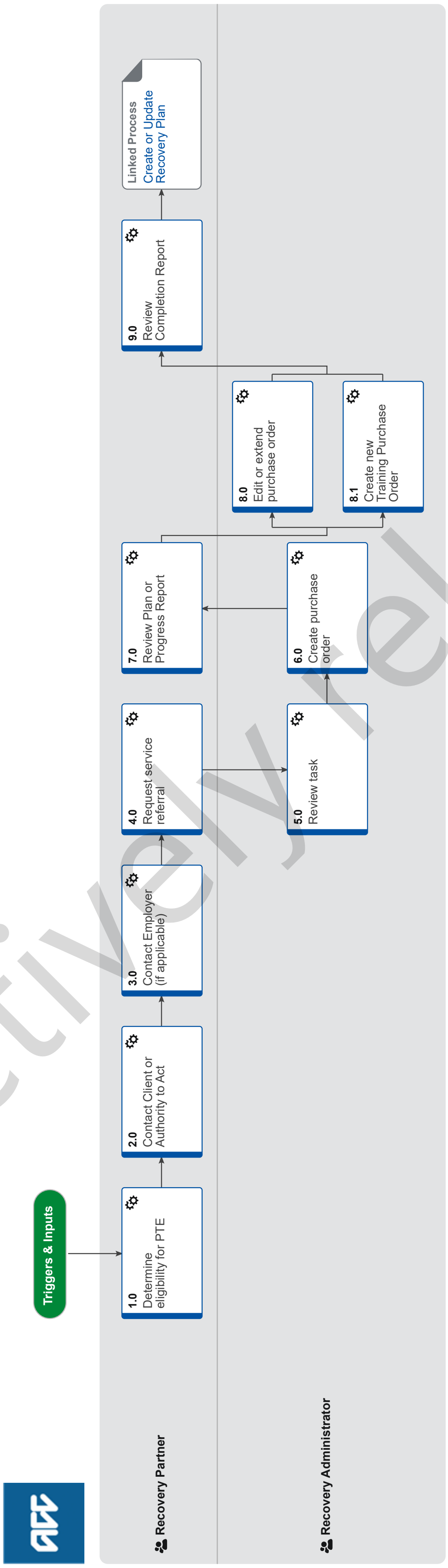
Set Up Pathways to Employment Support v18.0



Set Up Pathways to Employment Support v18.0

Summary

Objective
To assist a client to return to their pre-injury role and or return to the workforce.

Background
The Pathways to Employment [PTE] service has been designed for Partnered Recovery Clients who need return to work services. Services for our Partnered Recovery Clients usually need more time and input from VOC providers (including coordination across other providers) than our usual Stay ay Work and Back to Work services. The services provided will mirror those of SAW or BTW (dependent on the Client's rehabilitation goals) but there is an increased allowance in the pricing for greater provider inputs along the journey. Pathways to Employment (PTE) services are for Clients with complex needs who are expected to achieve one or more of the following outcomes:

1. Same job, same employer;
2. Modified job, same employer;
3. New job, same employer;
4. Similar job, new employer;
5. Modified job, new employer;
6. New job, new employer;
7. Work ready and vocationally independent;
8. Maximum employment participation.

This service will be referred to the Supplier by ACC.

Timeframes:
• Clients will remain in Pathways to Employment One for a minimum of 10 business days.
• Clients will remain in Pathways to Employment Two for up to a further 10 weeks.
• Clients will remain in Pathways to Employment Three for up to a further 6 weeks.
• Clients will remain in Pathways to Employment Exceptional for up to a further 6 weeks: ACC can approve a maximum of three Pathways to Employment Exceptional.

Owner [Name withheld]

Expert

Procedure

1.0 Determine eligibility for PTE
Recovery Partner

a In Salesforce, open Te Kete and review the client's claim history and current circumstances.

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

b Review the following to understand how PTE would benefit your client.

- Pathways to Employment (PTE) Services Service Page
- Vocational Rehabilitation Services Overview (VOC) Service Page
- Pathways to Employment FAQs
- Pathways to Employment Service scenario

NOTE **What if you're a Supported Recovery team member and consider my client should be referred for a PTE?**
If you consider your client has complex vocational support needs, then seek Practice Mentor guidance before making a PTE referral.
PROCESS Seek Internal Guidance

c Check the client meets one of the following criteria for Vocational Rehabilitation Services:

• they are entitled to weekly compensation or Loss Of Potential Earnings (LOPE)
• likely to be entitled to weekly compensation if we don’t provide vocational assistance
• no longer entitled to weekly compensation because they’ve reached the NZ Superannuation Qualifying Age (NZSQA)
• on parental leave.

