



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.

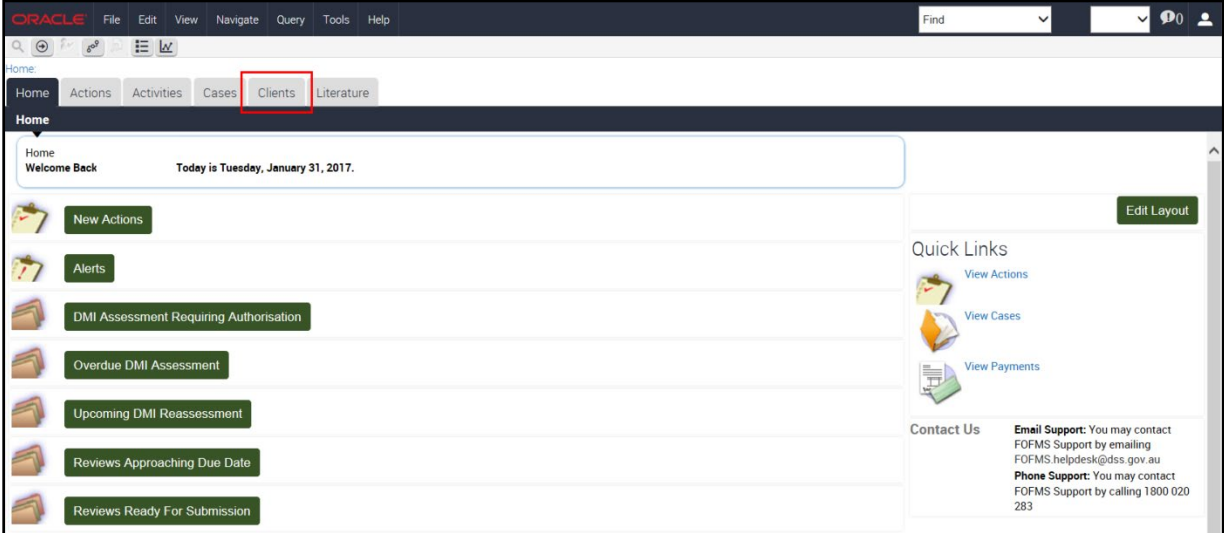

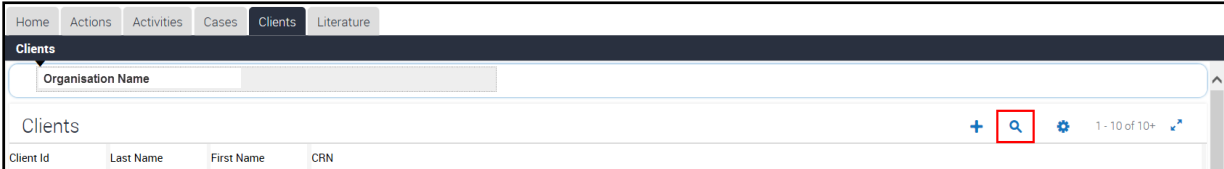

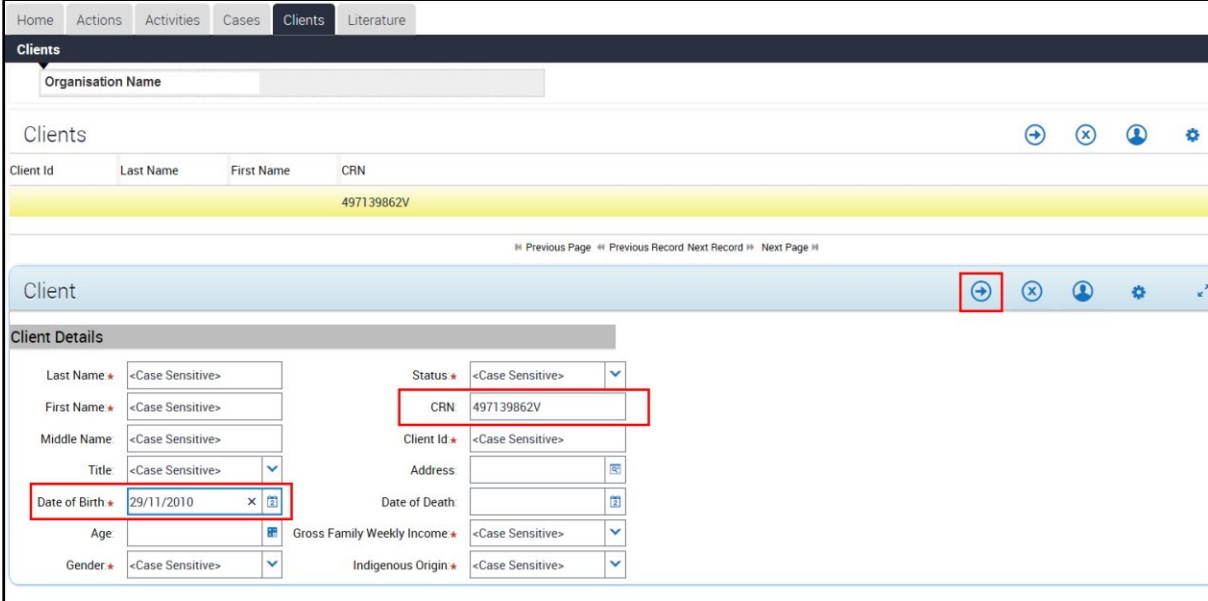
A claim may only be submitted after an Intervention has been delivered.

