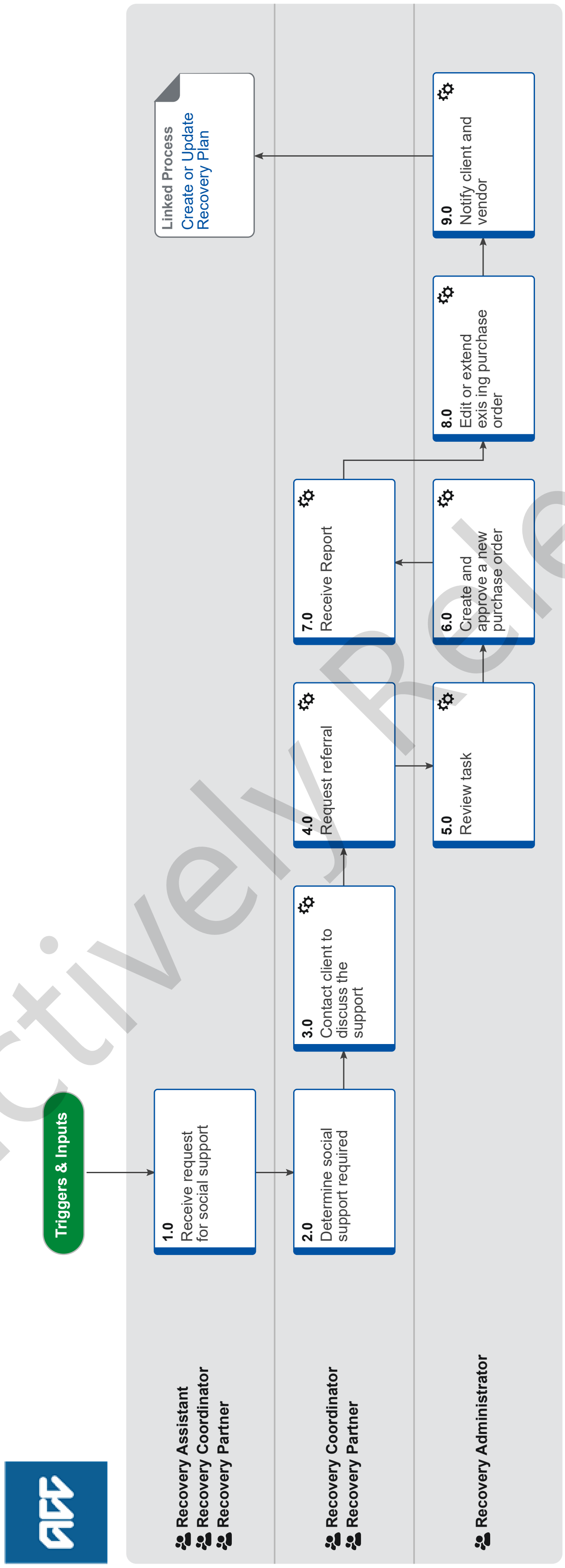
Set Up Living My Life Support v29.0



Summary

Objective
To set up Living my Life support service for encouraging a client's understanding of their aspirations and goals, build their capability to create community and employment participation outcomes, and to direct the services and supports they receive.

The Living my Life Disability Support Service is designed to support clients with a significant impairment, complex needs or a disability, as a result of their injury.

Background
Living my Life uses a disability approach, in the delivery of individualised disability support, in the community. The mode of delivery is outcomes based. The expectation is that the supplier works with the client, their family/whānau to develop goals to increase participation across their life roles. Importantly, this service is not rehabilitation.

Owner Name Withheld

Expert Name Withheld

Procedure

1.0 Receive request for social support

Recovery Assistant, Recovery Coordinator, Recovery Partner

a Receive request or recommendation for Living My Life support.

NOTE **How might the recommendation for support be received?**
Recommendation for Living My Life support may come from:
• a social assessment such as a Support Needs Assessment (SNA)
• recommendation for a further programme from a Living My Life completion report
• recommended by another provider working with the client
• identified through a conversation with the client such as a Recovery Check In.

NOTE **What if the request for support indicates an assessment is required?**
Arrange a Support Needs assessment (SNA).
PROCESS Arrange Support Needs Assessment

NOTE **What if the client is managed in Assisted Recovery?**
The client should be transitioned to Partnered Recovery.
PROCESS Transition Claim

NOTE **What if the client is managed in Supported Recovery ?**
Determine if the clients needs are extensive or intensive and could be better managed in Partnered Recovery. Use the transition claim guidelines if doing so.

