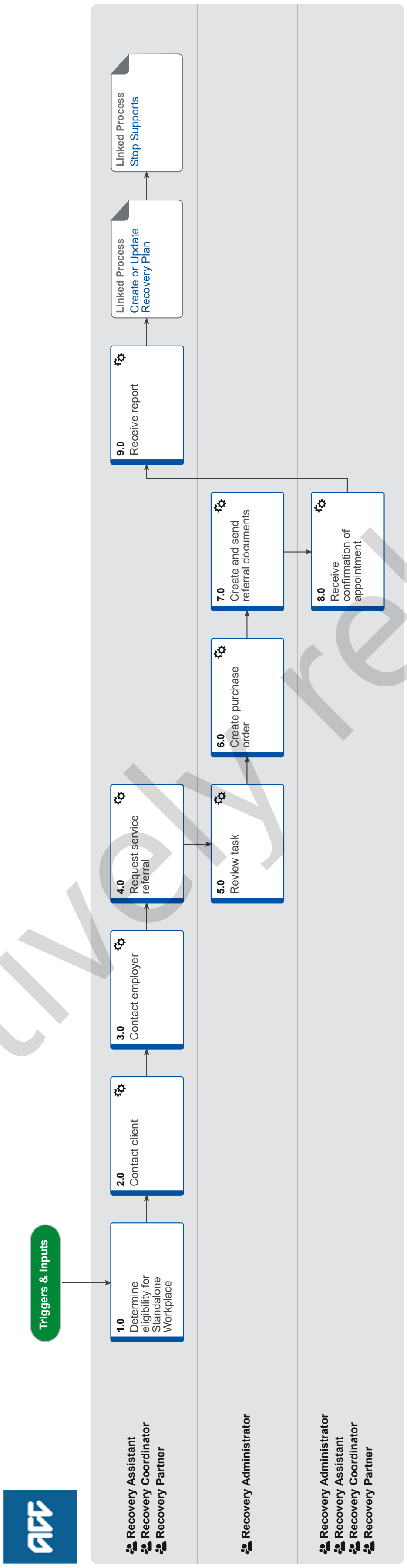
Set Up Standalone Workplace Assessment v16.0



Set Up Standalone Workplace Assessment v16.0

Summary

Objective
To understand all aspects (tasks and functional requirements) of the client's pre-injury role.

Background
The Standalone Workplace Assessment service is part of the Vocational Rehabilitation Services (VOC) contracts. For details of these contracts refer to the service page in Promapp.

The Standalone Workplace Assessment service is for those clients who need specialised assistance to return to work with their current employer. The provider will tailor the service to accommodate each client's specific needs and address any barriers to achieving an early and sustainable return to work. This service is only for those entitled, or likely to be entitled to weekly compensation.

For more details, refer to the Standalone Workplace Assessment service page.

Owner [Name withheld]

Expert

Procedure

1.0 Determine eligibility for Standalone Workplace Assessment

Recovery Assistant, Recovery Coordinator, Recovery Partner

a Review information on providing the Standalone Workplace Assessment service, including what's involved and any prerequisites.

- Gather Additional Information or Advice

NOTE **Where do you find information about this service?**
Refer to Standalone Workplace Assessment Service Page and Vocational Rehabilitation Services Overview (VOC) Service Page.

- Standalone Workplace Assessment Service Page
- Vocational Rehabilitation Services Overview (VOC) Service Page

b Confirm the client's eligibility for the Standalone Workplace Assessment service.

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

2.0 Contact client

Recovery Assistant, Recovery Coordinator, Recovery Partner

a Contact the client or authority to act (ATA) by their preferred method of communication.

NOTE What if you are unable to contact the client?

1) Attempt a maximum of two contacts over two full working days before leaving a voicemail or sending a notification to request client contact.

2) If you are unable to reach the client, extend the task for an additional two working days and note in the task description that this is the second attempt to contact the client.

3) On the task due date and if there has been no response from the client to the voicemail or notification, send the CM04 - Advise client that you were unable to reach them by phone letter.
The CM04 letter will be populated with client injury details, however you need to update the letter as follows:

'We recently tried to contact you about your injury that happened on [date of accident auto].
I tried calling you to talk about how we may be able to help you recover from your injury/injuries, but haven't managed to get in touch.
It would be good to hear from you on how you are progressing or discuss what other support we could offer, please give me a call or email me to arrange a convenient time for me to call you back.'