NOTE **What if the client doesn't meet the eligibility criteria?**
Issue the appropriate Recovery Decision for the VOC request and consider other services which could benefit the client at this time. This process ends.
PROCESS Issue Recovery Decision

d Consider the following to determine if PTE is appropriate for your client:

• if a S103 outcome is the goal you are seeking for your client. An Initial Occupational Assessment (IOA) and Initial Medical Assessment (IMA) is not required prior to referring your client to this service.
• if a vocational independence outcome (VI) is the goal you are seeking for your client. An IOA and IMA is required prior to referring your client to this service.

e Check there is sufficient information on the claim to determine if PTE service is appropriate for the client.

NOTE **What if there is insufficient information to make this decision?**
Contact the relevant stakeholders to obtain further information. Then continue with this process.

NOTE **What if you have determined PTE service is not appropriate?**
Consider other services which could benefit the client at this time. This process ends.

f Based on the new information received determine if PTE is appropriate for the client.

NOTE **What if you have determined PTE service is not appropriate at this time?**
Consider other services which could benefit the client at this time. This process ends.

g Determine the correct level of support required.

NOTE **What if you consider your client will require a more complex VOC service?**
Send the referral for stage one and two.

NOTE **What if you're unsure your client will require a more complex VOC support?**
Send the referral for the initial set up only.

NOTE **What if your client has lost their pre-injury employment or is entitled to LOPE and should make a full recovery?**
Send the referral for stage one and the initial work specific functional rehab.

2.0 Contact Client or Authority to Act

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?**
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].
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 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/ATA 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 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
• the intended outcome of the service is for them to return to their pre-injury employment or a temporarily modified job with their current employer or work readiness
• advise the client the service consists of tailored, flexible interventions to meet their needs
• a workplace assessment is required as part of the service (if applicable)
• the assessment includes engagement with their employer (if applicable)

Client Legislative Rights and Responsibilities Policy

e Confirm the 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 (NGCM) Seek Internal Guidance.
PROCESS Seek Internal Guidance

f Advise the client:

• the Provider will contact them to schedule an appointment
• they are able to have a support person with them
• the Provider will send ACC a plan, progress and completion reports.

g Check if the client requires a copy of the plan, progress report and completion reports.

NOTE **What if the client wants to receive reports?**
Record this in the Vocational Life area in the 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 (Eos Online Help)

Contracted Suppliers by Geographic Area of Coverage

i In Salesforce, record the conversation as a contact on the claim.

3.0 Contact Employer (if applicable)

Recovery Partner

a Contact the client's employer to discuss the following:

• the client has agreed to participate in the PTE service
• the intended outcome of the service is for the client to return to their pre-injury employment or a temporarily modified job with their current employer
• advise the employer the service consists of tailored, flexible interventions to meet their needs
• a workplace assessment is required as part of the service.

NOTE **What if the client is no longer employed or has never been in paid employment?**
Go to e) and continue with the process.

b Advise the Employer the Provider will contact them to schedule an Assessment.

c Check if the client and employer have a preferred Provider.

NOTE **What if the client and employer have different preferred Providers?**
The client's preference takes precedence. Advise the employer you are unable to accommodate their preference.

d 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 Activity 4.0 Request service referral.
Review the contract timeframes and SLAs as specified in the service page.

Pathways to Employment (PTE) Services Service Page

e Add the Agreed Intervention to the Recovery Plan.

NOTE **What if you are unsure how to add an Agreed Intervention?**
Go to Create or Update Recovery Plan.
PROCESS Create or Update Recovery Plan

4.0 Request service referral

Recovery Partner

a In Eos, check the following documents are on the claim:

- recent medical information
- current medical certificate
- ACC45
- Recovery Plan
- previous/most recent Vocational Rehabilitation documents
- Curriculum Vitae (if applicable)

NOTE **What if there is information missing?**
Go to 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 documents 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 for the filed-away document under 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.

NOTE **What if the information 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.

If the claim is a complex mental injury (CMI) claim and you are unable to do the redactions yourself, send an email to Recovery Administration (recoveryadmin1@acc.co.nz) and include the document to be redacted plus your redaction instructions. If you have Adobe Pro and are able to do the redactions yourself, ensure you redact all appropriate information.