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
1	<p>To verify the client's Early Intervention Balance, select the Clients screen tab.</p> 
2	<p>Click the  (Query) icon.</p> 
3	<p>Enter the Customer Reference Number (CRN) and Date of Birth then click the  (Go) icon.</p> 

Steps	Actions
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- 4** 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).

Client Id	Last Name	First Name	CRN
4-3PQ0AAR	AUTOMATION1407	TEST36	497139862V

- 5** The **Client** record will display.

Client Details

Last Name*	AUTOMATION1407	Status*	Active
First Name*	TEST36	CRN:	497139862V
Middle Name:		Client Id*	4-3PQ0AAR
Title:	Mr	Address:	109 Johnston Crescent,
Date of Birth*	29/11/2010	Date of Death:	
Age:	6	Gross Family Weekly Income*	Medium (\$600 - \$1,999)
Gender*	M	Indigenous Origin*	Not Stated

Additional Details

Created/Updated by Centrelink:	<input type="checkbox"/>	Active EI Case Exists:	<input checked="" type="checkbox"/>
Active Disabilities Case Exists:	<input type="checkbox"/>	EI Details Verified:	<input checked="" type="checkbox"/>

Steps	Actions
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6 Navigate to the **EI Financials** view tab.

The screenshot shows the 'Client Details' page for a client named 'AUTOMATION1407'. The 'EI Financials' tab is highlighted with a red box. Below the client details, there is a section for 'Overall Limits and Balances' with the following values:

Overall Balance	\$12,000.00
Most Recent Period Balance	\$6,000.00

Additional text on the right side of the 'Overall Limits and Balances' section:

- * The Child is eligible for \$6,000 per financial year to a limit of \$12,000 in total OR until they reach their eligibility end date, which ever comes first.
- * Period Balance is the amount of money available to claim on Services or Resources in the period, taking into account the Period Balance as well as the Overall Available Balance. It displays whichever is the lesser.
- ** Period Resource Balance is the amount of money available to claim on Resources in the period, taking into account the Period Balance, the overall Available Balance, the Period Resource Balance and the Overall Resource Balance, whichever is the lesser.

7 Check the Client has a sufficient **EI balance** for the current period or the ability to reimburse you for services you have provided.

The screenshot shows the 'EI Financials' page. A red box highlights the 'Overall Limits and Balances' section, which includes the following values:

Overall Balance	\$12,000.00
Most Recent Period Balance	\$6,000.00
Eligibility End Date	29/11/2017
Overall Resource Balance	\$4,200.00
Most Recent Period Resource Balance	\$2,100.00
OR&R Paid	\$2000.00

