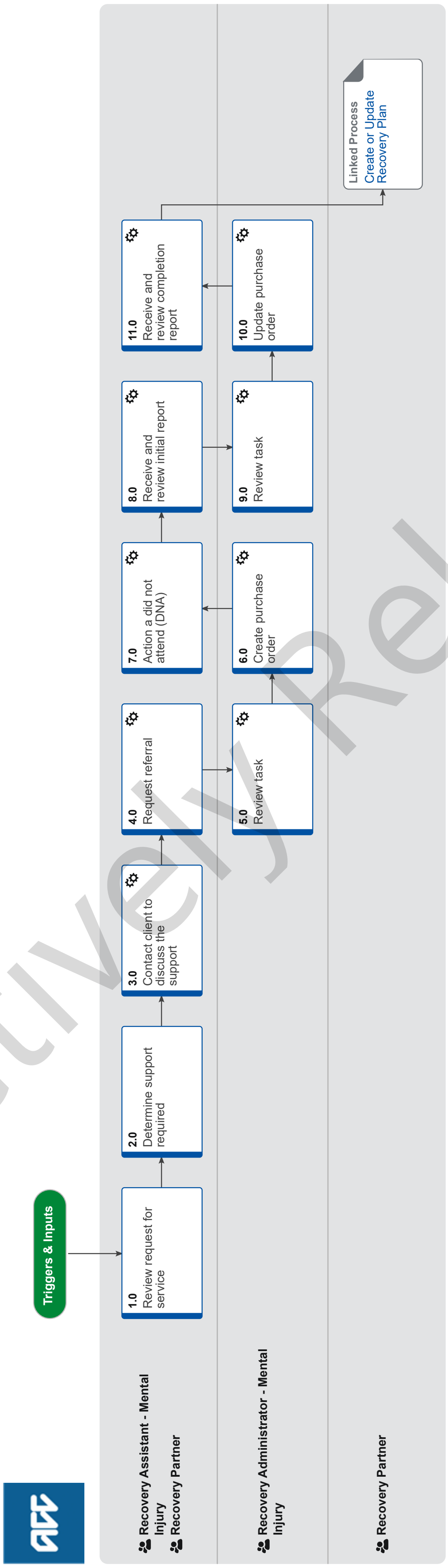
# Set Up Training for Independence & Advisory Service for Sensitive Claims v10.0



# Set Up Training for Independence & Advisory Service for Sensitive Claims v10.0

## Summary

**Objective**
To set up Training for Independence (TI) and Advisory Service programmes to support sensitive claim client's needs.

**Background**
The Training for Independence (TI) and Advisory Service programmes provide education, support, training, and rehabilitation to clients in the most appropriate setting for the client, eg their own home, a long term residential facility (that is not a rehabilitation facility), rest home, community, school, workplace, or remotely via tele-rehabilitation.

The Training for Independence services aim to:
• restore the client's independence, resilience and participation to the maximum extent practicable and ability to participate in their wider community as much as possible
• reduce the client's need for further rehabilitation and support services.

Training and coaching can also be provided to the client's family and carers where appropriate to assist the client with their rehabilitation goals.

**Owner** Name Withheld

**Expert** Name Withheld

## Procedure

### 1.0 Review request for service
**Recovery Assistant - Mental Injury, Recovery Partner**

**a** Review the request for Training for Independence (TI) or Advisory Service.

**NOTE** **How can a request be made?**
• Client or provider request/discussion for further independence
• Social rehabilitation assessment or reassessment
• Medical report, eg an acute hospital admission discharge report
• Recommendation from another relevant assessment/service eg Neuropsychological Assessment, Concussion Service, Psychiatric Services, clinical psychologist report
• ACC7419 Training for Independence Request form
• ACC2126 Training for Independence Completion report.
• ACC6428 Client Wellbeing Plan
• ACC6429 Supported Assessment
• Incapacity assessments
• ISSC report

**b** Review the client's rehabilitation history to gain an understanding of their past rehabilitation input and outcomes.

