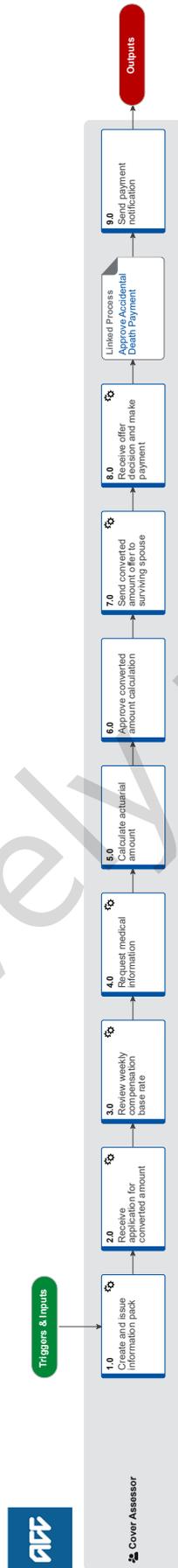


# Set Up Fatal Weekly Compensation Converted Amount Offer v9.0



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## Summary

### Objective

To create and send a converted amount offer and then set up converted amount offer payments.

### Background

A surviving spouse can choose to have their weekly compensation paid out as a converted amount instead of receiving regular weekly compensation payments. If they elect to do this, they can receive the agreed amount as a single payment, or two or more payments at least six months apart.

Owner [Name withheld]

Expert

## Procedure

### 1.0 Create and issue information pack

#### Cover Assessor

- a** Receive ['Advise Spouse of Converted Offer'] task.

Eligibility for receiving a converted weekly compensation offer

- b** Check the weekly compensation has been finalised.

**NOTE** What if the weekly compensation is at review?

Extend ['Advise Spouse of Converted Offer'] task out until review is finalised.

- c** In Eos, generate and print the ACD80 Converted amount weekly comp first offer spouse pack.

ACD80 Converted amount weekly comp first offer - Spouse

**NOTE** What is included in the ACD80 pack?

The ACD80 pack includes:

- ACC6300 Authority to collect medical and other records
- ACDIS03 Converting your weekly compensation.

- d** Add the ACC655 Application for a Converted Amount (1992 1998 and 2001 Acts) form into the pack.

ACC655 Application for a Converted Amount (1992 1998 and 2001 Acts)

- e** Add a pre printed copy of the 'How ACC can affect a benefit' Work and Income information sheet into the pack.

- f** Send all documents to the surviving spouse via post.

Recipient of an offer of a converted amount of accidental death weekly compensation

### 2.0 Receive application for converted amount

#### Cover Assessor

- a** Receive task advising that an application and consent form has been received.

- b** Check that you have received all information.

**NOTE** What information is required?

- You have received the ACC655 Application for a Converted Amount (1992, 1998 and 2001 Acts).
- The ACC6300 Authority to collect medical and other records has been returned.
- Both forms are complete and have been signed.

**NOTE** What if you have not received all the information that is required?

• If you can obtain the missing information by phone, then the surviving spouse to obtain the information. In Eos, note when, how and from whom you got the information.

• If you cannot obtain the missing information by phone, then email the application form to the surviving spouse identifying the required information and keep a copy of the form on the client's file.

- c** Contact the surviving spouse to confirm their tax code.

**NOTE** What if the surviving spouse's tax code needs to be updated?

Update the surviving spouse's tax code. Refer to Manage Client Tax Code.

**PROCESS** Manage Client Tax Code

### 3.0 Review weekly compensation base rate

#### Cover Assessor

- a** In Eos, check that the weekly compensation base rate was calculated by payments team.

**NOTE What if the original weekly compensation base rate was not calculated by the payments team?**

- Send a General task to the payments team to review and confirm that the fatal weekly compensation base rate was previously calculated correctly.
- Receive general task back from the payments team. Go to 4.0 Request medical information.

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## 4.0 Request medical information

### Cover Assessor

- a** Check that the spouse has not previously applied for a converted amount.

**NOTE What if the spouse has previously applied for a converted amount?**

- If it has been more than six months, then obtain new information from the surviving spouse's medical practitioner from the date they last supplied medical notes. Go to task b.
- If it has been less than six months, then use the information obtained from the spouse's medical practitioner at the time of their last application. Go to activity 5.0 Calculate actuarial amount.

- b** Request medical information from surviving spouse's doctor.

**NOTE How do you request medical information?**

1) Create a purchase order (PO) requesting medical information in the Eos 'Entitlement' tab using code FS03 for \$189.75 and load the general practitioner/medical centre listed on the ACC655 as the provider. Authorise the PO once you have loaded all the information.

2) Create the ACD126 Request medical questionnaire GP – vendor letter (this includes the ACC693 Medical history form) and:

- Include a copy of the relevant authority to collect relevant records
- Include a reply paid envelope
- Send it to the medical practitioner identified on the application form
- Update the automatically-generated Eos task to follow-up with the general practitioner in four weeks.

 ACD126 Request medical questionnaire GP - vendor

- c** Receive medical information back from the surviving spouse's doctor.

- d** Request an underwriter's assessment by emailing the ACC693 and password protected (password - underwriter) medical notes or couriering the documents directly to the underwriter.

- e** Email an underwriter asking them to review the information.

