

## Summary

### Objective

To enable clients who have been identified by ACC as requiring Transport or vehicle modifications to meet their injury-related needs to:

- get in and out of a vehicle safely and have freedom and safety of movement while in it
- safely drive or operate a vehicle
- travel safely as a passenger
- transport essential mobility equipment
- live as independently and safely as possible.

We accept or decline a vehicle grant based on the legislation, ACC policy, the assessor's report and the information we gather.

A vehicle grant is a contribution by ACC for purchasing a suitable vehicle for a client where standard modifications cannot be made to a client's existing vehicle.

### Background

Replacement vehicle or vehicle modifications can help clients live as independently as possible. ACC is responsible for assessing our client's injury related needs and providing the appropriate transport for independence options required to meet those needs. Depending on the client's injury related needs and the level of modifications required, we may:

- modify the client's existing vehicle - install hand controls, wheel spinners, modify seating
- contribute towards the purchase of a replacement vehicle that is more suited to modification
- provide a highly modified vehicle (a vehicle that has been modified to enable a person to drive or travel in the vehicle whilst in their wheelchair).

Our Vehicle Modification Service suppliers work with us, our clients, their family/ whānau and our contracted transport assessors to provide vehicle modifications that are appropriate, compliant and suitable for our clients' existing and future needs.

**Owner** Name Withheld

**Expert** Name Withheld

## Procedure

### PROCESS

### Arrange Transport for Independence Assessments Recovery Assistant, Recovery Coordinator, Recovery Partner

#### 1.0 Review TFI Assessment Report

Recovery Assistant, Recovery Coordinator, Recovery Partner

- Receive notification that the report is received and has been attached to the claim (Completed ACC4507 standard or an ACC4508 for specialised).
- Perform privacy and relevancy checks.
  - NG SUPPORTING INFORMATION Inbound and Outbound Document Checks
  - Privacy Check Before Disclosing Information Policy
- Check the quality of the report.

#### NOTE What if the Assessment Report is not of an appropriate standard?

Request further information if required, or discuss with the Assessor. If the initial report was incomplete, Assessors must resubmit the report at no extra cost to ACC.

#### NOTE What if the quality of the report(s) is still unsatisfactory?

Talk to the local Engagement and Performance Manager if there are ongoing issues with the quality of a vendor's reports.

- Read the report and understand what type of support is required:
  - Replacement vehicle purchase.
  - Client is a driver or passenger (front or back).
  - It's clear that the options are to meet the injury related transport needs.

#### NOTE What if anything needs to be clarified in the report?

Contact the assessor to get clarification on anything you're unsure of. If you need further help, talk to your Team Leader first, then refer to the Recovery Support Decision Tree to help determine next steps.

Recovery Support Decision Tree

Service Contracts and Contracted Providers - MFP spreadsheet

#### 2.0 Consider recommended options

Recovery Assistant, Recovery Coordinator, Recovery Partner

- Consider the options presented in the assessment.

#### 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

- Read the Vehicle Grants Policy and be familiar with what ACC can contribute to if a replacement vehicle is an option.

Vehicle Grants Policy

- Refer to the Delegations to check who can approve any of the recommended TFI options.

Delegations Framework

#### 3.0 Determine next steps for selected options

Recovery Assistant, Recovery Coordinator, Recovery Partner

- Based on the assessor report determine the next steps.


#### NOTE Where can you find more information on Transport for Independence Supports?

You can refer to the Transport for Independence Assessments Service operational guidelines.

**NOTE What if the assessor has recommended modifying the client's existing vehicle?**

Based on the quote received, determine if you're able to approve and the options are directly related to the client's injury and will assist in their rehabilitation or return to independence.

- If you agree with the options and are able to approve, proceed to requesting a purchase order (go to activity 5.0 in this process).
- If you're unable to approve, request approval from the delegation level specified in the Delegations document below.

 Delegations Framework

**NOTE What if the assessor has recommended purchasing a replacement vehicle without modifications?**

You will need to research what the recommended vehicle(s) would cost and when talking to the client, let them know that they will need to get a trade-in valuation of their existing vehicle from a local dealer.

**NOTE What if the assessor has recommended either a replacement vehicle or a replacement vehicle and modifying?**

When talking to the client you will need to ask them to obtain a valuation of their existing vehicle before proceeding and then determine what ACC's contribution to a replacement vehicle would be.

**NOTE How do you work out ACC's contribution for a replacement vehicle?**


Go to Vehicle Grants page on how to work out the contribution.


 Vehicle Grants Policy

- b** Approve the agreed option.

**NOTE What if the approval needs a higher delegation to approve?**

Refer to the Delegations to find out who can approve the support. If approval is needed from Technical Services, go to Seek Internal Guidance Activity 4.0 Request Written Guidance

 **PROCESS** Seek Internal Guidance

 Delegations Framework

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

 Transport for Independence Assessments Service Operational Guidelines

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### 3.1 Obtain approval for modification for Specialised TFI

Recovery Partner

- a** Obtain approval to proceed with the Specialised Transport for Independence option.