**NOTE** **What should you review on the claim?**
• Supports received under ISSC eg treatment, social work, active liaison
• Training for Independence Completion reports
• Previously completed assessments.

**NOTE** **What do you need to consider when the support 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 Determine support required
**Recovery Assistant - Mental Injury, Recovery Partner**

**a** Use the Training for Independence Decision Guide to determine the clients eligibility.

Training for Independence Decision Guide

**NOTE** **What if you need additional information to inform your decision?**
Contact providers and/or the client to gather the information. Use the ACC7419 Training for Independence Request form to guide you on what information you need to gather, or if needed, ask the provider to complete the form.

ACC7419 Training for Independence Request

**NOTE** **What if you need more information on TI programmes offered?**
Refer to the the relevant TI or Advisory Service Pages below.

Training For Independence Services Service Page

TI or TIAS Programme Selection Service Page

**NOTE** **What if you are unsure about the need for a TI?**
Seek advice from Recovery Support.
**PROCESS** Seek Internal Guidance

**b** Consider other options available to the client.

**NOTE** **What are the other options available to the client that are specific to social supports?**
Depending on the client's identified needs, it may be more appropriate to provide other options in addition to, or instead of, a TI programme, such as:
• Living my Life support service
• Vocational Rehabilitation
• Equipment
• ISSC Support Service eg social work support.

It's important to consider the timing of other services in relation to any TI programme provided, so that the services provided are co-ordinated.

**c** Determine if a TI is appropriate for the client.

**NOTE** **What if the client has had more than 6 months of TI service, or there has been a TI Service in the last 12months?**
If the claim is in Assisted or Supported Recovery , you must seek clinical guidance regarding the appropriateness of a further TI service. Try the hotline in the first instance, however if required you may need to send a written request. If the claim is in Partnered Recovery, clinical advice may be considered but is not mandatory. In all cases, please refer to the delegations framework regarding approval cost delegations.

**NOTE What if the request is declined?**
1) Contact the requestor or the preferred contact person and explain how this decision was made.
2) Advise other options eg obtaining support from their GP, Ministry of Social Development or the DHB.
3) Explain their right to review the decision and the time-frames for this.
4) Advise that they can contact the Citizens Advice Bureau for independent support and advice.
5) Create and send the decline letter (TFI02 Training for Independence - decline) to the client.
This process ends.
**PROCESS** Issue Recovery Decision

TFI02 Training for Independence - decline

NGCM - FINAL Emailing from Eos - System Steps

NG Principles Decision Making

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## 3.0 Contact client to discuss the support

**Recovery Assistant - Mental Injury, 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?**
• Attempt a maximum of three contacts over three full working days before leaving a voicemail or sending a notification to request client contact.

• If no contact is made with the client after three attempts, you must contact the Lead 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 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 Obtain Client Authority to Collect Information. Once authority has been received, return to this process and continue.
**PROCESS** Obtain Client Authority to Collect Information

**d** Discuss the referral for the TI programme with the client.

**NOTE What do you discuss with the client?**
Why you are recommending them for this service and a reminder of their rights and responsibilities.

TI is for clients who have injury-related needs that can be met by:
• education of the client and their family/whānau/carers about the impact of the injury
• training and coaching, eg: energy conservation and how to manage fatigue, behaviour, health, budgeting and hygiene
• developing social and communication skills and establishing social confidence
• identifying and managing any injury-related risks and teaching how to manage these risks safely, eg a person living alone may have rugs or electrical cords on the floor
• engaging the client with community-based activities and teaching them skills to be able to access these activities safely, appropriately and independently
• rebuilding a client's confidence by increasing independence with daily tasks, such as self cares, mobility, household management, childcare and transport
• promoting healthy choices about lifestyle, which may include education around drugs and alcohol, exercise and nutrition.

