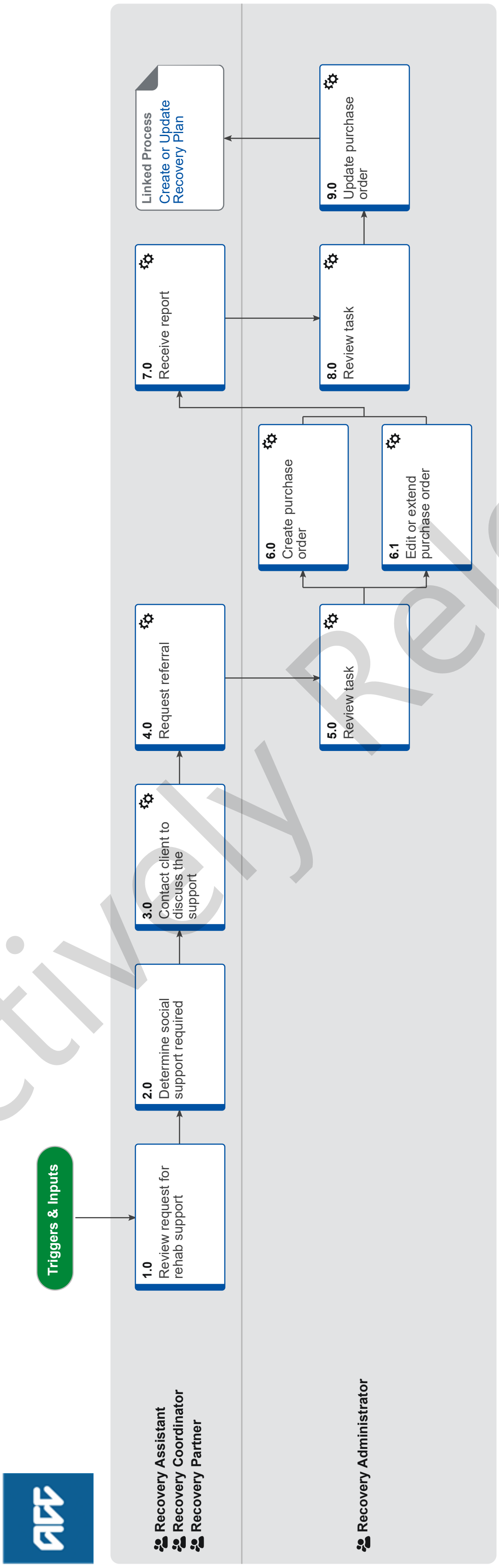
Set Up Training for Independence & Advisory Service (PI) v28.0



Set Up Training for Independence & Advisory Service (PI) v28.0

Summary

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

Background
The Training for Independence (TI) and Training for Independence Advisory Service (TIAS) 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 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 rehab support
Recovery Assistant, Recovery Coordinator, Recovery Partner

a Review the request for rehab support.

NOTE **What types of request for support may be received?**
The request could be a:
• Client request/discussion for further independence
• Social rehabilitation assessment or reassessment
• Medical report, eg an acute hospital admission discharge report, the ACC705 Referral for Support Services on Discharge, the ACC706 - Early Notification of Complex Case or General Practitioner's report
• Recommendation from another relevant assessment/service, eg Neuropsychological Assessment, Concussion Service, Psychiatric Services, clinical psychologist report etc.
• ACC7419 Training for Independence Request form
• ACC2126 Training for Independence Completion Report

ACC7419 Training for Independence Request

NOTE **What if you have received an ACC7435 (Direct referral for an adult discharging from a TBI Residential Rehab (TBIRR) facility)?**
The TI-Te Ata Pō contract enables TBIRR suppliers to refer to a TI provider without the need for obtaining ACC approval.

If a TBIRR supplier has referred the client for a TI service, ACC do not need to send a referral, and will receive the plan and quote from the TI supplier as normal.

A purchase order is not required until the plan and quote is received, and providers can bill ACC for planning time without a purchase order. Proceed to 7.0 when the quote is received.

As the referral has been made by the TBIRR supplier, some documents held by ACC may not have been made available with the referral. This should be discussed with the TI key worker to ensure they have any appropriate information, reports, or notes.

Training for Independence - Te Ata Pō service schedule

b Review clients rehabilitation history to gain an understanding of past rehabilitation input and outcomes.