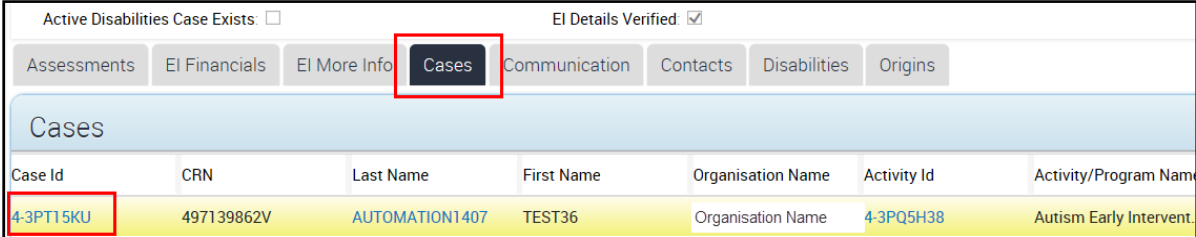
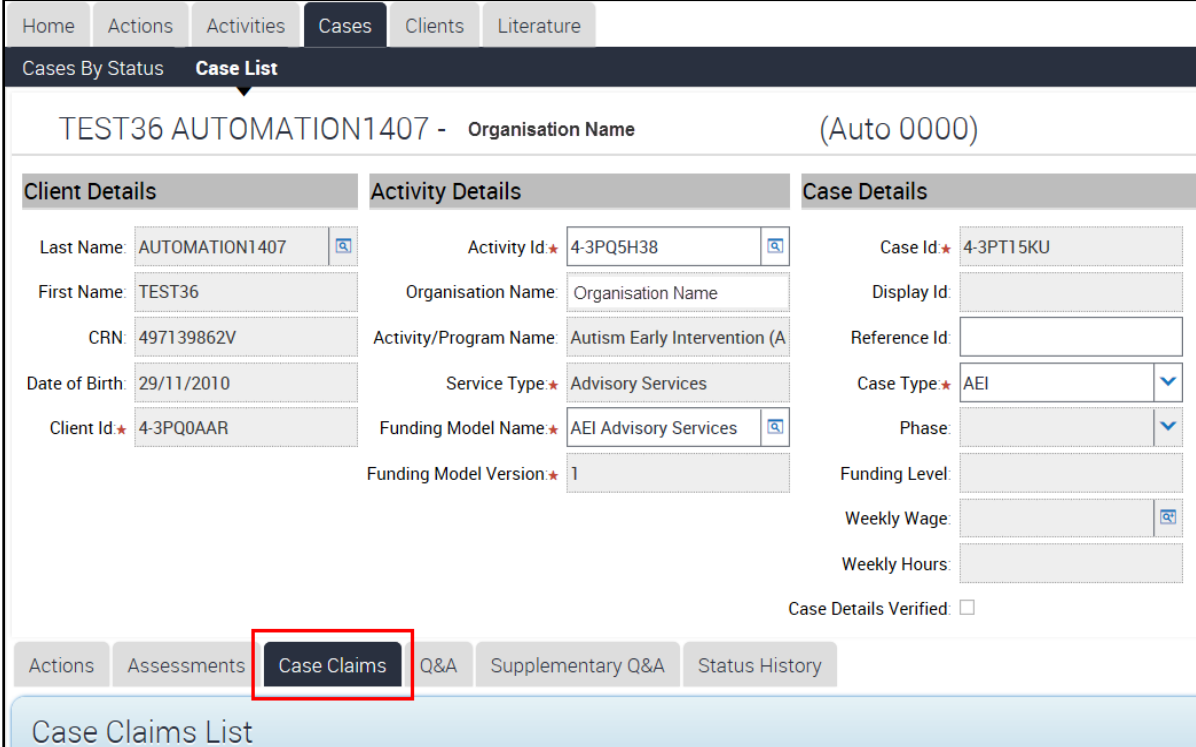
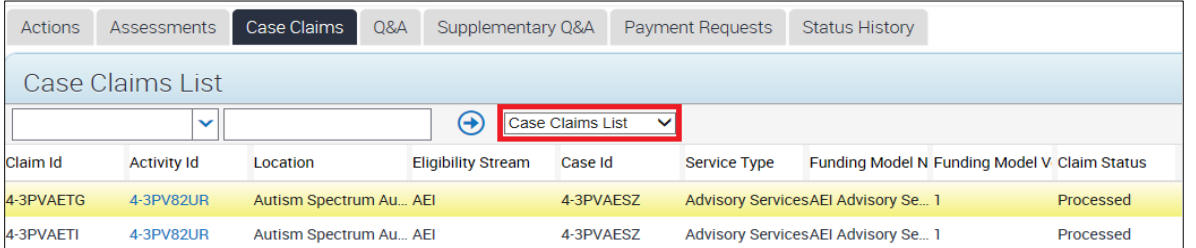
The same explanatory text from the previous screenshot is visible on the right side of the page.


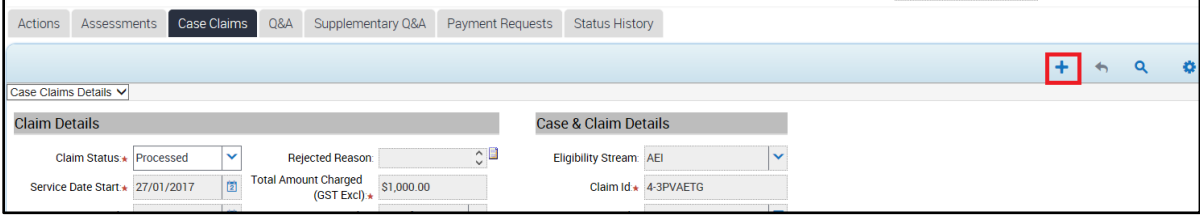
8 If the client has sufficient funds you are now able to create a **Claim**.