In exceptional circumstances, Living My Life can be considered in Supported Recovery but may require Recovery Support input, specifically technical services.
PROCESS Transition Claim

b Understand the different types of Living My Life support available for the client.

NOTE **Client self-management is currently on hold**
Client self-management is currently on hold to new entries while we look at broadening the offering. Therefore referrals for Coaching to Self-Manage are not recommended.

ACC7436 Living My Life referral

Living My Life Disability Support Services Service Page

ACC Self-management process intersecting with Living My Life components (Tailored Support & Coaching to Self-manage)

2.0 Determine social support required

Recovery Coordinator, Recovery Partner

a Confirm the client's eligibility for the requested support(s).

NOTE **What are the eligibility criteria for Living my Life?**
A client can be referred to Living my Life when they have a significant impairment, complex needs or disability including mental injury. They don't have to be a serious injury client - the main factor in determining client eligibility based on their needs.

A client can be referred to the appropriate service component if they have one or more of the following issues, or they have similar issues that hinder their active participation in their life and community:

• Difficulty identifying their aspirations and goals
• Difficulty adapting to their disability
• Limited work experience
• A lack of social connections
• A change in circumstances
• Limited capability managing transition milestones
• Limited skills to live independently
• Limited knowledge of options in the community
• Lack of connection to cultural and community
• Poor decision-making skills
• Behavioural or cognitive needs
• At risk of isolation
• High and complex physical and/or social needs
• Limited knowledge about Self-Management

NOTE **What if the client is receiving other services, such as Residential Support, Training for Independence or Home & Community Support?**
Other services can be funded alongside Living My Life support, but the goals of each service must be different and be provided under the appropriate service type. Please refer to the Service Page for further details.

Living My Life Disability Support Services Service Page

NOTE **What do you need to consider when the entitlement request is received and deemed cover exists?**
Refer to the Deemed Cover and Entitlements Policy for considerations to determine client entitlement eligibility while in deemed cover period.

Deemed Cover and Entitlements Policy

NOTE **What if the client is in Partnered Recovery or Supported Recovery?**
When the clients support needs are determined, please refer to the Case and Claims Management Features Delegation to determine if written guidance is needed from a technical specialist.
PROCESS Seek Internal Guidance

Delegations Framework

b Consider other options available to the client.

NOTE **What are the other options available to the client that are specific to social support?**
If a client has a complex injury and all of the criteria for cover has been met, we would make the referral and then work with the client either on their short term facilitated pathway, independent facilitation, tailored support and/or coaching for self management. We will be able to identify what level of support they require.

3.0 Contact client to discuss the support

Recovery Coordinator, Recovery Partner

a Confirm you are speaking with the right person by asking ACC's identity check questions.

Identity Check Policy

Client Legislative Rights and Responsibilities Policy

b Explain the support, if it is being approved/partially approved/declined, and what their rights and responsibilities are. For guidance on how to discuss the support with your client, refer to the notes below.

NOTE **What else do you need to discuss with the client for 'Coaching to Self Manage'?**
Ensure that the client understands that this is a short-term support intervention (up to 3 months) for clients who would benefit from a supported decision-making approach to learning about self-management, determining their readiness to self-manage, and choosing the type of ongoing support required to manage their budget and direct their support services.

Additionally, it is to enable the client and their family/whānau to understand self-management and make a decision regarding their readiness to self-manage or not. If self-managing, the client will be able to decide how and what to self – manage.

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

c Check the client has granted ACC the authority to collect medical and other records.

View Client Consent

NOTE **What if the client has not granted ACC authority to collect medical and other records?**
Go to (NGCM) Obtain Client Authority to Collect Information. Once received, return to this process.
PROCESS Obtain Client Authority to Collect Information

NOTE **What if the client does not agree to participate?**
In this situation we can't apply non-compliance, we would simply send them a decision letter stating that we could not assist due to lack of information.

d Approve or decline the request.

NG Principles Decision Making

e In Salesforce, record the details of the discussion with the client regarding the decision to approve/partially approve/decline the request.

NOTE **What if the request is declined?**
1) Explain to the client how this decision was made.
2) Their options, such as getting support from Ministry of social development and DHB.
3) Their right to review the decision and the timeframes for this.
4) They can contact the citizen's advice bureau for independent support and advice.
5) Send the decline letter below to the client.
6) This process ends.

f Check if the client has a preferred provider

NOTE **What if the client has a Preferred Provider**
Using the Contracted Suppliers by Geographic Area of Coverage doc, confirm the Provider is contracted for this service and add as a participant on the claim.

