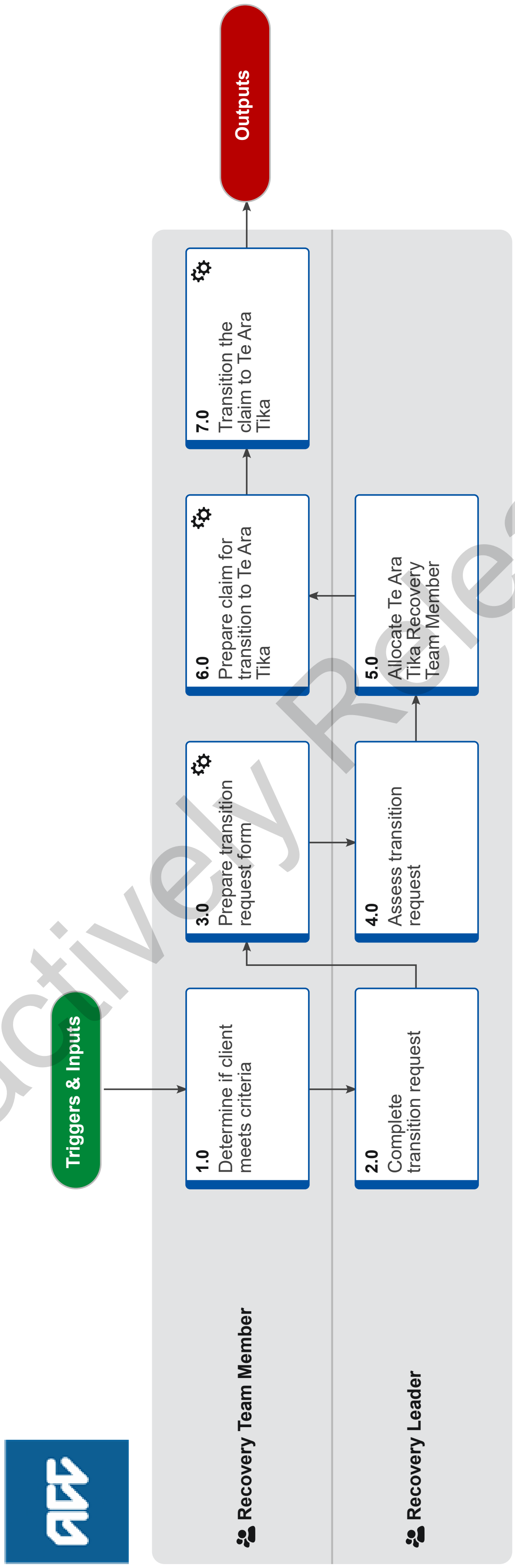
Transition Claim to Te Ara Tika [Historical] v19.7



Summary

Objective
To consider and transition a client to Te Ara Tika so that the client can be managed effectively and appropriately.

Background
The purpose of Te Ara Tika is to offer a flexible yet consistent client service delivery option to clients. This ensures complex clients will be managed in the one place allowing us to be flexible yet consistent in looking after the client's needs.

Any staff member can recommend transferring a claim to Te Ara Tika. Prompts for considerations include:
• The client has placed unreasonable demands on staff time, to the extent the support of the client has become challenging in the view of the Recovery Team Leader and/or Client Service Leader.
• The relationship between the client and ACC has become fraught, and the client openly shares negative opinions of ACC.
• The client may present with unreasonable behaviour, non-constructive communication, name calling, low impact non-directive threats
• The client submits frivolous requests, complaints or have phone calls/correspondence of a confrontational nature
• The client regularly contacts the media, senior managers, CEO, Minister and/or MPs

It is not a requirement for the client to have an active care indicator or a trespass order for them to be transferred to Te Ara Tika.

Owner [Name withheld]

Expert

Procedure

1.0 Determine if client meets criteria
Recovery Team Member

a Open the Partnered Decision Making Tool for transfer to Te Ara Tika to identify whether the client meets the criteria to be managed within the Te Ara Tika team.

Partnered Decision Making Tool for transfer to Te Ara Tika

b Take a screenshot of the recommendation from the Partnered Decision-Making tool.