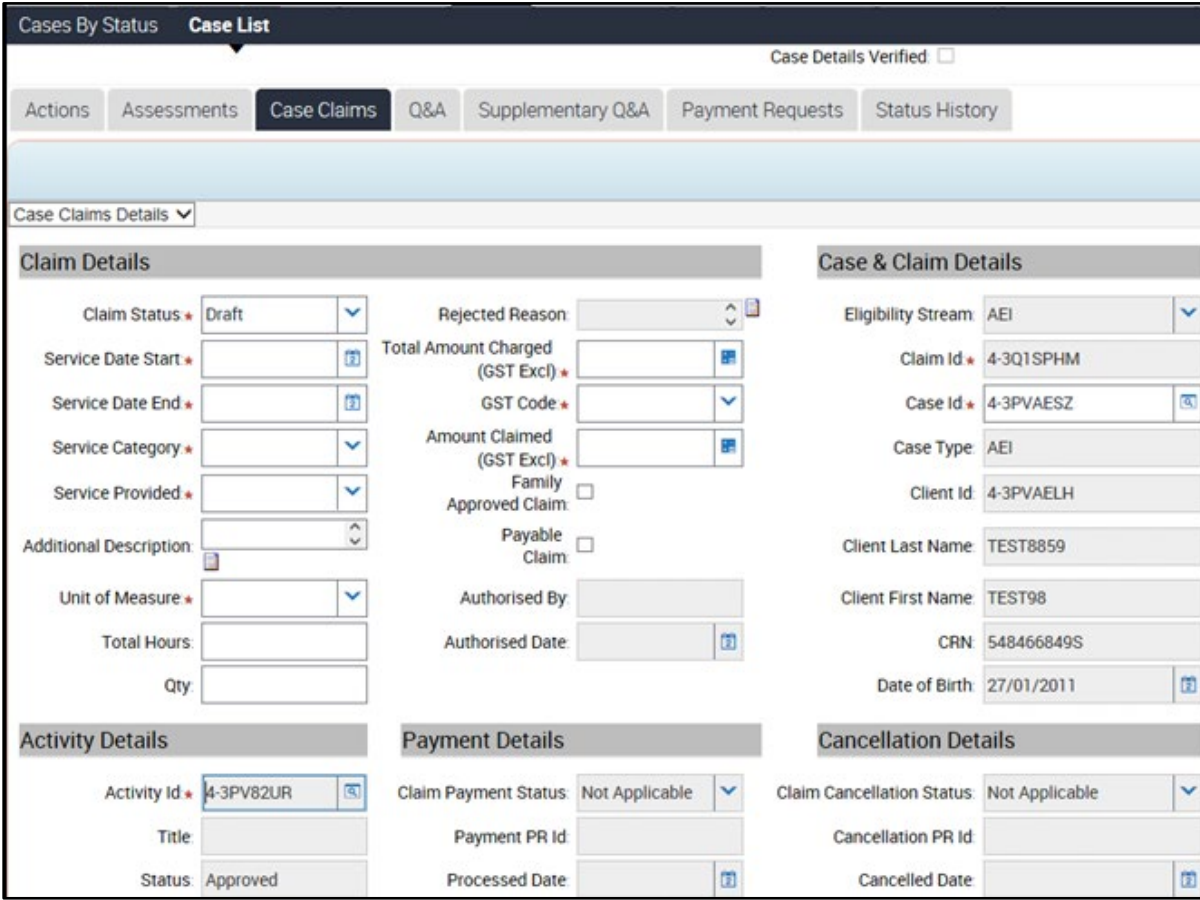
Navigate to the **Cases** view tab.

The screenshot shows the 'Cases' page. The 'Cases' tab is highlighted with a red box. At the top, there are checkboxes for 'Active Disabilities Case Exists' (unchecked) and 'EI Details Verified' (checked). Below the tabs, there is a table with the following data:

Case Id	CRN	Last Name	First Name	Organisation Name	Activity Id
4-3PT15KU	497139862V	AUTOMATION1407	TEST36	Organisation Name	4-3PQ5H38