**NOTE How do you obtain approval to proceed for Specialised TFI?**

You will need to seek approval from a Technical Specialist. Go to the Seek Internal Guidance process, Activity 4.0 Request Written Guidance to submit the Vehicle Modifier Quotation for review, comment and approval to proceed to the modifications process.

 **PROCESS** Seek Internal Guidance

### 4.0 Contact client to discuss recommended options

Recovery Assistant, Recovery Coordinator, Recovery Partner

- a** On approval to proceed, contact the client to discuss the option(s).
- b** Confirm you are speaking with the right person by asking ACC's identity check questions.

 Identity Check Policy

- c** Explain any financial contribution that the client may need to make, if the option is a replacement vehicle, and let them know ACC can make a contribution. Refer to Engaging with the client and dealing with issues service page for more guidance on what to discuss with the client.

- d** Confirm with the client: Name of registered owner of the vehicle, and the registered owner has one of the following: Valid NZ Driver Licence, NZ Birth certificate, Valid NZ passport. Confirm owner postal address and phone number.

 Client Legislative Rights and Responsibilities Policy

- e** If ACC is contributing towards the purchase of a replacement vehicle, make sure you have received the ACC94 and the client understands their responsibilities.

- f** Advise the client that if ACC is contributing to the costs of a replacement vehicle, they will need to search for a suitable vehicle which has been identified in the assessor's report. Provide the client the ACC vehicle age and mileage guidelines. Let them know a Pre-purchase inspection needs to be carried out and ACC will fund this on receipt of an invoice.

**NOTE What are the client's options for purchasing a replacement vehicle for standard modifications?**

ACC will pay all injury related modification costs. For the purchasing of the vehicle, the client can decide on whether:

- 1) We pay the full amount of the replacement vehicle to the dealer and we can raise a debt with the client to pay back the client contribution (ACC will not contribute to any upgrades to the vehicle).
- 2) The client pays their contribution to the dealer and ACC pays the agreed contribution direct to the dealer or,
- 3) ACC pays the client the agreed contribution and they are responsible for paying the full amount to the dealer.

**NOTE What if the option is to proceed with a staged modification?**

Advise the client we will arrange any travel for them to meet with the vehicle modifier/provider. Advise them if an additional assessment is needed for hand controls, this will be completed during the meeting after the stage 1 modifications have been completed,

- g** In Salesforce, add a contact to record the conversation with the client.
- h** In Eos, following the discussion and agreement with the client and internal advice, generate and adapt to the client either the
- VM01 Vehicle Modifications standard approval letter or
  - VM02 Vehicle Modifications complex approval letter.


Send a copy of the letter to the client, the TFIA assessor and the modifier.

**NOTE What modifications do you need to make to the letter to the client?**

Remove any reference to Vehicle Rating Risks (VRR) as these are no longer used when purchasing vehicles. The template example below shows the letter with the VRR removed.

**NOTE What if the client is unable to pay their contribution for the replacement vehicle?**

Discuss this with the client and agree the amount to be created as a debt for the client. When completing the VM02 approval letter, outline the costs as agreed. Add a contact on the claim to record the conversations had with the client, detailing costs and contributions. Note how much the client is able to repay that is manageable for the client.

 Vehicle Mods example.doc



## 5.0 Request Purchase Order for standard modifications to an existing vehicle

Recovery Assistant, Recovery Coordinator, Recovery Partner

- a** In Eos, from the Recovery Plan sub-case, select 'Add Activity' and select 'NGCM Admin Request' task.

**NOTE How do you refer a task to Recovery Administration?**

Refer to Referring Tasks to Recovery Administration - Principles document for further information and guidance.

-  Referring Tasks to Recovery Administration - Principles
-  NG GUIDELINES Purchase Order Details - Vehicle Modifications

- b** Attach the completed and modified VM01 Vehicle Modifications standard approval letter.

## 5.1 Request Purchase order for replacement and standard modifications

Recovery Assistant, Recovery Coordinator, Recovery Partner

- a** Receive confirmation from the assessor that the replacement vehicle meets the injury needs of the client and is suitable for modifications.
- b** In Eos, from the Recovery Plan sub-case, select 'Add Activity' and 'NGCM Admin Request' task and enter details for the vehicle replacement.

**NOTE Can you include the modification details in the same task?**


You will need to create a new Admin Request to raise a purchase order for the modifications, as the party will be different to the dealer where the vehicle is being purchased.

**NOTE What documents should you have on file before proceeding to raising a request for a purchase order?**


You should have a pre-purchase inspection report of the replacement vehicle.

**NOTE How do you refer a task to Recovery Administration?**

Refer to Referring Tasks to Recovery Administration - Principles document for further information and guidance.

