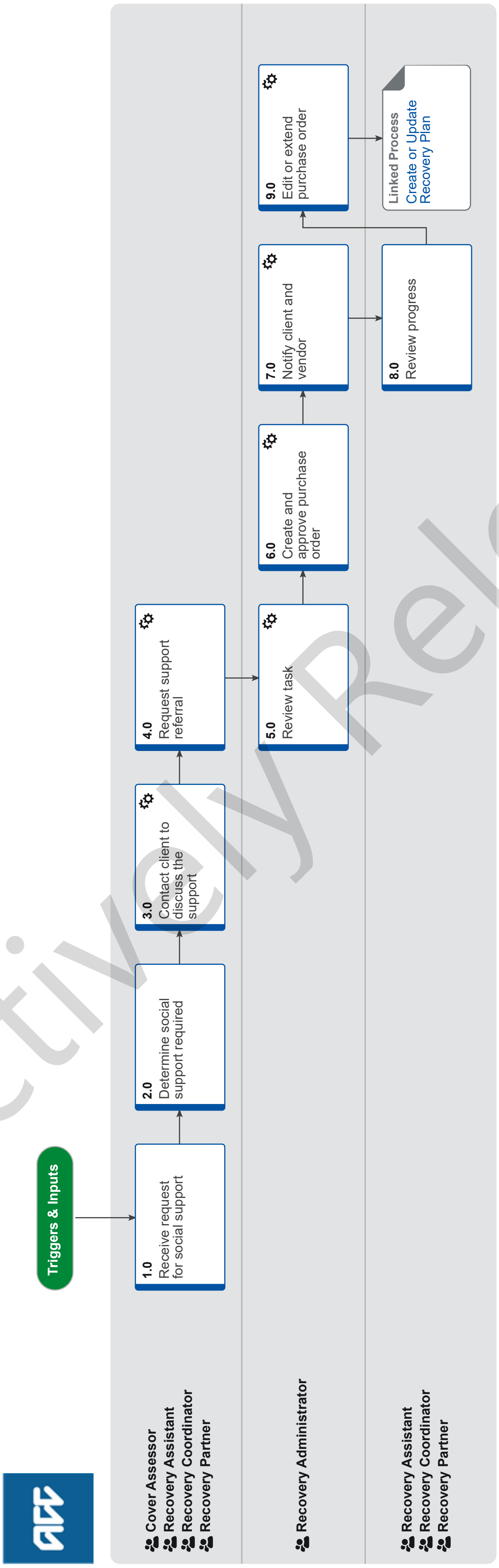
Set Up Palliative Care Support v9.0



Set Up Palliative Care Support v9.0

Summary

Objective
To action a request or need for Palliative Care. In some cases setting up supports takes place after an assessment has been completed.

Background
Inpatient and community palliative care is a specialist service providing care and management for palliative services. The service focuses on the physical, social, emotional and spiritual aspects of a client's wellbeing and supports the family/whānau.

Palliative care teams based at hospices are recognised experts in palliative care. Their assistance and advice should be sought in the first instance. More information about this service refer to the Palliative Care Service page.

Owner Name Withheld

Expert Name Withheld

Procedure

1.0 Receive request for social support

Cover Assessor, Recovery Assistant, Recovery Coordinator, Recovery Partner

a Review the request sent in by the Palliative Care Team. Check that all information has been provided in the ACC360 Palliative care plan - community visits or in the ACC359 Palliative care initial clinical team assessment. This may include retrospective request.

For more information about Palliative Care requests see the link below:

- Inpatient and Community Palliative Care Requests https://go.promapp.com/accnz/Process/6e3928bb-86

NOTE What if information is missing in the requests?
Generate and send the PAL07 Palliative care request more information - client, to the referrer.

- PAL07 Palliative care request more information - client
- NGCM - FINAL Emailing from Eos - System Steps

NOTE What if the request for support indicates that an additional assessment is required?
A request for additional specialised equipment or an external social rehabilitation assessment may be requested. Refer to the process below and consider if required.
PROCESS Arrange Social Rehabilitation Needs Assessment

- Guidelines - using a registered nurse for patients requiring palliative care..doc

b Review the service information provided in the service page, refer to the link below

- Inpatient and Community Palliative Care https://go.promapp.com/accnz/Process/6e3928bb-86

2.0 Determine social support required

Cover Assessor, Recovery Assistant, Recovery Coordinator, Recovery Partner

a Confirm the client's eligibility for the requested support.