Steps	Actions																											
9	<p>To access the Case record, select the Case Id hyperlink.</p>  <p>Active Disabilities Case Exists: <input type="checkbox"/> EI Details Verified: <input checked="" type="checkbox"/></p> <p>Assessments EI Financials EI More Info Cases Communication Contacts Disabilities Origins</p> <p>Cases</p> <table border="1"> <thead> <tr> <th>Case Id</th> <th>CRN</th> <th>Last Name</th> <th>First Name</th> <th>Organisation Name</th> <th>Activity Id</th> <th>Activity/Program Name</th> </tr> </thead> <tbody> <tr> <td>4-3PT15KU</td> <td>497139862V</td> <td>AUTOMATION1407</td> <td>TEST36</td> <td>Organisation Name</td> <td>4-3PQ5H38</td> <td>Autism Early Intervent.</td> </tr> </tbody> </table>	Case Id	CRN	Last Name	First Name	Organisation Name	Activity Id	Activity/Program Name	4-3PT15KU	497139862V	AUTOMATION1407	TEST36	Organisation Name	4-3PQ5H38	Autism Early Intervent.													
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10	<p>Navigate to the Cases Claims view tab.</p>  <p>Home Actions Activities Cases Clients Literature</p> <p>Cases By Status Case List</p> <p>TEST36 AUTOMATION1407 - Organisation Name (Auto 0000)</p> <table border="1"> <thead> <tr> <th>Client Details</th> <th>Activity Details</th> <th>Case Details</th> </tr> </thead> <tbody> <tr> <td>Last Name: AUTOMATION1407</td> <td>Activity Id: 4-3PQ5H38</td> <td>Case Id: 4-3PT15KU</td> </tr> <tr> <td>First Name: TEST36</td> <td>Organisation Name: Organisation Name</td> <td>Display Id:</td> </tr> <tr> <td>CRN: 497139862V</td> <td>Activity/Program Name: Autism Early Intervention (A</td> <td>Reference Id:</td> </tr> <tr> <td>Date of Birth: 29/11/2010</td> <td>Service Type: Advisory Services</td> <td>Case Type: AEI</td> </tr> <tr> <td>Client Id: 4-3PQ0AAR</td> <td>Funding Model Name: AEI Advisory Services</td> <td>Phase:</td> </tr> <tr> <td></td> <td>Funding Model Version: 1</td> <td>Funding Level:</td> </tr> <tr> <td></td> <td></td> <td>Weekly Wage:</td> </tr> <tr> <td></td> <td></td> <td>Weekly Hours:</td> </tr> </tbody> </table> <p>Case Details Verified: <input type="checkbox"/></p> <p>Actions Assessments Case Claims Q&A Supplementary Q&A Status History</p> <p>Case Claims List</p>	Client Details	Activity Details	Case Details	Last Name: AUTOMATION1407	Activity Id: 4-3PQ5H38	Case Id: 4-3PT15KU	First Name: TEST36	Organisation Name: Organisation Name	Display Id:	CRN: 497139862V	Activity/Program Name: Autism Early Intervention (A	Reference Id:	Date of Birth: 29/11/2010	Service Type: Advisory Services	Case Type: AEI	Client Id: 4-3PQ0AAR	Funding Model Name: AEI Advisory Services	Phase:		Funding Model Version: 1	Funding Level:			Weekly Wage:			Weekly Hours:
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11	<p>Select the Case Claims List dropdown and change this to Case Claims Details.</p>  <p>Actions Assessments Case Claims Q&A Supplementary Q&A Payment Requests Status History</p> <p>Case Claims List</p> <p>Case Claims List</p> <table border="1"> <thead> <tr> <th>Claim Id</th> <th>Activity Id</th> <th>Location</th> <th>Eligibility Stream</th> <th>Case Id</th> <th>Service Type</th> <th>Funding Model N</th> <th>Funding Model V</th> <th>Claim Status</th> </tr> </thead> <tbody> <tr> <td>4-3PVAETG</td> <td>4-3PV82UR</td> <td>Autism Spectrum Au...</td> <td>AEI</td> <td>4-3PVAESZ</td> <td>Advisory ServicesAEI Advisory Se...</td> <td>1</td> <td></td> <td>Processed</td> </tr> <tr> <td>4-3PVAETI</td> <td>4-3PV82UR</td> <td>Autism Spectrum Au...</td> <td>AEI</td> <td>4-3PVAESZ</td> <td>Advisory ServicesAEI Advisory Se...</td> <td>1</td> <td></td> <td>Processed</td> </tr> </tbody> </table>	Claim Id	Activity Id	Location	Eligibility Stream	Case Id	Service Type	Funding Model N	Funding Model V	Claim Status	4-3PVAETG	4-3PV82UR	Autism Spectrum Au...	AEI	4-3PVAESZ	Advisory ServicesAEI Advisory Se...	1		Processed	4-3PVAETI	4-3PV82UR	Autism Spectrum Au...	AEI	4-3PVAESZ	Advisory ServicesAEI Advisory Se...	1		Processed
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Steps	Actions
12	<p>Click the  (New) icon to create a new case claim.</p>  <p>The screenshot shows the 'Case Claims' tab selected in the top navigation bar. In the top right corner of the main content area, there is a red box around a plus sign icon, which is used to create a new case claim. Below this, the 'Claim Details' and 'Case & Claim Details' sections are visible, showing fields for Claim Status (Processed), Service Date Start (27/01/2017), Total Amount Charged (\$1,000.00), and Claim Id (4-3PVAETG).</p>