NOTE **What should you review on the claim?**
Training for Independence Completion reports
Previously completed assessments
Previous and current supports

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 Determine social support required
Recovery Assistant, Recovery Coordinator, Recovery Partner

a Use the TI decision guide to determine the clients eligibility

Training for Independence Decision Guide

NOTE **What if you need more information on Training for Independence and the types of programmes offered?**
You can use the Service pages below to find out more information

Training for Independence Services

TI or TIAS programme selection

NOTE **What if you are unsure about the need for TI or TIAS?**
Seek advice from Recovery Support or consider if a Social Rehabilitation Needs Assessment is needed.
PROCESS Seek Internal Guidance

Social rehabilitation assessment

b Consider other options available to the client.

NOTE What are the other options available to the client that are specific to social support?

Depending on the client's identified needs, it may be more appropriate to provide other option(s) in addition to, or instead of, TI or TIAS, such as:

• Integrated Home and Community Support services or Living my Life
• Vocational Rehabilitation
• Equipment, housing, vehicle modifications.

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

c Based on the information received and using the decision guide determine if Training for Independence Rehab Service or Training for Independence Advisory Service 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

If the claim is in Partnered Recovery , clinical advice may be considered but is not mandatory

Try the hotline in the first instance, however if required you may need to send a written request.

PROCESS Seek Internal Guidance

NOTE What to do if the request is declined?

1) Explain to the client how this decision was made.
2) Their options, such as getting support from their GP, Ministry of social development or the 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.

HCS999 Social Rehab decline decision - client

NGCM - FINAL Emailing from Eos - System Steps

NG Principles Decision Making

3.0 Contact client to discuss the support

Recovery Assistant, Recovery Coordinator, Recovery Partner

a Contact the client or 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 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

d Discuss the following with your client:

• why you are recommending them for this service and a reminder of their rights and responsibilities

TI or TIAS 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.

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 Advise the client:

• 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, variation (possibly) and completion reports.

g Check if the client requires a copy of the plan, variation (if applicable) and completion reports.

NOTE **What if the client wants to receive reports?**
Record this in the Social Life area in the Recovery Plan.
PROCESS Create or Update 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

Contracted Suppliers by Geographic Area of Coverage

i 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 continue this process.

j 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 referral

Recovery Assistant, Recovery Coordinator, Recovery Partner

a In Eos, check the following documents are on the claim (if applicable):

• Discharge reports from acute hospital services or specialist rehabilitation
• Recent medical information
• Current medical certificate
• Recent social rehabilitation assessments

NOTE **What if there is information missing?**
Go to (NGCM) Request Clinical Records. Once received, return to this process.
PROCESS Request Clinical Records

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

NOTE **What if there are douments on other claims?**
Create a copy and transfer to the other claim:

• Create a bulk print of documents on the other claim, complete mandatory fields and add a description
• Open PDF document from email link
• File the PDF away to the claim you are creating the referral on
• 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

c 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

d Create a document group titled 'Training for Independence ' or 'TI Advisory Service' and add the applicable documents to the group.

Manage document groups

e Generate a 'NGCM - Manage Referral' task for either 'Training for Independence' or 'Training for Independence Advisory Services' to Recovery Administration using the System Steps below. (Select 'Social Rehabilitation' as the referral category, then 'Training for Independence' as the Social Rehab referral type).

NOTE **What information do you need to include in the task/e-form?**
Refer to the 'Manage Referral Task Templates document. Ensure that the contract selection (Te Ata Tū, Te Ata Pō, Tamariki & Rangatahi) is specified in the "Additional Comments" field.

- Manage Referral Task Templates
- Creating Manage Referral Tasks - System Steps
- Referring Tasks to Recovery Administration - Principles
- Disclosure of Care Indicator Information to Third Parties Policy
- NG GUIDELINES Purchase Order Details Training for Independence Tamariki and Rangatahi Services
- NG GUIDELINES Purchase Order Details Training for Independence Te ata Po
- NG GUIDELINES Purchase Order Details Training for Independence Te ata tu Services

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?**
• 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 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

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
- Principles of Working in the Administration Team

NOTE **What if the request is to update the current purchase order?**
• If you required to update the current purchase order following the receipt of the initial report and costing sheet go to activity 8.0.
• If you need to update the purchase order for any other reason go 6.1 Edit or extend purchase order

- Referring Tasks to Recovery Administration - Principles

6.0 Create purchase order

Recovery Administrator

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

NOTE **What if this is a re-referral?**
Locate the original Purchase Order and continue with this process.

- Purchase Order - Handy Hints on how to create and edit POs
- Service Contracts and Contracted Providers - MFP spreadsheet
- Creating purchase orders using general + QE
- NG GUIDELINES Purchase Order Details Training for Independence Te ata tu Services
- NG GUIDELINES Purchase Order Details Training for Independence Te ata Po
- NG GUIDELINES Purchase Order Details Training for Independence Tamariki and Rangatahi Services

b Select vendor to provide services; If a preferred vendor has not been documented in the referral task identify and select a contracted Provider in the client's geographic area.