NOTE **What if the tool has recommended not to transition the client?**
Continue to support the client in your Recovery Team.
Seek help around communication plans and ways of dealing with the client from one of the Te Ara Tika Team. This process ends.

c Send the screenshot to your Recovery Team Leader, and include the rationale for why the client should be considered for transition.

2.0 Complete transition request
Recovery Leader

a Review the information provided by the Recovery Team Member.

NOTE **What should you consider before completing the transition request?**
Before approving the transition check for the following:
• Consideration has been given to changing the client's Recovery Team Member
• Recovery Team Leader(s) are aware of the client's behaviour
• Consideration has been given to transition the client to another hub/Team
• Evidence of attempts to implement a communication plan and/or management plan with the client
• Evidence of attempts to manage the client's behavior with the support of specialised teams within ACC

NOTE **What if you disagree with the transition of the claim to Te Ara Tika?**
Consider alternative management options and discuss them with the Recovery Team Member or consider contacting the Te Ara Tika Team Leader for guidance.
This process ends.

b Contact the Te Ara Tika Team Leader to discuss the transition of the claim.

NOTE **What if the Te Ara Tika Team Leader advises the client does not meet the transition criteria?**
Request support from the Te Ara Tika Team Leader in developing a communication plan for the client.
Advise the Recovery Team Member of the decision.
You should also consider moving the client to another team member, suggest ways to manage the client through coaching and support to formalize boundaries with the client and using the support of other teams such as Practice Mentors, the Complaints and Resolution team, Cultural Capability teams and Psychology advisors.
This process ends

c Confirm the client meets the transition criteria to transition with the Te Ara Tika Team Leader.

d Advise the Recovery Team Member the claim will be transitioned and to complete the ACC6267 Te Ara Tika transfer form.

3.0 Prepare transition request form

Recovery Team Member

a Continue to manage the claim during the transition process, according to ACC Best Practice, this includes actioning an new tasks or requests, all contacts and documents and labelled correctly and the recovery plan is up to date in Salesforce.

4.0 Assess transition request

Recovery Leader

a Confirm that all practical management options have been exhausted:

NOTE **What if you don't have enough information?**
• Obtain more information from the Recovery Team Member.
• If you are unable to obtain further information from the Recovery Team Member, then discuss with other Leaders, other options and appropriate strategies.

NOTE **What if you disagree with the decision to transition the claim to Te Ara Tika?**
Consider alternative management options and discuss this with the Recovery Team Member and their team leader. This process ends.

5.0 Allocate Te Ara Tika Recovery Team Member

Recovery Leader

a Identify the most appropriate Te Ara Tika Recovery Partner to manage the claim when transitioned.

b Advise the new Te Ara Tika Recovery Partner of the new claim that will be allocated to them.

c Advise the current Recovery Team Leader of the new Recovery Partner and ask them to let the current Recovery Team Member know.

6.0 Prepare claim for transition to Te Ara Tika

Recovery Team Member

a Contact the new Te Ara Tika Recovery Partner to discuss the claim and expected timeframes for when the claim can be transitioned.

b Contact the client to inform them of the transition to Te Ara Tika.

NOTE **What if you're unable to contact the client?**
Continue to manage the claim until you're been able to contact the client.
The claim cannot be transitioned until it's been discussed with the client.

NOTE **What if the client has a communication plan in place?**
Discuss this with your Recovery Team Leader/and or future Te Ara Tika Recovery Partner to decide the best plan would be for the client going forward.

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

Identity Check Policy

d Advise the client of the transfer to a new Recovery Partner in the Te Ara Tika team, when they will be transitioned and the new contact details.

e In Salesforce, add a contact to record the main points of the conversation with the client.

f Set up a meeting with the new Te Ara Tika Recovery Partner and the client.

g Conduct the meeting, confirm with the client the timeframes for transition to allow for a smooth transition.

h In Salesforce, add a contact to record the main points of the conversation with the client.

i Inform your Team Leader the client is fully prepared to transition to the Te Ara Tika team.

7.0 Transition the claim to Te Ara Tika

Recovery Team Member

a In Eos, transfer the claim to the Te Ara Tika Branch queue.

b Contact the Te Ara Tika Team Leader and the Te Ara Tika Recovery Partner to inform them that the claim has been transferred to the queue.

Timeframes

None Noted