Privacy Check Before Disclosing Information Policy

NG SUPPORTING INFORMATION Inbound and Outbound Document Checks

Service Contracts and Contracted Providers - MFP spreadsheet

Disclosure of Care Indicator Information to Third Parties Policy

d In Eos, create a document group titled 'Pathways to Employment' and add the applicable documents to the group.

Manage document groups

e In Eos, generate a NGCM - Admin Request task for the Pathways to Employment referral.

NOTE **What information do you need to include in the task/e-form?**
Refer to the 'Manage Referral Task Templates document'.

Manage Referral Task Templates

f Consider the timing of the task. Tasks route to the Recovery Administration team with an SLA of 24 hours.

NOTE **What if the request is urgent and needs to be completed that day?**
Call Recovery Administration, provide the claim number and request the task is completed today.

Referring Tasks to Recovery Administration - Principles

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 Check if the task is NGCM - Admin Request task.

NOTE **What if this is a NGCM - Admin Request task is for editing or extending the purchase order?**
Go to Activity 8.0 Edit or extend purchase order.

c 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

NOTE **What if you receive a NGCM - Admin Request task for a re-referral as the Provider is unable to accept a referral?**
Continue to Activity 6.0 Create Purchase Order.

6.0 Create purchase order

Recovery Administrator

a In Eos, generate a Purchase Order using referral type Pathways to Employment.

NG GUIDELINES Purchase Order Details - Pathways to Employment

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

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

If there is no preferred vendor indicated in the task select one from the supplier list.

However, if the task does indicate a preferred vendor and the vendor is unable to provide the service consult with RP/ task creator regarding the referral being declined and if the Recovery Partner have another vendor in mind, then locate and update PO accordingly.

Creating purchase orders using general + QE

b Identify and select a PTE vendor using the Geographic Location search.

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

Contracted Suppliers by Geographic Area of Coverage

NOTE **What if a preferred vendor has been specified in the task?**
Select the vendor from the Contracted Supplier by Geographic Area Coverage list. Go to task (d) Approve Purchase Order.

c Add the selected Vendor as a participant on the claim.

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 documents' and generate the ACC98 referral for Pathways to Employment.

f Add additional information received in the task to the referral. For guidance refer to the Admin Template - Pathways to Employment Referral.

Admin Template - ACC98 Pathways to Employment Referral

g Perform privacy checks on the documents in the group.

NG SUPPORTING INFORMATION Inbound and Outbound Document Checks

Privacy Check Before Disclosing Information Policy

h Complete the documents and convert them into non-editable PDFs.

NOTE **What if there is a document group?**
Open document group and link the ACC98 to the group and email to the vendor.

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

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

NOTE **What if the email is too large to send as 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.

j In Salesforce, close the referral task.

7.0 Review Plan or Progress Report

Recovery Partner

a In Eos, open the ACC7982 PTE Initial and Progress Report.

ACC7982 PTE Initial and Progress Report

NOTE What if the Provider or client advised they failed to attend?
Go to Manage Non-Compliance.
PROCESS Manage Non-Compliance

b Perform privacy checks on the report.

NG SUPPORTING INFORMATION Inbound and Outbound Document Checks

Privacy Check Before Disclosing Information Policy

c Determine the suitability of the recommendations or request.

NOTE What if the Provider requests an Obtain Work Trial Set up or Monitoring?
No prior approval is required for billing the first Obtain Work Trial Set-up and Obtain Work Trial Monitoring.

If an additional obtain work trial approval is requested, review the request from the provider.

• Check if any barriers identified in the previous obtain work trial have been addressed as required. If not, these barriers should be addressed prior to approval of an additional obtain work trial.
• Check the Work Trial job is a work type stated in the Initial Medical Assessment as currently medically sustainable or likely to be medically sustainable and the client is in PTE stage 2 or above.
• Check medical certification has been received from the client's medical practitioner.

If the eligibility criteria are met, consider approving the additional obtain work trial.

To approve this, create a NGCM - Edit Manage Referral Purchase Order' task requesting the purchase order to be updated with the obtain work trial set up and monitor codes and to notify the provider.

NOTE What if you are unsure about recommendations made in the plan?
Contact the Provider to discuss and negotiate changes. Record this conversation as a contact on the claim. Once an amended report is received (if applicable) return to this process.

NOTE What if the Provider has contacted you to request the Pathways to Employment Service is put on hold?
Discuss the rationale for this request. Based on this discussion, if you decide to put the Service on hold, advise the provider of the decision and upload this correspondence to the claim and update salesforce accordingly.

Otherwise, advise the provider your decision to decline, record this conversation as a contact on the claim.