If they are not a contracted provider for this service advise alternative Providers to your client and add as a participant on the claim.

Contracted Suppliers by Geographic Area of Coverage

Manage Participants (Eos Online Help)

g Ensure to add the approved support as an intervention in the Recovery Plan.

NOTE **How do you update the Recovery Plan?**
Go to (NGCM) Create or Update Recovery Plan.
PROCESS Create or Update Recovery Plan

4.0 Request referral

Recovery Coordinator, Recovery Partner

a In Eos, create a referral-specific document group and name it 'Living My Life'. Refer to the system steps below for further guidance.

ACC45 ACC Injury claim.pdf

ACC7436 Living My Life referral

Manage document groups

Admin Template - ACC7436 Living My Life

NOTE What documents do you need to include?

• Latest Support Needs Assessment or Social Rehab Assessment
• Neuropsychological assessment - ensure unnecessary sensitive personal information is redacted
• Behavioural Support Services reports (if on file)
• Home and Community Support Services (HCSS) Progress/Completion report
• Recovery Plan (RP) and/or prior to 01/08/19 Individual Rehabilitation Plan (IRP)
• Training for Independence Report (if applicable)

b Perform privacy checks on documents.

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

NOTE What if you find information that needs to be redacted?

Send an email to Recovery Administration (recoveryadmin@acc.co.nz) and include the document to be redacted plus your redaction instructions, before adding the document to the document group.

- NGCM - Redact information from PDF documents

c Add the documents to the group.

- Manage document groups

d Generate a Social Rehabilitation Referral task for the Living my Life support. Complete all the mandatory fields.

NOTE What information do you need to include in the task/e-form?

Refer to the 'Manage Referral Task Templates' document.

- Manage Referral Task Templates
- Living My Life Disability Support Services Service Page
- Service Contracts and Contracted Providers - MFP spreadsheet
- Referring Tasks to Recovery Administration - Principles

NOTE How do you create a task for the Living My Life support?

Go to NGCM Create a Referral Task.

- Creating Manage Referral Tasks - System Steps

NOTE What do you do if Mental Injury Claim information needs to be sent with a Referral from a Physical Injury Claim?

In Eos, manually transfer the Referral Task generated to the Recovery Administration department with the Sensitive Claims Administrator Role

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

• Call Recovery Administration
• Give the Recovery Administrator who answers the call the claim number
• The Recovery Administrator will open the claim in Eos and find the task on the claim
• Transfer the task into the Recovery Administrator's name. This will move it to their personal Eos queue and stop it from being reallocated by Salesforce.

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

NOTE What are the SLAs?

The referral tasks route to the Recovery Administration team with an SLA of 24 hours.

NOTE What if your client has a Care Indicator?

You need to clearly outline this in the e-form.

Refer to Disclosure of Care Indicator Information to Third Parties Policy below for more information on how information is disclosed.

- Disclosure of Care Indicator Information to Third Parties Policy
- Principles of Working in the Administration Team

5.0 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 the required information to complete the referral form.

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

6.0 Create and approve a new purchase order

Recovery Administrator

a In Eos, generate a Purchase Order for the Living my Life referral.

- Purchase Order Details - Living My Life
- Purchase Order - Handy Hints on how to create and edit POs
- Admin Template - ACC7436 Living My Life

b Identify and select a contracted Provider in the client's geographic area.

NOTE What if a preferred Vendor has been identified in the task?

In Eos, add the vendor as a 'Vendor - Contracted' participant.

- Manage Participants (Eos Online Help)
- Contracted Suppliers by Geographic Area of Coverage

c Complete the ACC7436 Living My Life referral - PO Vendor and approve the Purchase Order.

NOTE What if you do not have the delegation to approve the Purchase Order?

Save the Purchase Order. Refer to the system steps below for further information.

Ensure you include the completed ACC7436 Living my Life Referral document.

Request Authorisation for a Purchase Order - System Steps

d Create an email using the Requests and referrals template, attach the ACC7436 referral and document group. Select the most appropriate email address (generally under General Purchasing) for the vendor.

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

NOTE **What if there is a document group?**
Open document group and link the ACC7436 to the group and email to the vendor.

NOTE **What if the document group is too large to send in a single email?**
Contact the vendor and ask if the referral can be sent by courier. If yes, confirm correct physical address then go to Prepare and Send Client Information by Courier then return to this process. Otherwise, send by email.

PROCESS Prepare and Send Client Information by Courier

NOTE **Do you need to notify the client?**
No. The client will be notified once the initial Plan has been received.

e In Salesforce, close the assigned referral task.