• the provider will be in touch to arrange the support
• they are able to have a support person with them
• the provider will send ACC a plan which will includes goals and support required, updates on progress made toward these goals and if the plan changes, as well as a completion report.
• approval is gained from ACC to deliver the programme

Client Legislative Rights and Responsibilities Policy

**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, consider their reasoning and alternatives. Record this as a contact on the claim. If you are unsure how to proceed go to Seek Internal Guidance.
**PROCESS** Seek Internal Guidance

**f** Confirm if the client wants to receive copies of the reports. Record their response in the Social Life area of the Recovery Plan.

**g** 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, confirm the Provider is contracted for this service and add them 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)

**h** In Salesforce, record the conversation as a Contact Action on the claim.

**NOTE What if the request is required at a future date?**

Set a reminder task for the future date when the support will be required or add a note to the next Recovery Check In.

When the reminder task is due return to continue this process and continue.

i Add the Agreed Intervention to the Recovery Plan.

**NOTE What if you are unsure how to add an Agreed Intervention?**

Refer to Create or Update Recovery Plan.

**PROCESS** Create or Update Recovery Plan

## 4.0 Request referral

**Recovery Assistant - Mental Injury, Recovery Partner**

a Check if there are documents on other claims relevant to the referral.

**NOTE What if there are relevant documents on other claims?**

Create a copy and transfer to the other claim:

1) Create a bulk print of documents on the other claim, complete mandatory fields and add a description.
2) Open PDF document from email link.
3) File the PDF away to the claim you are creating the referral on.
4) Repeat these steps if there are documents on other claims.

Provide a short and descriptive title to the document properties in the PDF and state the claim number the information came from eg Medical records and reports from claim: 100XXXXXXXX

Do not create a bulk print on one claim and move it to a different claim as it will not appear in any file copy requested by the client.

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 (recoveryadmin1@acc.co.nz) and include the document to be redacted plus your redaction instructions.

c In Eos, create a document group 'Training for Independence' and add documents to the group.

Manage document groups

d In Eos, generate a 'NGCM - Manage Referral' task for either 'Training for Independence' or ' Advisory Services' using the System Steps below. Select 'Social Rehabilitation' as the referral category, then 'Training for Independence' as the Social Rehab referral type.

Creating Manage Referral Tasks - System Steps

**NOTE What information do you need to include in the task?**

Refer to the 'Manage Referral Task Templates document

Besides referring this as a TI for Adults with a Sensitive Claim, no further sensitive claims information should be included in the referral ie details of the events. Such information should instead, be included in supporting documents once a key worker is assigned.

Manage Referral Task Templates

NG GUIDELINES Purchase Order Details Training for Independence Sensitive Claims Service

Referring Tasks to Recovery Administration - Principles

Disclosure of Care Indicator Information to Third Parties Policy

e Generate NGCM Admin Request Task using the template Prepare and Complete Sensitive Claims Document Release (Provider Only).

**NOTE How do you send the document group to Administration?**

Go to Prepare and Complete Sensitive Claims Document Release (Provider Only), then return to this process and continue.

**PROCESS** Prepare and Complete Sensitive Claims Document Release (Provider Only)

f Consider the timing of support/referral task. The referral tasks route to the admin team with an SLA of 24 hours.

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

1) Call Recovery Administration.
2) Discuss with the Recovery Administrator the urgency and advise the claim number.
3) The Recovery Administrator will open the claim in Eos and find the task on the claim.
4) 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 support is required in the future, edit the task target date to a future date. Consider the contract timeframes and SLAs as specified in the service page.

## 5.0 Review task

**Recovery Administrator - Mental Injury**

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?**

Refer to NG PRINCIPLES Working in the Administration Team document below.

Principles of Working in the Administration Team

**NOTE What if a preferred vendor has not been selected?**

Use the Contracted Suppliers by Geographic Area of Coverage to search for a vendor, confirm the vendor is contracted for this service.

- Contracted Suppliers by Geographic Area of Coverage

**NOTE** **What if the request is to update a current purchase order?**
Go to Activity 9.0 Review task and continue.

**c** Call the vendor to determine if they have capacity to accept the referral before generating the purchase order. This needs to be done even if a preferred vendor has been requested.