NOTE What if the Provider has contacted you to request the Pathways to Employment Service is restarted?
Upload this correspondence to claim and update salesforce accordingly.

NG GUIDELINES Purchase Order Details - Pathways to Employment

d Check if the plan has identified additional vocational training components.

NOTE What if the report identifies vocational training components to be paid directly to a third party provider?
Create a NGCM - Admin request task to create a new purchase order. Provide the service item code VT01 for vocational training excluding computer training or VT02 for computer training, vendor code, cost and date range and who should be advised of the approval. (Training vendor or PTE provider).

NOTE What if the report identifies vocational training components to be paid by the Pathways to Employment Service provider?
Create a NGCM - Admin request task to add the component to the existing purchase order. Provide service item code VT01 for vocational training excluding computer training and VT02 for computer training, vendor code, cost, purchase order number and date range.

e Check if the plan has identified the client requires progression to Stage 2, 3 or exceptional of the Pathways to Employment Service. Consider the Provider's rationale as to why Stage 2, 3 or exceptional is required.

NOTE What if you have determined Stage 2, 3 or exceptional is appropriate?
Create a NGCM - Admin Request task requesting the purchase order is updated as per progress report.

Ensure that you include the PO being extended, PO code and date range for the service.

NOTE What if you have determined Stage 2, 3 or exceptional is not appropriate?
Contact the Provider to discuss their rationale. Based on this discussion, if you decide Stage 2, 3 or exceptional is required create a NGCM - Admin Request task requesting the purchase order is updated as per the providers rationale and progress report. Otherwise advise the Provider your decision to decline. Record this conversation as a contact on the claim.

f Check if the client/ATA has requested copies of the reports in the Vocational Life area of the Recovery Plan.

NOTE What if the client has requested copies?
Send the reports by the clients preferred method of communication.

NOTE What if the client advises there is information in the report which is factually incorrect?
Contact the Provider and request the incorrect information is updated on the report and an amended report is provided. For further guidance refer to Managing a client's request to change personal information.

Managing a client's request to change personal information

NOTE **What if the client advises they disagree with the opinion provided the assessor in the report?**
The client can supply a 'statement of correction' to ACC which is then included with the report. This means any time the report is sent out, the statement of correction must be sent as well.

8.0 Edit or extend purchase order

Recovery Administrator

a Based on the type of request check the following has been provided in the task:

STAGE 2, 3 or Exceptional:
• Purchase Order Number
• Purchase Order Code
• Date range.

Obtain Work Trial:
- Purchase Order Number
- Purchase Order Code
- Date Range

NOTE **What if there is information missing?**
Go to the 'Task clarification' section in NG PRINCIPLES Working in the Administration Team for instructions.

Principles of Working in the Administration Team

b 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”.

c 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'.

NG GUIDELINES Purchase Order Details - Pathways to Employment

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

f In Salesforce, close the task.

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

8.1 Create new Training Purchase Order

Recovery Administrator

a Check the following has been provided in the task:

• Purchase Order code
• name of vendor
• date range
• cost
• confirmation of where to send the approval.

NOTE **What if there is information missing?**
Go to the 'Task clarification' section in NG PRINCIPLES Working in the Administration Team for instructions.

Principles of Working in the Administration Team

b In Eos, generate a Purchase Order using general + QE.

Creating purchase orders using general + QE

c Add the selected Vendor as a participant on the claim.

Manage Participants (Eos Online Help)

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

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

f In Salesforce, close the task.

9.0 Review Completion Report

Recovery Partner

a In Eos, open the ACC7981 PTE Completion Report.

ACC7981 PTE Completion Report

b Perform privacy checks on the report.

NG SUPPORTING INFORMATION Inbound and Outbound Document Checks

Privacy Check Before Disclosing Information Policy

c Check if the client has requested copy of the report in the Vocational Life area of the Recovery Plan.

d Check the completion report includes:

• reporting on the goals and outcomes achieved and the activities completed, or
• reasons why the client has not achieved the expected outcome and any recommendations for ongoing support.

NOTE **What if the report does not include this information?**
Contact the Provider to obtain this information. If necessary, request an updated completion report with this information added. Record this conversation as a contact on the claim. Once an updated report is received (if applicable) return to this process.

NOTE **What if the client has requested a copy?**
Send the reports by the clients preferred method of communication.

e Open the Agreed Intervention in the Recovery Plan and add the outcome.

NOTE **What if you are unsure how to add the outcome?**
Go to Create or Update Recovery Plan.
PROCESS Create or Update Recovery Plan

f Determine the next steps to progress the client's recovery.

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