NOTE What are the eligibility criteria?
• the client is clinically assessed as needing inpatient or community palliative care by a clinical hospice palliative multi-disciplinary team or General Practitioner
• the client has an accepted claim for cover.

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

NOTE What if the client is not eligible?
Decline the request. Refer to the Decision Making section in the Recovery Management guide below to help inform the decision.
• contact the client and referrer to advise them of the decision
• use the PAL05 and PAL06 letters.

NOTE What if the request is to extend or update the current purchase order?
Once eligibility is confirmed, generate an "NGCM Admin request" task requesting Recovery Administration to update the current purchase order. This process ends here.

- NG GUIDELINES Recovery Management
- PAL05 Palliative care decline - claimant
- PAL06 Palliative care decline - referrer
- Inpatient and community palliative care https://go.promapp.com/accnz/Process/6e3928bb-86
- Identify Claims for Rapidly Deteriorating Clients

b Obtain approval for the requested support.

NOTE How do you obtain approval?
Refer to the Seek Internal Guidance process Activity 3.1 Request Written Guidance to obtain approval from Clinical Services
PROCESS Seek Internal Guidance

- Delegations Framework

3.0 Contact client to discuss the support

Cover Assessor, Recovery Assistant, Recovery Coordinator, Recovery Partner

a Confirm who you need to contact. There may be a Authority to Act in place who is acting on the client's behalf. Check that the client has provided 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 Obtain Client Authority to Collect Information process.
PROCESS Obtain Client Authority to Collect Information

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

Identity Check Policy

c Explain that you are providing support for this service and check that the client/whanau understands the service.

Client Legislative Rights and Responsibilities Policy

NOTE What if the decision is to decline support?
Explain the reasoning for the decision with the client.

NOTE What if the client/whanau advises they don't require support at this point in time?
Let them know, if they want us to revisit this support at a later date, to contact us.

The process ends.

d In Salesforce record the conversation with the client as a contact, documenting the decision to approve/partially approve/decline the request.

NOTE What do you have to do to document your decision?
To document your decision, please refer to the '(NGCM) Document Recovery Decisions' process below.
PROCESS Issue Recovery Decision

e Ensure the appropriate decision letter is sent to the relevant parties after speaking with the client.
This will provide ACC with the ability to query this information for specific reporting purposes.

NOTE What if the request is declined?
• Ensure you complete documents (convert to pdf)
• Perform privacy checks using inbound and outbound document checks
• Send the decline letters to the client and referrer
• Ensure you have replied to the message quarantined email.

PAL05 Palliative care decline - claimant

PAL06 Palliative care decline - referrer

NG SUPPORTING INFORMATION Inbound and Outbound Document Checks

NGCM - FINAL Emailing from Eos - System Steps

f Add the agreed intervention to the Recovery Plan.

Recovery Plan - Create Agreed Intervention Actions - System Steps

NOTE How do you update the Recovery Plan?
Go to Create or Update Recovery Plan.
PROCESS Create or Update Recovery Plan

4.0 Request support referral

Cover Assessor, Recovery Assistant, Recovery Coordinator, Recovery Partner

a Generate a "NGCM Admin Request" Task to Administration for the support. Code: PAL05 community or PAL01 inpatient.

b Ensure you add the required information for the referral and complete all the mandatory fields.

NOTE What information do I need to include in the referral task?
• Whether the support is inpatient or community care.
• Include date range for inpatient care.
• Include number of visits for community care.
* Include geographic location.
• Vendor preference, if applicable.
• Reason for the referral.
• Care indicator.
• Provide the correct service code. Refer to the Purchase Order guidelines.

NOTE What if no vendor has been specified?
The ACC359 and ACC360 must specify a vendor. (note - details below in template: "Contracted Suppliers by Geographic Area" lacks palliative vendors, hence the need for the ACC360).

