

DSS XXXX.X.XX

Creating a New Early Intervention Claim Record

Disability Case Portal (DCP)

Autism Advisor or Better Start Information and Registration Service

Version 3 – May 2019

This task card will take you through the process of creating a new Early Intervention Claim record in DCP.

## **What you should know**

* An Organisation can only submit claims for payment in respect of services provided to an eligible client to the value of up to $6,000 in a financial year and up to $12,000 in total.

**Before you create a claim for payment, you must:**

* Obtain the consent of the client’s parent/guardian or carer. You can find a copy of the AEI or BSI Service Delivery Record on the GPS Literature tab.
* Ensure that a client has funds available in their EI Balance.

A claim may only be submitted after an Intervention has been delivered.

**Creating and submitting a claim is a two-step process:**

1. An employee from your organisation **creates** the claim for payment.
2. A second employee then **submits** the completed claim to DSS for payment. To submit a claim for payment, please see *Submit a Claim Record to DSS for Payment* task card or training video.

**Portal Access**

Access the internet and log in to DCP at <https://portal.dss.gov.au/fofmsportal>

| Steps | Actions |
| --- | --- |
|  | To verify the client’s **Early Intervention Balance**, select the **Clients** screen tab. Portal home screen |
|  | Click the Query icon (Query) icon.  Clients screen |
|  | Enter the **Customer Reference Number (CRN) and Date of Birth** then click the Clients screen (Go) icon**.**  Clients screen |
|  | Click the **Last Name** hyperlink.  If you notice the child’s details need updating, please advise the family to contact their Autism Advisor or Better Start Registration and Information Service (RIS).  Clients screen |
|  | The **Client** record will display.  Clients screen |
|  | Navigate to the **EI Financials** view tab.EI Financials view tab |
|  | Check the Client has a sufficient **EI balance** for the current period or the ability to reimburse you for services you have provided.  EI balance |
|  | If the client has sufficient funds you are now able to create a **Claim.**  Navigate to the **Cases** view tab.  Cases screen |
|  | To access the **Case** record, select the **Case Id** hyperlink.  Cases screen |
|  | Navigate to the **Cases** **Claims** view tab.  Cases claims screen |
|  | Select the **Case Claims List** dropdown and change this to **Case Claims Details.**  Cases claims screen |
|  | Click the New icon (New) icon to create a new case claim.  Claim screen |
|  | This will create a blank record and allow you to create a claim for the relevant client.  Case claim screen |
|  | Use the dropdowns in the box and select the **Month** and **Year.** Click **Done.**  Case claim screen |
|  | Click the arrow next to the Service Category and from the list select **a Service Category**.  Case claim screen |
|  | Click the arrow next to the **Service Provided** and from the list select the service you are claiming for.  Case claim screen |
|  | Click the arrow next to the **Unit of Measure** and from the drop down list select the appropriate option. If you selected **Session** for the **Unit of Measure** you may enter the quantity.  Case claim screen |
|  | If you selected Hour for the Unit of Measure enter the **Total Hours.**  Case claim screen  MCj02344440000[1]**Important Note:** Please ensure you use the following format for entering hours – HH:MM (where HH is the total number of hours 1-24 and MM is the total for minutes 1-59). |
|  | Enter the **Total Amount Charged (GST Exclusive)** and **Amount Claimed (GST Exclusive)**.  MCj02344440000[1]Case claim screen  **Important Note:** It does not matter whether the charge includes GST as DSS will ………pay a GST exclusive amount to the organisation. |
|  | Click the arrow next to the **GST Code** dropdown and select **Out Of Scope** from the list.  Case claim screen |
|  | Tick the **Family Approved Claim** and **Payable Claim** box.  MCj02344440000[1]Case claim screen  **Important Note:** Ensure that the parent/guardian or carer has signed the Service Delivery Record for the exact amount to be claimed. |
|  | Click the Glyph located next to the **Location** field.   Case claim screen |
|  | A popup box will appear. From the options provided, select the Location in which the service was delivered from and click on **Pick**. For outreach services, select the main office of clinic address.  MCj02344440000[1]Pick locations box   **Important note:** If you would like to update your location information (add a new location, delete a current location) please email early.intervention@dss.gov.au to request these changes. |
|  | Click the arrow next to the **Claim Status** and select **Ready for Submission** from the list.  Case claim screen |
|  | MCj02344440000[1]Save the record by clicking the Menu icon (Menu) icon and selecting **Save Record**.  Claim screen save record option highlighted |
|  | The second employee or authorised person can now login and submit the claim for payment.  For instructions on how to submit a claim for payment follow the task card or training video Submit a Claim Record to DSS for Payment. |

**Need Help?**

For further assistance please contact the [GPS Helpdesk](mailto:GPS.Helpdesk@communitygrants.gov.au) on 1800 020 283 or email [GPS.Helpdesk@communitygrants.gov.au](mailto:GPS.Helpdesk@communitygrants.gov.au)