**NOTE** **What if you are unable to contact the vendor?**
1) Locate another vendor from Contracted Suppliers by Geographic Area of Coverage.
2) Call or email the vendor to determine if they have capacity. Push task out 2 working days to allow for a response.
3) Repeat until a vendor confirms they have capacity to accept the referral.

- Contracted Suppliers by Geographic Area of Coverage
- Service Contracts and Contracted Providers - MFP spreadsheet

**NOTE** **What if you have not been able to confirm capacity to accept referral from a vendor?**
Call the Recovery Partner to advise that all vendors in the region have been contacted and none are available, then close task.

**d** In Eos, add a contact note detailing the discussion.

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## 6.0 Create purchase order

**Recovery Administrator - Mental Injury**

**a** In Eos, generate and approve the Purchase Order for the specified referral.

- Purchase Order - Handy Hints on how to create and edit POs
- Creating purchase orders using general + QE
- Create a purchase order
- NG GUIDELINES Purchase Order Details Training for Independence Sensitive Claims Service

**NOTE** **What if the client has selected a preferred vendor?**
Match the vendor id of the preferred vendor with the named vendor in the task.

**NOTE** **What if the client has not selected a preferred vendor?**
1) Confirm that the vendor id (who advised capacity) matches the vendor id in Eos using Contracted Suppliers by Geographic Area of Coverage.
2) Add the vendor as a participant to the claim.

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

**b** Generate the ACC2134 Training for independence referral and add additional information received in the task to the ACC2134. For guidance refer to the Admin Template - Training for Independence Referral.

- Admin Template - Training for Independence Referral

**c** Check that no further sensitive claims information is included in the ACC2134. Remove any mention of sexual abuse and replace it with 'mental injury'.

**d** Complete the document to convert it into a non-editable PDF.

- Principles of Working in the Administration Team

**e** Locate the document group 'Training for Independence' and create a bulk print of the document group.

- Print documents

**f** Perform privacy checks on the documents in the bulk print.

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

**g** Generate a password for the document group 'Training for Independence'.

- Random Password Generator.xls

**h** Apply the password to the bulk print and add the password as a contact on the claim.

**i** Create an email using 'Requests and referrals' template and include the following in your email:

Kia ora,

Please find attached a Training for Independence/ Advisory Services referral and relevant documents. This is part # of # emails.

To open the password protected attachment:
1. Have the assigned keyworker call Recovery Administration on 0800 735 566
2. Double click on the PDF file
3. Enter the password provided by Recovery Administration.

If you need any assistance with accessing the PDF file, please call us on 0800 735 566 ext. 87879

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

**NOTE** **What if the document is too large to send in a single email?**
Split the bulk print document into 10Mb sized files. Label emails 'This is part # of # emails'.

**j** Link the ACC2134 and the bulk print to the email.

**k** Check the password opens all of the password protected documents attached to the emails.

**l** Send the email to the vendor.

**m** In Salesforce, close the referral task.

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## 7.0 Action a did not attend (DNA)

**Recovery Assistant - Mental Injury, Recovery Partner**

**a** Receive notification from Vendor that the client did not attend a scheduled appointment.

**NOTE** **What if the vendor advises that the client failed to attend the TI or Advisory Service appointment?**
When a client fails to attend a scheduled appointment without giving at at least 24 hours prior notice, a DNA can be paid.
• A DNA report must be provided
• A maximum of three non-attendance fees can be paid per client with a maximum of two hours per non attendance.

**NOTE** **What if a DNA report is not provided by the provider?**
Contact the provider and request the DNA report.

**b** Contact the client or preferred contact person and confirm you are speaking with the right person by asking ACC's identity check questions.

Identity Check Policy

**c** Discuss the situation to identify if there is a reasonable explanation. Remind the client of their rights and responsibilities and address any injury related barriers to attending future appointments.

**NOTE** **What if the client explanation is not reasonable?**
Consider the Manage Non-Compliance process.
**PROCESS** Manage Non-Compliance

**d** In Salesforce, record the conversation as a Contact Action on the claim.

**e** Create task - NGCM Edit Manage Referral Purchase Order. Select the referral category 'Social Rehabilitation Referrals'.