7.0 Receive Report

Recovery Coordinator, Recovery Partner

a In Eos, receive notification that the initial report has been received and attached to the claim

NOTE **What if the supplier submits a new plan when they submit the ACC7437 Service Review report when the purchase order is ending?**
Confirm the client has a permanent disability and/or and has ongoing need. Once satisfied there is ongoing need, request a new purchase order for a further 12 months. A new PO will be accompanied by the ACC7436 referral document

b Review the report and the programme costings

c Perform Privacy and Relevancy checks on the received report

NG SUPPORTING INFORMATION Inbound and Outbound Document Checks

d If required, contact the vendor to discuss any questions you have and agree on a timeframe for completing an amended report. In Salesforce, record the conversation as a contact on the claim.

NOTE **What if you are considering declining the quote?**
Contact the vendor to discuss any questions and agree on a timeframe for amending or providing a new report with costings.

NOTE **What if you do not have delegation to approve the programme?**
You will need to request this through Written Guidance - refer to the Seek Internal Guidance Process.

PROCESS Seek Internal Guidance

Delegations Framework

e Create and send a NGCM - Edit Manage Referral Purchase Order task to Recovery Administration and include the following details:
• purchase order number
• date range - include whether the provider has indicated in the client's plan if sessions should be approved on a weekly, monthly or annual basis
• codes (note that travel codes, with the exception of air travel do not require prior approval).

8.0 Edit or extend existing purchase order

Recovery Administrator

a Open the NGCM - Edit Manage Referral Purchase Order task using [Do Task]:

• In Eos, click on [Search for a claim]
• Select the “Purchase Order / ACC32 Number” tab and paste the purchase order number into the purchase order number box
• Select [Open].

NOTE **What if you are extending/adding new hours/dates/codes to a current purchase order?**
• The extension date is taken from the day after the previous extension has finished.• Select 'Edit' to end the current PO in line date noted in the task or for the date the task was created by the recovery Team Member.

• Select "Add" to add a new line with the date noted in the task or the day after the end of the current purchase order line with the new hours/dates/codes as per the task.

• If there is a date gap between when the old purchase order line ends and the new purchase order line begins, call the Recovery Team/Team Member to clarify.

• The extension date is taken from the day after the previous extension has finished.

NOTE **What If there are multiple PO codes?**
• Select 'Edit All'

• in the 'Entitlement maintenance' screen change the end date to the date noted in the task for each purchase order code and line. Select OK.

• Select "Add" to add a new line with the date noted in the task or the day after the end of the current purchase order line with the new hours/dates/codes as per the task.

• If there is a date gap between when the old purchase order line ends and the new purchase order line begins, call the Recovery Team/Team Member to clarify.

• The extension date is taken from the day after the previous extension has finished.

NOTE **What if the code, hours and frequency remains the same?**
• Select 'Edit All' to end the current PO line for the date noted in the task or for the date the task was created by the recovery Team Member.

• Highlight the current PO line, select copy then OK.

• If you get a duplicate error select 'ignore duplicate entitlements' and select OK.

b Approve the Purchase Order.

NOTE **What if you do not have the delegation to approve the Purchase Order?**
Save the Purchase Order and refer to the system steps below for guidance.

Request Authorisation for a Purchase Order - System Steps

9.0 Notify client and vendor

Recovery Administrator

a Check the client's preferred communication channel (SMS, email, etc) under the party record. Consider the email and instant messaging policy below.

Email and Instant Messaging Policy

b Send a notification to the client along with the approval letter and information sheet (LML01 Client and LMLIS01). (If not created already create the approval letter for the client). This notification to the client is only required once, after the initial plan has been created.Contacting the client is not required for extensions of LML Tailored Support.

NG SUPPORTING INFORMATION Inbound and Outbound Document Checks

NOTE **How do you send a notification to a client?**
Refer to the 'Create a Notification - System Steps' link below.

Create a Notification - System Steps

c Create an email using the Purchase order template and advise the new target date for the specific service.

Select the most appropriate email address.
TIP: It is common for the applicable email address to be listed under General Purchasing.

NOTE **Do you need to notify the vendor if you've updated a purchase order following an invoice query?**
You do not need to notify the vendor, the payment teams will advise them in the invoice is paid or declined.

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

Email and Instant Messaging Policy

d Send the email template, on behalf of the Recovery Team member, to the Provider to confirm that the purchase order has been updated and approved.

e In Salesforce, close the assigned task.

PROCESS **Create or Update Recovery Plan**
Recovery Assistant, Recovery Coordinator, Recovery Partner