13	<p>This will create a blank record and allow you to create a claim for the relevant client.</p>  <p>The screenshot shows the 'Case List' view with the 'Case Claims' tab selected. A new claim record is displayed with the following details:</p> <ul style="list-style-type: none"> Claim Details: Claim Status: Draft; Service Date Start: [empty]; Service Date End: [empty]; Service Category: [empty]; Service Provided: [empty]; Additional Description: [empty]; Unit of Measure: [empty]; Total Hours: [empty]; Qty: [empty]. Case & Claim Details: Eligibility Stream: AEI; Claim Id: 4-3Q1SPHM; Case Id: 4-3PVAESZ; Case Type: AEI; Client Id: 4-3PVAELH; Client Last Name: TEST8859; Client First Name: TEST98; CRN: 548466849S; Date of Birth: 27/01/2011. Activity Details: Activity Id: 4-3PV82UR; Title: [empty]; Status: Approved. Payment Details: Claim Payment Status: Not Applicable; Payment PR Id: [empty]; Processed Date: [empty]. Cancellation Details: Claim Cancellation Status: Not Applicable; Cancellation PR Id: [empty]; Cancelled Date: [empty].
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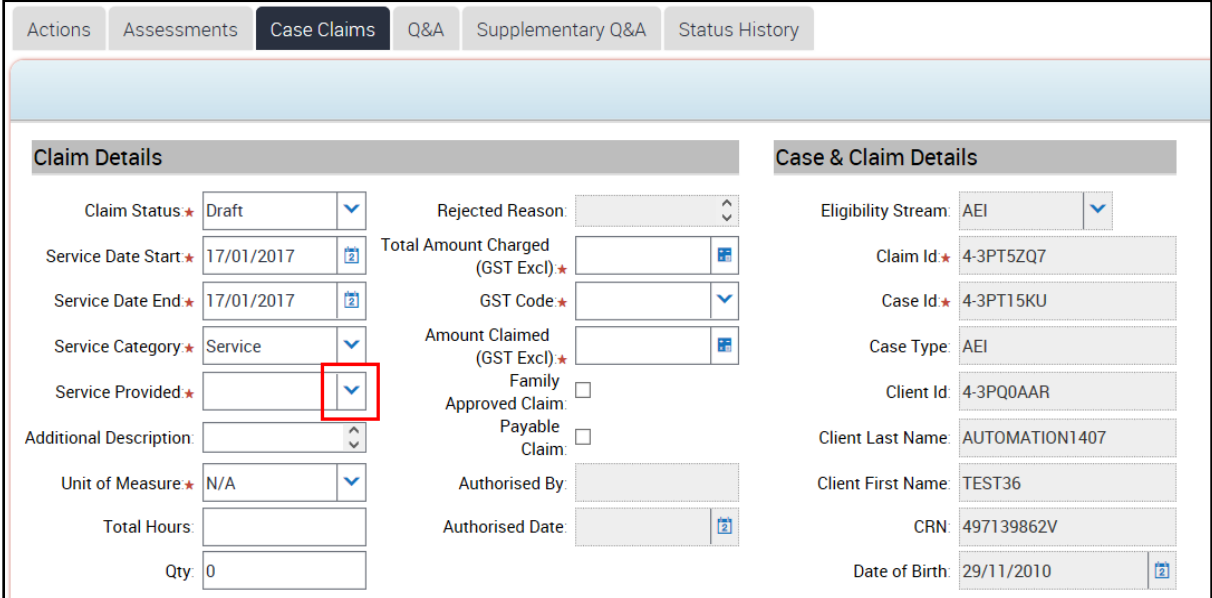
Steps	Actions
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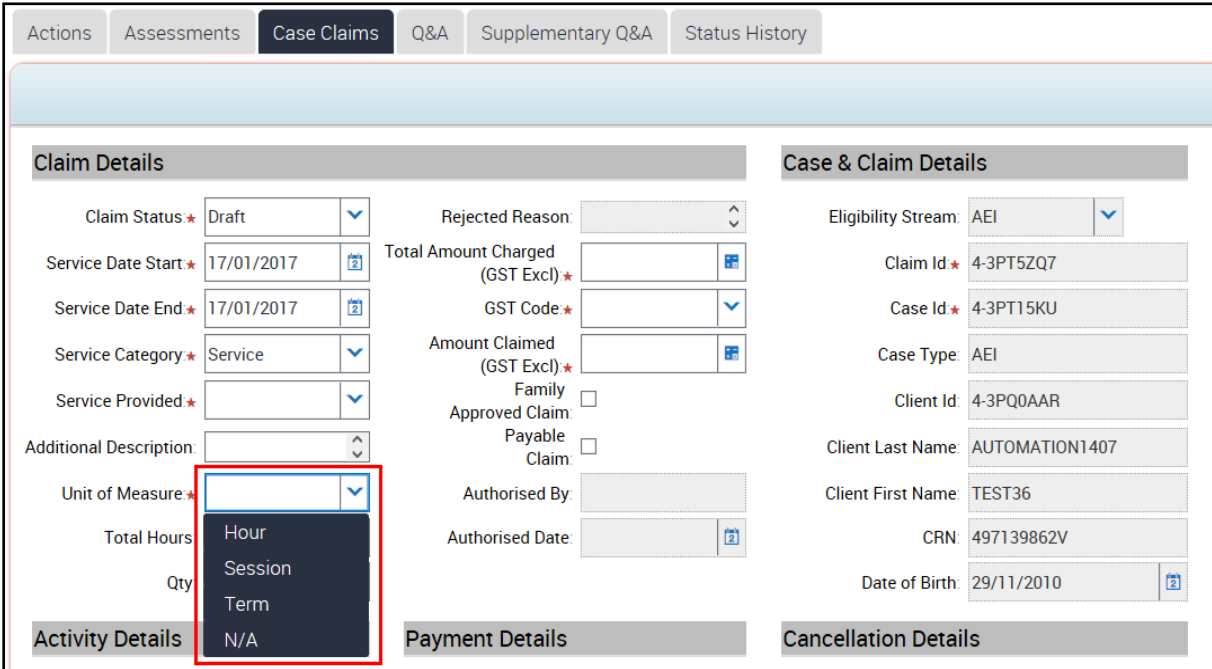
14 Use the dropdowns in the box and select the **Month** and **Year**. Click **Done**.

The screenshot shows a web interface with a navigation bar containing 'Actions', 'Assessments', 'Case Claims' (selected), 'Q&A', 'Supplementary Q&A', and 'Status History'. Below the navigation bar, there are two main sections: 'Claim Details' and 'Case & Claim Details'. In the 'Claim Details' section, a calendar for January 2017 is displayed. The calendar has a red border and a red box around the 'Done' button at the bottom right. The 'Service Date End' field is currently set to 31. Other fields in the 'Claim Details' section include 'Claim Status' (Draft), 'Service Date Start', 'Service Category', 'Service Provided', 'Additional Description', 'Unit of Measure', 'Total Hours', and 'Qty'. The 'Case & Claim Details' section includes 'Eligibility Stream' (AEI), 'Claim Id', 'Case Id', 'Case Type', 'Client Id', 'Client Last Name', 'Client First Name', 'CRN', and 'Date of Birth'.