4) Extend the task date as appropriate to take into account postal delivery and note in the task description this is the third attempt to contact the client and the CM04 letter has been sent.

5) On the task due date and if there has been no contact from the client and they are continuing to receive support, seek internal guidance to determine next steps.

6) If you're in Partnered and no contact is made with the client after 3 attempts, you must contact the Provider, GP or other verified contact on the claim.

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

Identity Check Policy

c Check that 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?

You will need to obtain the client's authority to collect medical and other records. Go to (NGCM) Obtain Client Authority to Collect Information.

PROCESS Obtain Client Authority to Collect Information

d Discuss the following with your client:

• why you are recommending them for this service and a reminder of their rights and responsibilities
• the intended outcome of the service is a comprehensive report detailing the employment tasks and the functional requirements of the specified role.
• an onsite workplace assessment is required as part of the service.
• the client is not required to be present at the assessment but can choose to be present as an observer and are welcome to have a support person accompany them.
• the assessment includes engagement with their employer. Advise the client that you will be contacting their employer to discuss the Standalone Workplace Assessment service. Advise the client that if you cannot reach the employer by phone, you will send this information by email if we have a verified email address for the employer.

Client Legislative Rights and Responsibilities Policy

NOTE What if you have already discussed the service with the client?

During Welcome Conversation or a Recovery Check-in conversations you may already have discussed the service with the client and agreed to it. If that is the case, you don't need to contact them again.

e Confirm your client understands the purpose of the service and agrees to participate.

NOTE What if the client does not agree to participate?

Find out why the client does not want to participate and consider their reasoning and alternatives. Go to (NGCM) Seek Internal Guidance if your unsure how to proceed.

PROCESS Seek Internal Guidance

Decline Entitlement When Client is Non-compliant Policy

f Advise the client:

• the Provider will contact them to schedule an appointment
• the Provider will send ACC a report

g Check if the client requires a copy of the report

NOTE What if the client wants to receive reports?

Record this in the Vocational Life area in the Recovery Plan.

h 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.

Manage Participants (Eos Online Help)

Contracted Suppliers by Geographic Area of Coverage

i In Salesforce, record the conversation as a contact on the claim.

3.0 Contact employer

Recovery Assistant, Recovery Coordinator, Recovery Partner

a Contact the client's employer to discuss the following:

• the client has agreed to a Standalone Workplace Assessment
• the intended outcome of the service is a comprehensive report detailing the employment tasks and the functional requirements of the specified role
• advise the employer the service requires an onsite workplace assessment
• whether the client wishes to attend the onsite workplace assessment

NOTE **What if you are unable to reach the employer by phone?**
1) Attempt a maximum of two contacts over two full working days
2) If you are unable to reach the employer after two full working days, and if there is a verified email address for the employer party, email the employer with the information in points a and b along with an invitation to call or email ACC if they have any questions or concerns.
3) If there is no verified email address to notify the employer – but we are satisfied that the referral for Standalone Workplace Assessment is urgent ie. job is at risk, we can send the referral. When sending the referral we need to be very clear that the employer has not been notified so the Standalone Workplace Assessment Provider is aware.

b Confirm the employer understands the purpose of the service and agrees to participate.

c Advise the employer the Provider will contact them to schedule a Workplace Assessment.

d Check if the client and employer have a preferred Provider.

NOTE **What if the client and employer have different preferred Providers?**
The client's preference takes precedence. Advise the employer you are unable to accommodate their preference.

e In Salesforce, record the conversation as a contact on the claim.

NOTE **What if the request is required in the future?**
If the support is required in the future, set a reminder task for the future date when the support will be required.

When the reminder task is due return to activity 4.0 Request service referral.

Review the contract timeframes and SLAs as specified in the service page.

f Add the Agreed Intervention to the Recovery Plan.

NOTE **What if you are unsure how to add an Agreed Intervention?**
Go to (NGCM) Create or Update Recovery Plan.
PROCESS Create or Update Recovery Plan

4.0 Request service referral

Recovery Assistant, Recovery Coordinator, Recovery Partner

a In Eos, find all the documents that need to be sent along with the referral.

