

# Initial Medical Assessment

To determine a client's vocational rehabilitation (VR) needs, and to comply with the [AC Act 2001, Section 89](#), the client must attend an [Initial Occupation Assessment](#) (IOA) then an Initial Medical Assessment (IMA).

The following rules apply when requesting and completing an IMA.

## Rules

### Eligibility

To be considered for an IMA the client must:

- be covered by ACC for an injury
- be receiving weekly compensation
- have had an IOA
- be entitled to receive VR assistance
- be unlikely to maintain their pre-injury employment or any other employment with their pre-injury employer
- be referred by the case owner to the vendor of the IMA service.

### Our responsibilities

#### Referrals

When referring the client for an IMA you must:

- make sure the client is aware of the assessment procedure, including:
  - their right to bring a support person or persons to the assessment
  - their obligations to attend the assessment
- make sure the [selected vendor](#) meets the criteria under the [AC Act 2001, Section 93](#) or [AC Act 2001, Section 94](#) (exceptional circumstances)
- record the referral on the client's Individual Rehabilitation Plan (IRP)
- submit the referral to the assessor using both of these forms:
  - [ACC525 Initial Medical Assessment](#)(189K)
  - [ACC699 Initial Medical Assessment Referral](#) (153K)
- provide copies of all relevant information to the assessor, including:
  - the client's name and contact details
  - the claim number
  - the referring case owner's contact details
  - reasons for the IMA referral
  - a statement of expected rehabilitation outcomes
  - a current copy of the client's ACC consent form
  - a copy of the IOA report
  - copies of all other relevant reports or assessments
  - relevant information about the client's injury and/or physical restrictions

- information about any previous rehabilitation interventions or planned interventions
- a claims injury report (schedule of client injuries), detailing all ACC covered injuries
- advice about any known barriers to successfully completing the assessment
- a request to the vendor to complete an IMA report that determines whether the types of work identified in the IOA are, or are likely to be medically sustainable for the client.
- ensure that for every medical assessment referral you make (IMA, VIMA, MCR) a complete list of all the documents sent with the referral is loaded in Eos. This list will be available to the client and will be provided, with the referral to your assess. See [Export document list to an Excel spreadsheet](#)
- tell the assessor about any behaviour that could indicate risk, including any potential for the client to become aggressive or violent
- take all reasonable steps to safeguard the assessor, such as providing a security service if needed
- make sure that the assessor meets the required timeframes for providing the assessment.

## Completed IMA

You must evaluate the completed IMA report and invite the client and their General Practitioner (GP) to comment on any recommendations made.

## Client responsibilities

The client must:

- understand the purpose and content of the IMA and their obligation to attend the assessment
- tell the assessor about any barriers they think may stop them from working in any identified area
- give at least 24 hours' notice if they're unable to attend any arranged assessment
- give a reasonable explanation for failing to attend and negotiate suitable alternative dates
- discuss any issues relating to the VR we've provided.

## Medical assessor responsibilities

The medical assessor must:

- conduct the assessment by making a clinical examination of the client
- take the following information into account:
  - the IOA report
  - any medical reports we obtained before we prepared the client's IRP
  - any other relevant medical reports
  - any other injuries the client has suffered in the past
  - any condition(s) the client suffers that is not related to the personal injury
  - any other information the client provides that the assessor considers is relevant
- deliver assessments in a supportive manner that respects the dignity, rights, rehabilitation needs and cultural values of the client
- share information openly with the client and the case owner
- make sure the client is actively involved in their rehabilitation
- make sure the assessments are fair and reasonable
- deliver the service within agreed timeframes
- provide us with three copies of the IMA report.

## Medical assessor qualifications

The IMA assessor must be approved and meet the criteria in the AC Act 2001, Section 93.

To be approved an assessor must:

- be a registered medical practitioner
- hold vocational registration under the Medical Practitioners Act 1995
- have at least five years' experience in general practice
- have an interest and proven work experience in disability management in the workplace or in occupational rehabilitation
- meet at least one of the following conditions:
  - be a fellow of the Royal New Zealand College of General Practitioners, or hold an equivalent qualification
  - be training towards becoming a Fellow of the Royal New Zealand College of General Practitioners, or hold an equivalent qualification
  - have undertaken relevant advanced training

All assessors must be named on an IMA/VIMA contract held by an ACC vendor.

Assessors who don't meet the criteria in Section 93 may attend assessments as observers only. They must not sign the assessment and must be listed in the IOA report as having attended.

## Standard and complex IMAs

You must arrange a standard IMA for the client, unless any of the following complex assessment criteria apply:

- the client's case involves a serious injury
- the client has a covered sensitive claim
- two or more of the following:
  - the client's covered injury is a brain injury
  - the client's injury has been covered for five years or more
  - the client has received more than 15 previous medical and/or vocational reports
  - the client has more than 20 work-type detail sheets with two or more covered injury sites.

## Timeframes

The assessor must...	within...
accept or decline the referral	two working days of receiving a referral with all of the required information
contact the client to arrange the assessment appointment	four working days of receiving the referral
notify us if they're unable to contact the client	five working days of accepting the referral
notify us if the client fails to attend a scheduled assessment	one working day of the appointment
perform the assessment	10 working days of receiving the referral
complete the IMA report	10 working days of starting the assessment
forward 3 copies of the completed IMA report to us	eight working days of completing the report

## IMA report

The IMA report must include:

- information we provided to the assessor
- any medical reports we obtained before we prepared the client's IRP
- information about any non-injury related conditions that may impact on the client's ability to work
- any other relevant medical reports
- the IOA report, including the work type detail sheets
- the clinical findings from the assessor's examination, including any comment on pain and fatigue
- any other information the client provides that the assessor considers is relevant.

For more details see the IMA service schedule.