15 Click the arrow next to the Service Category and from the list select a **Service Category**.

This screenshot shows the same web interface as the previous one, but with the 'Service Category' dropdown menu open. The dropdown menu is highlighted with a red box and contains the following options: 'BSWAT Financial', 'BSWAT Legal', 'OR&R', 'Relationship Assistance', 'Resource', and 'Service'. The 'Service Date Start' and 'Service Date End' fields are now populated with '17/01/2017'. The 'Service Category' field is currently empty. The rest of the form fields and layout are identical to the previous screenshot.

Steps	Actions
16	<p>Click the arrow next to the Service Provided and from the list select the service you are claiming for.</p>  <p>The screenshot shows the 'Case Claims' form with the following fields:</p> <ul style="list-style-type: none"> Claim Details: Claim Status (Draft), Service Date Start (17/01/2017), Service Date End (17/01/2017), Service Category (Service), Service Provided (dropdown highlighted with a red box), Additional Description, Unit of Measure (N/A), Total Hours, Qty (0). Case & Claim Details: Eligibility Stream (AEI), Claim Id (4-3PT5ZQ7), Case Id (4-3PT15KU), Case Type (AEI), Client Id (4-3PQ0AAR), Client Last Name (AUTOMATION1407), Client First Name (TEST36), CRN (497139862V), Date of Birth (29/11/2010).

17	<p>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.</p>  <p>The screenshot shows the 'Case Claims' form with the 'Unit of Measure' dropdown menu open, displaying the following options: Hour, Session, Term, N/A. The dropdown menu is highlighted with a red box.</p>
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Steps Actions

18 If you selected Hour for the Unit of Measure enter the **Total Hours**.

Actions Assessments **Case Claims** Q&A Supplementary Q&A Status History

Claim Details

Claim Status:
Service Date Start:
Service Date End:
Service Category:
Service Provided:
Additional Description:
Unit of Measure:
Total Hours:
Qty:

Rejected Reason:
Total Amount Charged (GST Excl):
GST Code:
Amount Claimed (GST Excl):
Family Approved Claim:
Payable Claim:
Authorised By:
Authorised Date:

Case & Claim Details

Eligibility Stream:
Claim Id:
Case Id:
Case Type:
Client Id:
Client Last Name:
Client First Name:
CRN:
Date of Birth:



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).

19 Enter the **Total Amount Charged (GST Exclusive)** and **Amount Claimed (GST Exclusive)**.

Actions Assessments **Case Claims** Q&A Supplementary Q&A Status History

Claim Details

Claim Status:
Service Date Start:
Service Date End:
Service Category:
Service Provided:
Additional Description:
Unit of Measure:
Total Hours:
Qty:

Rejected Reason:
Total Amount Charged (GST Excl):
GST Code:
Amount Claimed (GST Excl):
Family Approved Claim:
Payable Claim:
Authorised By:
Authorised Date:

Case & Claim Details

Eligibility Stream:
Claim Id:
Case Id:
Case Type:
Client Id:
Client Last Name:
Client First Name:
CRN:
Date of Birth:



Important Note: It does not matter whether the charge includes GST as DSS will pay a GST exclusive amount to the organisation.


Steps	Actions
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20 Click the arrow next to the **GST Code** dropdown and select **Out Of Scope** from the list.

Actions			Assessments			Case Claims			Q&A			Supplementary Q&A			Status History			
Claim Details												Case & Claim Details						
Claim Status *	Draft	▼	Rejected Reason:			Eligibility Stream:	AEI	▼	Claim Id *	4-3PT5ZQ7		Case Id *	4-3PT15KU		Case Type:	AEI		
Service Date Start *	17/01/2017	📅	Total Amount Charged (GST Excl) *	\$300.00		GST Code *	▼		Client Id:	4-3PQ0AAR		Client Last Name:	AUTOMATION1407		Client First Name:	TEST36		
Service Date End *	17/01/2017	📅	Amount Claimed (GST Excl) *	\$300.00		Family Approved Claim Payable Claim	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>		CRN:	497139862V		Date of Birth:	29/11/2010		📅			
Service Category *	Service	▼	Authorised By:			Authorised Date:												
Service Provided *	▼		Additional Description:			Unit of Measure *	Hour											
Total Hours:	002:30		Qty:															