NOTE **What documents do you send with the referral?**
• Most recent medical certificate
• Post-surgery operation notes, if applicable
• Any relevant medical information that would assist the client planning a return to work
• ACC188 Job Task Analysis form
• Any relevant vocational reports.

NOTE: Ensure you don't include any unnecessary sensitive personal information.

NOTE **What do you do if you don't have all the information to complete the referral?**
If you require further information, refer to Gather Additional Information or Advice.
Once you have requested the information required, create a reminder action, set the target date for when you expect to receive the information.

Gather Additional Information or Advice

b Perform privacy checks on documents.

Privacy Check Before Disclosing Information Policy

NOTE **What do you need to check?**
Check documents:
• are relevant to the referral
• do not contain any third-party information
• do not contain any other information that needs to be withheld, ie medical information or other sensitive.

For details on what checks you need to complete before sending documents out, refer to NG SUPPORTING INFORMATION Inbound and Outbound Document Checks.

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 Create a referral-specific document group enter 'Standalone Workplace Assessment' and todays date in the document group description field.

d Add the documents to the group.

NOTE **What if there are documents from other claims that are relevant to the assessment?**
When a request for a referral is required and the supporting documents are on another claim, it is important to transfer the documents to the relevant claim. This will ensure the right documents support the recovery decisions for each claim.

To transfer documents from one claim to another:

• Create a bulk print of all documents on the other relevant claim and complete mandatory fields and description
• Open PDF document from email link
• File the PDF away to the relevant claim
• Repeat these steps if there is relevant documents on multiple relevant claims

The PDF should also be renamed something short but relevant, and identify which claim number the information came from, so it is included/printed in further referrals or copy files. E.g. Medical records and reports from claim: 100XXXXXXXX
Please do not create a bulk print on one claim and then move it to another claim, renaming it and using it in a referral for advice as it will not appear in any file copy subsequently used.

Manage document groups

e Generate a Vocational Rehabilitation referral task to Recovery Administration for a 'Standalone Workplace Assessment' service.

NOTE **How do you generate and send a referral task to Recovery Administration for a Standalone Workplace Assessment service?**
Go to NGCM Creating Manage Referral Tasks - System Steps

Creating Manage Referral Tasks - System Steps

Contracted Suppliers by Geographic Area of Coverage

NOTE **What information do you need to include in the task/e-form**
Please see Manage Referral Task Templates - For further information and guidance.

Manage Referral Task Templates

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.

f Complete all the mandatory fields and any additional information to be included in the ACC8004 referral form.

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 for more information on how information is disclosed.

Disclosure of Care Indicator Information to Third Parties Policy

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 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 NG PRINCIPLES Working in the Administration Team.

Principles of Working in the Administration Team

6.0 Create purchase order

Recovery Administrator

a In Eos, generate a Purchase Order for the specified referral and use the entitlement type:VR01.

Creating purchase orders using general + QE

NG GUIDELINES Purchase Order Details - Standalone Workplace Assessment

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

b Identify and select the vendor.

NOTE **Does your client or employer have a preferred vendor?**
Select the vendor from the Geographic Location search.

If your client has an existing relationship with a previous vendor who was involved in their rehabilitation, then note the preference.

Then load the “vendor/provider” as a participant. This enables Recovery Admin to validate the email and then email the purchase order directly from Eos if required.

The Recovery Team Member must ensure all known participants are loaded on the file and then removed when no longer relevant.

Manage Participants (Eos Online Help)

NOTE **What if the purchase order requires a higher delegation?**
Refer to the 'Request Authorisation for a Purchase Order - System Steps'.

Request Authorisation for a Purchase Order - System Steps

c Locate the contracted vendor via the Geographic Location search, once selected add the vendor as a 'Vendor - Contracted' participant in Eos.

Contracted Suppliers by Geographic Area of Coverage

Service Contracts and Contracted Providers - MFP spreadsheet

NOTE **What if a vendor has not been specified?**
If no vendor has been specified, select an appropriate contracted vendor for the referral type and client's geographic area.

d Approve the purchase order.