The client should receive the inpatient or community palliative care from a registered hospice. Check that the client's hospice is on the MFP list of registered hospices. If not, they advise the delegation holder and/or contact the DHB for help to find a palliative care provider.

NOTE Do you need to activate a vulnerable Care indicator?
Consider adding the vulnerable care indicator, this may be due to the clients cognitive impairment, ensure your obtain an authority to act. Refer to the process below.
PROCESS Obtain Authority to Act (ATA)

NOTE What if your client has a Care indicator?
You need to clearly outline this in the e-form.

Refer to the 'Disclosure of care indicator information to third parties' policy below for more information on how information is disclosed.

Disclosure of Care Indicator Information to Third Parties Policy

NG GUIDELINES Purchase Order Details - Palliative Services

Contracted Suppliers by Geographic Area of Coverage

Service Contracts and Contracted Providers - MFP spreadsheet

c Consider the timing of the task.

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, the Recovery team member will set a reminder task for themselves to a future date when the service is required to send a task to Recovery Administration.

NOTE **What are the SLAs?**
The referral tasks route to the Recovery Administration team with an SLA of 24 hours.

d Load the providor as a participant on the claim. This enables the Recovery Administration 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. For information on how to manage participants, refer to the link below.

Manage Participants (Eos Online Help)

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 the link below.

Principles of Working in the Administration Team

NOTE **What if the request is to extend a purchase order?**
Go to 9.0 Edit or extend purchase order.

6.0 Create and approve purchase order

Recovery Administrator

a In Eos, generate a purchase order for the specified referral

Creating purchase orders using general + QE

NG GUIDELINES Purchase Order Details - Palliative Services

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

b Identify and select the vendor.

NOTE **How do you select a vendor?**
Select the vendor from the Geographic Location search.

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

Manage Participants (Eos Online Help)

d Approve the purchase order.

NOTE **What if you do not have the delegation to approve the purchase order?**
Refer to the system steps below.

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 remember to change the Limited Payment List Indicator to 'Yes'.

7.0 Notify client and vendor

Recovery Administrator

a In Eos, check the client's preferred communication channel (SMS, email, etc).

NOTE **How do you send a notification to a client?**
Refer to the system steps below.

Create a Notification - System Steps

b Generate approval letters

NOTE **What letters do you send if the client is requiring inpatient care?**
• send the client the PAL01 Palliative care approve - claimant letter, and a copy to the referrer
• send the hospice the PAL02 Palliative care approve - vendor letter with the purchase order number.

PAL01 Palliative care approve - claimant letter

PAL02 Palliative care approve - vendor letter

NOTE **What does a quality referral look like?**
Refer to the Admin Template below.

Admin Template - Palliative Care

NOTE **What letters do you send if the client is requiring community palliative care?**
• send the client the PAL03 Community palliative care approve – claimant letter, and a copy to the referrer
• send the provider the PAL04 Community palliative care approve – vendor letter with the purchase order.

PAL03 Community palliative care approve – claimant letter

PAL04 Community palliative care approve – vendor letter

c Perform privacy checks using Inbound and outbound document checks.

NG SUPPORTING INFORMATION Inbound and Outbound Document Checks

d Create an email using the template or the Purchase order approval/extension template.
Select the most appropriate email address.

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

e Send letters to the client and vendor.

NOTE **What if the Vendor requires the documents to be sent via courier?**
Open the Packing guide document below.

Packing guide.docx

f Close the referral task.

8.0 Review progress

Recovery Assistant, Recovery Coordinator, Recovery Partner

a Receive update from the provider on the client and their need for support.

NOTE **What if the specialist palliative care team recommends or requests an extension to the support?**
Generate a NGCM Admin Request task requesting the purchase order is updated

NOTE **What if the extension request is declined?**
Send the following letters:
• PAL05 Palliative care decline - claimant
• PAL06 Palliative care decline - referrer

PAL05 Palliative care decline - claimant

PAL06 Palliative care decline - referrer

NGCM - FINAL Emailing from Eos - System Steps

NOTE **What if the client passes away?**
Go to the Stop Suppoprts process

PROCESS Stop Supports

9.0 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.

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