21 Tick the **Family Approved Claim** and **Payable Claim** box.

Actions			Assessments			Case Claims			Q&A			Supplementary Q&A			Status History			
Claim Details												Case & Claim Details						
Claim Status *	Draft	▼	Rejected Reason:			Eligibility Stream:	AEI	▼	Claim Id *	4-3PT5ZQ7		Case Id *	4-3PT15KU		Case Type:	AEI		
Service Date Start *	17/01/2017	📅	Total Amount Charged (GST Excl) *	\$300.00		GST Code *	Out Of Scope		Client Id:	4-3PQ0AAR		Client Last Name:	AUTOMATION1407		Client First Name:	TEST36		
Service Date End *	17/01/2017	📅	Amount Claimed (GST Excl) *	\$300.00		Family Approved Claim Payable Claim	<input checked="" type="checkbox"/> <input checked="" type="checkbox"/>		CRN:	497139862V		Date of Birth:	29/11/2010		📅			
Service Category *	Service	▼	Authorised By:			Authorised Date:												
Service Provided *	▼		Additional Description:			Unit of Measure *	Hour											
Total Hours:	002:30		Qty:															

 **Important Note:** Ensure that the parent/guardian or carer has signed the **Service Delivery Record** for the exact amount to be claimed.

Steps


Actions

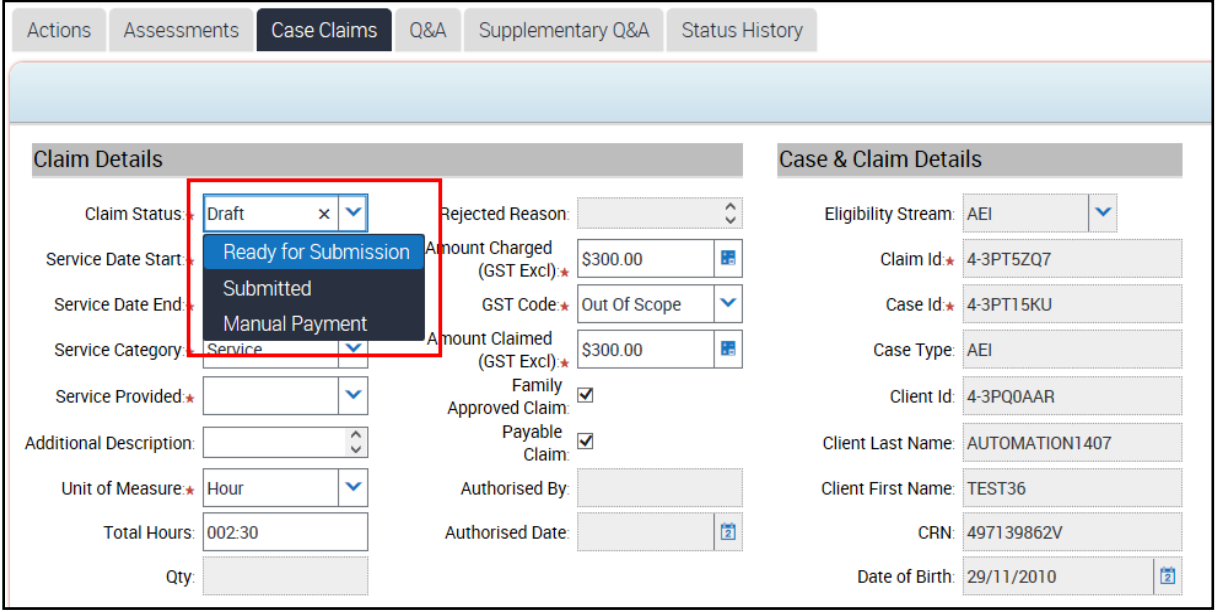

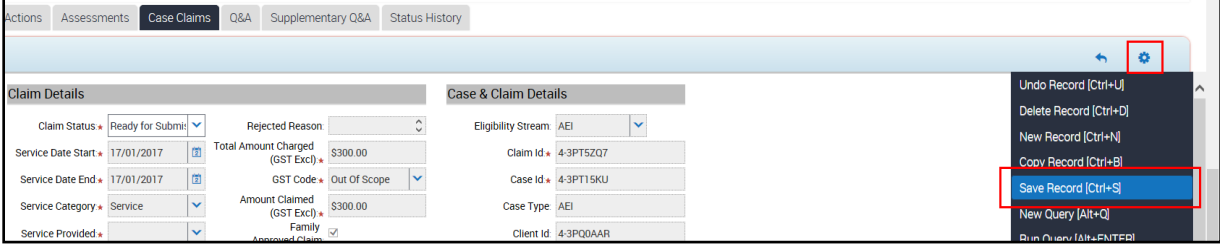
22 Click the Glyph located next to the **Location** field.

The screenshot shows the 'Case Claims' form with several sections: 'Claim Details', 'Case & Claim Details', 'Activity Details', 'Payment Details', and 'Cancellation Details'. The 'Location' field in the 'Activity Details' section is highlighted with a red box, and a small glyph icon (a square with a magnifying glass) is visible next to it.

23 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.

The screenshot shows the 'Case Claims' form with a 'Pick Locations' popup box overlaid. The popup has a search bar and a list of location options. The 'Pick' button is highlighted with a red 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.

Steps	Actions
<p>24</p>	<p>Click the arrow next to the Claim Status and select Ready for Submission from the list.</p> 
<p>25</p>	<p>Save the record by clicking the  (Menu) icon and selecting Save Record.</p> 
<p>26</p>	<p>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.</p>

Need Help?

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