NOTE **What if you get a limited payment error message when authorising the purchase order?**
If you have received a request to amend a purchase order or create a purchase order for client reimbursements, change the limited payment indicator.

1). In Eos, go to the 'Validations' tab, select 'Edit' and update the Limited Payment List Indicator to 'No'.
2). Select 'OK'.
3). Go back to the purchase order to authorise.

Once you have authorised the purchase order and notified the vendor please remember to change the Limited Payment List Indicator to 'Yes'.

7.0 Create and send referral documents

Recovery Administrator

a Create the referral for the Standalone Workplace Assessment.

Admin Template - ACC8004 Referral for vocational rehabilitation review – vendor

b Populate with any extra information noted on the referral task.

c Check the task to ensure all relevant information is captured before you exit the document.

NOTE **What does a quality referral look like?**
Refer to Admin Template - Standalone Workplace Assessment Referral.

d Ensure you have completed the document (to convert the document into a non-editable pdf).

e Link the referral to the document group 'Standalone Workplace Assessment'.

f Perform privacy checks using Inbound and outbound document checks.

NG SUPPORTING INFORMATION Inbound and Outbound Document Checks

g Create an email using the Requests and referrals template, attach the referral and documents from the group and select the most appropriate email address (commonly listed under General Purchasing).

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

h Send the referral to the vendor.

NOTE **What if the Vendor requires the documents to be sent via courier?**
Go to Prepare and Send Client Information by Courier process.
PROCESS Prepare and Send Client Information by Courier

i In Salesforce, close the assigned referral task.

8.0 Receive confirmation of appointment

Recovery Administrator, Recovery Assistant, Recovery Coordinator, Recovery Partner

a Receive confirmation of the appointment from the Provider and file the email away to Eos.

NOTE **What if the Provider is unable to accept the referral?**
If the Provider is unable to accept the referral, locate the original purchase order and update with the new provider. Resend the referral to the new provider and await confirmation of the appointment and file the email away to Eos.

NOTE **What if the client fails to attend the Standalone Workplace Assessment appointment?**
If the client fails to attend or take part in the Standalone Workplace Assessment, you should find out why.
In some cases you may need to decline their entitlement.

Decline Entitlement When Client is Non-compliant Policy

9.0 Receive report

Recovery Assistant, Recovery Coordinator, Recovery Partner

a Receive notification that the ACC5945 Standalone Workplace Assessment report has been received and attached to the claim.

NOTE **What will the Standalone Workplace Assessment Provider submit to ACC?**
Providers are expected to submit a report using the ACC5945 Standalone Workplace Assessment form.

ACC5945 Standalone Workplace assessment

b Review the report. Refer to the Standalone Workplace Assessment service page for guidance.

Standalone Workplace Assessment Service Page

c Perform privacy and relevancy checks on the report.

NG SUPPORTING INFORMATION Inbound and Outbound Document Checks

d Discuss with the Provider any questions you have and agree on a timeframe for completing an amended report, if required.

e Contact the client and confirm you are speaking with the right person by asking ACC's identity check questions.

Identity Check Policy

f Discuss report and next steps with client.

g If required, provide a copy of the report to the client, as per their preferred contact method and obtain their confirmation that it is an accurate record of their workplace and job tasks.

NOTE **Can you send the Standalone Workplace Assessment report to an employer?**
Do not send the full Standalone Workplace Assessment report to the employer as it contains client's health information. For what to send to the employer, refer to Disclosure of Clients' Health Information to Employers Policy.

Disclosure of Clients’ Health Information to Employers Policy

NOTE **What if the client requests that the report is changed or incorrect?**
A client can request that information held by ACC is changed or updated if it is factually incorrect (ie: wrong DOB, incorrect name spelling etc). If it is the opinion of an assessor or Provider, the client can supply a 'statement of correction' to ACC which is then included with the report. This means that any time the report is sent out, the statement of correction must be sent as well.

Refer to Managing a client’s request to change personal information.

Managing a client’s request to change personal information

h In Salesforce, add a contact note as a record of the conversation.

i Update the Recovery Plan with the outcome of the intervention.

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

PROCESS **Stop Supports**
Recovery Assistant, Recovery Coordinator, Recovery Partner