**NOTE** **What information do you need to include in the task?**
• Purchase order number.
• Service code:
• TIDND (Sensitive Claims)
• TIADNA1 (Advisory Services Short Term)
• TIADNA2 (Advisory Services Long Term)
• Date of the missed appointment.

Referring Tasks to Recovery Administration - Principles

## 8.0 Receive and review initial report

**Recovery Assistant - Mental Injury, Recovery Partner**

**a** Receive notification that the initial report and costing sheet from vendor has been attached to the claim.

**b** Review the initial report and costing sheet.

**NOTE** **What if there is a request to fund a gym membership or pool pass?**
Payment for recreation or participation in social activities including payment for membership fees for any club or organisation including gym memberships and pool passes are excluded under the TI services. If a request is received this will need to be considered under the 'Other' Social Rehabilitation criteria below.
**PROCESS** 'Other' Social Rehabilitation Policy

**c** Perform Privacy and Relevancy checks on the received report.

NG SUPPORTING INFORMATION Inbound and Outbound Document Checks

**d** Action recommendations in the report.

**NOTE** **What if the initial report is not acceptable?**
Contact the provider to discuss any questions you have and agree on a timeframe for completing an amended report. In Salesforce, record the conversation as a Contact Action on the claim.

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

**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
• codes
• units
• provide the key worker name.

## 9.0 Review task

**Recovery Administrator - Mental Injury**

**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

## 10.0 Update purchase order

**Recovery Administrator - Mental Injury**

**a** In Eos, locate and update the Purchase Order as per the task.

**b** Approve the Purchase Order.

**NOTE** **What if you do not have the delegation to approve the Purchase Order?**
Save the Purchase Order. Create and send a Request Authorisation task to a Recovery Administration Leader for a Purchase Order approval.

Refer to the link below for further information.

Request Authorisation for a Purchase Order - System Steps

**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 List 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, change the Limited Payment List Indicator to 'Yes.

**c** Create an email, copy and paste the 'Extension or change PO' email template into the email.

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

**d** Edit the template.

**e** Send the email to the vendor.

**f** In Salesforce, close the assigned Edit Manage referral purchase order task.

## 11.0 Receive and review completion report

**Recovery Assistant - Mental Injury, Recovery Partner**

**a** Receive notification that the completion report from provider has been attached to the claim.

**b** Perform Privacy and Relevancy checks on the completion report and review Outcomes, variation and completion reporting.

NG SUPPORTING INFORMATION Inbound and Outbound Document Checks

**c** Review the report.

**NOTE** **What if the goals have changed?**

1) Check Eos to see if the Provider has submitted a Variance report. Contract states: “Variance Report” means a report submitted to ACC by the Supplier when variation occurs detailing; the
specific outcome and steps/strategies where progress is not being made, reasons for the lack of progress or variance, actions being taken or to be taken to resolve the variance, and implications of the variance.
2) Contact the Provider and discuss.
3) Request they resubmit the report, if appropriate.
4) In Salesforce, record the conversation as a Contact Action.

**NOTE** **What if you disagree with the recommendation?**

1) Contact the Provider to discuss.
2) In Salesforce, record the conversation as a Contact Action.
3) Issue the relevant decline decision letter. If you are unsure of what letter to use, contact a Practice Mentor.
This process ends.

**d** Consider the report recommendations.

**NOTE** **What if you agree with the recommendations?**

1) Contact client and discuss other options ie a further TI programme, also you might consider referrals for Pain Management, Specialist Assessment, etc.
2) In Salesforce, record the conversation as a Contact Action.
3) Update the Recovery Plan.
4) Send the relevant Purchase Order task to Recovery Administration.

**NOTE** **What if request is for an extension of the TI service?**

Seek Technical guidance if the client has had more than six months of a TI programme or total over $35,000 as noted in 2.0c.

**PROCESS** Seek Internal Guidance

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**PROCESS** **Create or Update Recovery Plan**
Recovery Partner

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