 Referring Tasks to Recovery Administration - Principles

- c** Add the dealer/broker as a participant on the claim (if we are paying them directly).

 NG GUIDELINES Purchase Order Details - Vehicle Modifications

- d** Attach the completed and modified VM01 Vehicle Modifications standard approval letter.

## 5.2 Request purchase order for purchase of highly specialised vehicle

Recovery Partner

- a** In Eos, from the Recovery Plan sub-case, select 'Add Activity' and select 'NGCM Admin Request' task and enter all the relevant information into the task.

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

- The name of the registered owner
- The registered owner must have one of the following:

- Valid NZ Driver Licence
- NZ birth certificate
- Valid NZ passport

This should be confirmed using the collecting and retaining I.D documentation process below. The I.D itself should not be sent with the task it is to confirm ownership rights.

- Registered owner postal address and phone number
- Preferred delivery dealer
- OT Details
- Use the Service Codes provided by Technical Services - do not use the quote.

 Collecting and Retaining I.D Documentation

- b** Attach the completed VM02 Vehicle modifications complex approval letter to the client.

## 5.3 Request purchase order for hand controlled or rental vehicle

Recovery Assistant, Recovery Coordinator, Recovery Partner

- a** In Eos, from the Recovery Plan sub-case, select 'Add Activity' and select 'NGCM - Entitlement task' and select New - NGCM - Set up Transport.

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

- Car is Wheelchair accessible
- Client is the Driver or Passenger
- Need is Short Term or Long Term
- Car requires Hand controls

**NOTE What if the support is for a rental vehicle while a client is waiting for a vehicle to be modified?**

Identify which supplier is to provide the rental AND the daily rate:

- Disability Rental Vehicles
- Freedom Mobility

Request Recovery Admin to arrange a booking.


## 6.0 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

## 7.0 Create and approve purchase order

### Recovery Administrator

- a** In Eos, generate a Purchase Order as specified in the task.

**NOTE What if the request is to arrange a hand controlled rental vehicle?**



The RTM should provide the details of the vendors (including the daily rate):

- Disability Rental Vehicles (VAK691)
- Freedom Mobility (VAF679)

Use the code VEH05 (car rental while awaiting vehicle mod: daily rate).


**NOTE What if the request is for a driving lesson only following a client's vehicle being modified?**

Use the code VEH04.

-  Creating purchase orders using general + QE
-  NG GUIDELINES Purchase Order Details - Vehicle Modifications

- b** Locate contracted vendors via the Geographic Location search, this must be done even if the vendor details are provided in the task.

If supplied with a non-contracted vendor use search for a party and add as a 'Vendor - Non-Contracted'.


 Search for a Party

- c** Approve the Purchase Order.

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

Save the Purchase Order. Create a request authorisation task and fill out the e-form. Refer to the 'Request Authorisation for a Purchase Order - System Steps' below for further detail.

If the Purchase Order is for the purchase of a vehicle, note in the "Request Authorisation" task that the Recovery Team Member will need to assign the task to Technical Services for approval as it will be above their Team Leader's delegation.

 Request Authorisation for a Purchase Order - System Steps


## 8.0 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 the client the appropriate approval letters as specified in the task.

 NG SUPPORTING INFORMATION Inbound and Outbound Document Checks

- c** Notify the vendor, via a CC of the above VM01 or VM02 client letters (where relevant) or via email using the relevant email template.

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

- d** Close the task.

**NOTE What if you are advised by a Provider they are unable to accept a referral?**

Go to Activity 7.0 (a) and complete a re-referral.

## 9.0 Receive completion report and next steps

### Recovery Assistant, Recovery Coordinator, Recovery Partner

- a** On completion of modifications the assessor will send you an ACC6268 TFI Assessor Completion report and any other related documents.

**NOTE What do you do if you need to raise a manual debt for the client?**

Once the client has received the vehicle, a manual debt can be created to allow the client to re-pay ACC for their agreed contribution.

1) In Eos, create and complete the ACC107 Request for Manual Debt Action

Insert the follow in the Reason for Request:

"ACC has approved a motor vehicle grant. Condition of approval is client would [enter what was agreed with the client]. Manual debt to be raised for \$xxxx, the trade-in value of their existing vehicle which is to be recovered from the client as per agreement".

The payment code for a vehicle grant is 4371.

2) Create a General Task with a description:

Motor Vehicle Contribution. Attach the ACC107 and the VM02 approval letter.

3) Send the task direct to Debt Management Unit

- b** Contact the client 4-6 weeks after completion of the modifications or the purchase of a specialised vehicle to check it's meeting the client needs and consider if there is any change in the level of independence and whether this will affect entitlements or additional supports being provided.

- c** Update the Final Outcome in the Recovery Plan.

**NOTE How do you update an outcome on the Recovery Plan?**

Refer to the NG GUIDELINES Agreed Interventions.

 NG GUIDELINES Agreed Interventions

- d** Consider whether the client can be transitioned to another Recovery Team.