participants (Eos Online Help).

Manage Participants (Eos Online Help)

- c** In Salesforce, add a contact to record the conversation with the client/guardian.

**NOTE** **What do you have to do to document your decision?**

To document your decision please refer to the '(NGCM Document Recovery Decisions' process below.

- PROCESS** Issue Recovery Decision

- d** Ensure to add the support as an intervention in the Recovery Plan.

**NOTE** **How do you update the Recovery Plan?**

Go to the process below.

- PROCESS** Create or Update Recovery Plan

### 3.0 Request education support

Recovery Assistant, Recovery Coordinator, Recovery Partner

- a** In Eos, create a document group specific to the support approved. In the document group description field enter the service type 'Education Support worker service', 'Teacher Aide service' or 'Tutor service' and today's date. Refer to the system steps below to confirm how to create a document group.

**NOTE** **What documents do you need to include?**

A completed ACC345 Education Support Assessment Report or a recently completed Support Need Assessment Report

Manage document groups

- b** Perform privacy checks on the documents.

Privacy Check Before Disclosing Information Policy

NG SUPPORTING INFORMATION Inbound and Outbound Document Checks

**NOTE** **What if information needs to be redacted?**

Send a NGCM admin request task to say please call when available- redactions needed to be applied to referral file/document.

NGCM - Redact information from PDF documents

- c** In Eos, select the vendor (service supplier) and check if they are registered.

**NOTE What if the service supplier is registered but not active?**

Contact Health Procurement to have the registration activated.  
Provide the service item codes that are required.

**NOTE What if the service supplier is not registered as a vendor with ACC?**

Email the service supplier the document 'Register to be a vendor'.  
This has a link for the supplier to register online at acc.co.nz.

 Register to be a vendor.docx

 Service Contracts and Contracted Providers - MFP spreadsheet

- d** In Eos generate a 'NGCM - Admin Request' task to Recovery Administration for Education support services.

**NOTE What details do you include in the task?**

- Service Type that needs to be implemented – Education Support Worker, Teacher Aide or Tutor.
- Additional information relevant to the specific service type such as reports, documents and forms to be included.
- The name of the registered vendor recommended in the ACC345 Education Support Assessment Report.
- The name and contact details of the pre-school.
- Purchase order service items codes required.
- Hours per week.
- Start date.
- Length of time.

If your client has a care indicator. Refer to 'Disclosure of care indicator information to third parties' policy for information about when this needs to be shared.

 Disclosure of Care Indicator Information to Third Parties Policy

 NG GUIDELINES Purchase Order Details - Education Support

 Contracted Suppliers by Geographic Area of Coverage

- e** Consider the timing of the task. The tasks route to the Recovery Administration team with an SLA of 24 hours.

**NOTE What if the request is urgent and needs to be completed that day?**

Call Recovery Administration, provide the claim number and request the task is completed today.

**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.

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## 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 the link below.

 Principles of Working in the Administration Team

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## 5.0 Create purchase order

### Recovery Administrator

- a** In Eos, generate a purchase order for the approved support. Refer to the purchase order documents below for more information.

 Creating purchase orders using general + QE

 NG GUIDELINES Purchase Order Details - Education Support

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

- b** Locate contracted vendors via the Geographic Location search, this must be done even if the vendor details are provided in the task. Once selected add the vendor as a 'Vendor - Contracted' participant in Eos.

 Manage Participants (Eos Online Help)

 Contracted Suppliers by Geographic Area of Coverage

**NOTE How do you search for a vendor**

Refer to 'Search for a party'.

 Search for a Party

- c** Approve the purchase order and the generate the relevant purchase order documents, for new purchase orders and extensions, as shown below.

 ACC5967 Terms of agreement for education support services

 EDS01 Education support approve - client

 EDS05 Letter of agreement for tutors and teachers aide - school

 ACC255 Kōrero mai - Working together

**NOTE What if you do not have the delegation to approve the purchase order?**

- 1) Save the purchase order.
- 2) Create and send a Request Authorisation task to a Recovery Administration Leader for a purchase order approval.  
Follow the link below.

 Request Authorisation for a Purchase Order - System Steps

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## 6.0 Notify Client and Vendor

### Recovery Administrator

- a** Check the client's preferred communication channel (SMS, email, etc), and if the client has a safe contact (if this has not been included in the referral task). Consider the email and instant messaging policy below.

 Email and Instant Messaging Policy

**NOTE How do you confirm if the client has a safe contact?**

Refer to View a safe contact (Eos Online Help)

 View a safe contact (Eos Online Help)

- b** Send the relevant approval letters to the client or legal guardian. If sending via email ensure you have replied to the message quarantined email required.

**NOTE** How do you send a notification to a client?

Refer to Create a Notification - System Steps.

 Create a Notification - System Steps

- c** Create and send an email to the vendor using the appropriate email template, and attach the relevant documents.

**NOTE** What if the approval is for Education Support Worker services?

Send an ACC5925 Education Support Worker referral form

**NOTE** What if the approval is for a Teacher Aides and Tutor services?

Send an ACC5967 Terms of agreement for education support services form for the vendor to sign and return

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

**NOTE** What if the vendor requires the documents to be sent via courier?

Refer to the packing guide below.

 Packing guide.docx

- d** Close the referral task

**NOTE** What if you are advised by a Provider they are unable to accept a referral?

Go to Activity 5.0 (a) and complete a re-referral.

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 **PROCESS**

**Create or Update Recovery Plan**

Recovery Assistant, Recovery Coordinator, Recovery Partner

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