- Contracted Suppliers by Geographic Area of Coverage

NOTE **What if this is a re-referral?**
Update the original Purchase Order with the new Provider and continue with this process.

c Add the vendor as a 'Vendor - Contracted' participant in Eos.

- Manage Participants (Eos Online Help)

d Approve the Purchase Order.

NOTE **What if the purchase order requires a higher delegation?**
Refer to the system steps below.

- Request Authorisation for a Purchase Order - System Steps

e Select 'Add by doc' and generate and complete the ACC2134 Training for independence referral.

f Add additional information received in the task to the referral. For guidance refer to the Admin Template - Training for Independence.

- Admin Template - Training for Independence Referral

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

- Principles of Working in the Administration Team

h Perform privacy checks on the documents in the group.

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

i Create and send an email using 'Requests and referrals' template

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

NOTE **What if there is a document group?**
Open document group and link the ACC2134 to the group and email to the vendor.

NOTE What if the document 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

j In Salesforce, close the referral task.

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

6.1 Edit or extend purchase order

Recovery Administrator

a In Eos, locate the purchase order:

- click on “Search for a claim”
- select the “Purchase Order / ACC32 Number” tab
- paste the purchase order number into the 'purchase order number' field
- select “Open”.

b Update the purchase order using the following instructions:

- select "Add" to add a new line
- select the 'Intervention' then 'Ok'
- search for the purchase order code
- select 'Add to list' then 'Ok'
- add the information provided in the task then 'Ok'.

c Approve the Purchase Order.

NOTE What if the purchase order requires a higher delegation?

Refer to the system steps below.

Request Authorisation for a Purchase Order - System Steps

d Create and send an email using the 'Purchase Order Approval and Extension' template.

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

e In Salesforce, close the task.

7.0 Receive report

Recovery Assistant, Recovery Coordinator, Recovery Partner

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

b Review the report and costing sheet. - if above delegation or unsure about approval seek internal advice

Delegations Framework

NOTE What if the cost is above your delegation or you are unsure about the approval?

Seek internal guidance.

PROCESS Seek Internal Guidance

NOTE What if the vendor advises that the client failed to attend the Training for Independence or Training for Independence Advisory Service referral?

If the client fails to attend or take part in the Training for Independence or Training for Independence Advisory Service and there doesn't appear to be a reasonable explanation for not attending. Refer to the relevant Service Schedule for more information on what needs to be provided by the vendor and the relevant DNA code to be applied to the existing Purchase order.

PROCESS Manage Non-Compliance

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

NOTE What if you receive a request for change to programme eg extension of date or additional hours?

Programmes are expected to be completed with the specified programme plan and service delivery timeframe as set out in Training for independence Operational Guidelines

Providers should complete the Variation Report section of ACC2126 TI Report if there is a significant change or an event occurs that will change the normal course of the intervention phase. This may be due to a number of reasons, eg the Client has surgery or sustains a further injury.

NOTE What if the request is to approve or change a programme referred under the previous TI contract (Up to June 2023)?

Ensure the codes requested are in line with the previous contract, and ensure the "From date" of the approval is before 30th June 2023, including for non-attendance codes. For more information, refer to the Training for Independence Sharepoint site and FAQs.

NOTE What if the provider has requested funding for accommodation?

There is no purchase code for provider accommodation, as this should be vary rarely required. If a provider has to travel a substantial distance or time within their TLA and it would not be safe to return to base without stopping to rest, consider approving this funding using the non-contracted code ACCOM. This should not be used due to a supplier not having an appropriate provider within the client's area/TLA. If you are unsure, consult your Team Leader.

Training for Independence (Communications and Engagement Hub)

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.

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
• provide the key worker name

8.0 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

9.0 Update purchase order
Recovery Administrator

a In Eos, update the purchase order as per the NGCM edit task .

NOTE **What if the task is requesting changes or additional codes from a previous (Up to 30th June 2023) TI contract?**
Ensure that the referral was originally created before 1st July 2023, and refer to the "Training for Independence FAQ for RTMs" document on the Training for Independence Sharepoint site. If the purchase order was created on or after 1st July 2023, request clarification from the RTM.

Training for Independence (Communications and Engagement Hub)

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 Select 'Add documents' and generate and complete the 'TFI01 Training for Independence approval - client' with the ACC2126 Training for Independence Plan and 'ACC255 Working together factsheet' to the client by their preferred method of communication.

d Create an email using the 'Purchase Order Approval/ Extension' email template add the following into the email "We have approved/updated Purchase Order number (add Purchase Order number)
• date range
• codes
• provide the key worker name

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

e In Salesforce, close the assigned referral task.

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