**NOTE Who is the underwriter?**

Currently we are using [Name] to underwrite fatal converted amounts.

His email is [Name withheld]

The email to him must have the subject line: FOR THE ATTN OF [Name] to identify this as an ACC request.

- f** Create a follow-up task to follow-up with the underwriter four weeks from the date of the request.

**NOTE What information do you enter into the task?**

Ensure you add the date you sent the email to the underwriter in the task. This means that the task and email can be followed up by another team member in case you are absent.

- g** Receive mortality rate back from the underwriter.

 Request for medical records to calculate a converted amount of accidental death weekly compensation

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## 5.0 Calculate actuarial amount

### Cover Assessor

- a** Open the current monthly 'Half\_Yearly\_Spouse\_v...' calculation spreadsheet.

**NOTE Where is the calculation spreadsheet located?**

The calculation spreadsheet can be found in the following folder:  
\\ACCfiles\Data\Public\Calculators\Spousal WC

The calculation spreadsheet is updated by Actuarial Services every 6 months.

 Calculating amount of converted weekly compensation

- b** Populate the required fields in the 'Entry' tab in the spreadsheet.

- c** Complete the 'ACC742' tab of the spreadsheet.

- d** Save the completed ACC742 Converted amount offer assessment in the same folder as the calculator.

- e** Send a general task to the Accidental Death Queue to approve the calculated amount.

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## 6.0 Approve converted amount calculation

### Cover Assessor

- a** Receive task from Cover Assessor requesting review of converted amount offer calculation.

- b Open calculation spreadsheet that has been saved in the folder.

**NOTE Where is the calculation spreadsheet located?**

The calculation spreadsheet can be found in the following folder:  
\\ACCfiles\Data\Public\Calculators\Spousal WC

- c Review information that has been entered into the calculator.

**NOTE What if there is an error with the information that has been entered into the calculator?**

Send the task back to the user who sent it with any instructions in the task description that are required in resolving the error.

- d Send task back to Accidental Death Queue to advise calculation is correct and has been approved.

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## 7.0 Send converted amount offer to surviving spouse

### Cover Assessor

- a Receive task from a Cover Assessor confirming the converted amount calculation is correct.

**NOTE What if the calculation was incorrect?**

Go to 5.0 Calculate actuarial amount to correct the calculation spreadsheet.

- b In Eos, generate and print the ACD130 Converted amount offer – party pack, making sure you include the correct offer amount from the ACC742 in the offer letter (ACC656).

 ACD130 Converted amount offer - party

**NOTE What is included in the ACD130 Converted amount offer pack?**

The ACD130 Converted amount offer pack includes the ACC656 Converted amount offer accept or decline form and the ACDIS03 Converting your weekly compensation information sheet.

- c Add a pre printed copy of the 'How ACC can affect a benefit' Work and Income information sheet into the pack.

- d Send the documents to the spouse and create a task for the forms to be returned at least one week prior to the offer effective date.

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## 8.0 Receive offer decision and make payment

### Cover Assessor

- a When the offer form is returned, check that all sections have been completed including the tax rate.

**NOTE What if the form is not complete?**

Contact the spouse to obtain the required information or return the document to the spouse. Keep a copy of the form on Eos.

**NOTE What if the form is not returned?**

Follow up with the spouse prior to the date that Weekly Compensation is due to cease. If it is not returned prior to that point then close of any converted offer related tasks and only begin the process again if the spouse gets back in touch - at that point return to point 2.0 and start process again.

**NOTE What if the spouse declines/withdraws the offer?**

Send ACD87 letter to spouse to confirm the decline/withdrawal of the offer to convert their Weekly Compensation.

 ACD87 Converted amount weekly compensation stop processing application

 ACC656 as the preferred method to confirm acceptance of an offer of a converted amount of accidental death weekly compensation

 Information needed to confirm acceptance of an offer of a converted amount of accidental death weekly compensation

- b In Eos, edit the [Period To Date] in the current payment period so that the end date is the day before the converted amount offer payment date.

 Edit a payment period

 End date for accidental death weekly compensation when a converted amount is accepted

 Timing of setting end date for accidental death weekly compensation when a converted amount is accepted

- c Add a new payment period with a period type of 'Do Not Pay' and a [Status Reason] of 'Converted offer'. Ensure the [Period To Date] is the same as the entitlement cessation date that is visible in the [Entitlement Details] tab.

 Add a payment period

- d Create the converted amount payment.

 Create converted amount offer payment

 Payment of a converted weekly compensation payment

 Date of payment of the first instalment of a converted amount of accidental death weekly compensation

 When an initial instalment of a converted weekly compensation payment must be paid by

 Paying converted weekly compensation amount in instalments

-  Calculating amount of an instalment of converted weekly compensation
  -  Time between paying converted weekly compensation payment in two or more instalments
  -  Payment of remaining converted amount instalments to estate of spouse/partner
- e** Send an ['Approve Fatal Entitlements'] task to the Accidental Death queue to get the payment approved.
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 **PROCESS**      **Approve Accidental Death Payment**  
Cover Assessor

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**9.0 Send payment notification**

Cover Assessor

- a** Receive task back from approver.
  - b** Send the client an ACD83 Converted amount weekly comp confirmation – spouse to confirm payment has been made.
    -  ACD83 Converted amount weekly comp confirmat
  - c** Close the task.
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Proactively released