



Creating a New Outer Regional and Remote (OR&R) Claim Record

Disability Case Portal (DCP)

This task card will take you through the process of creating a new Outer Regional and Remote (OR&R) Claim record in DCP.

What you should know

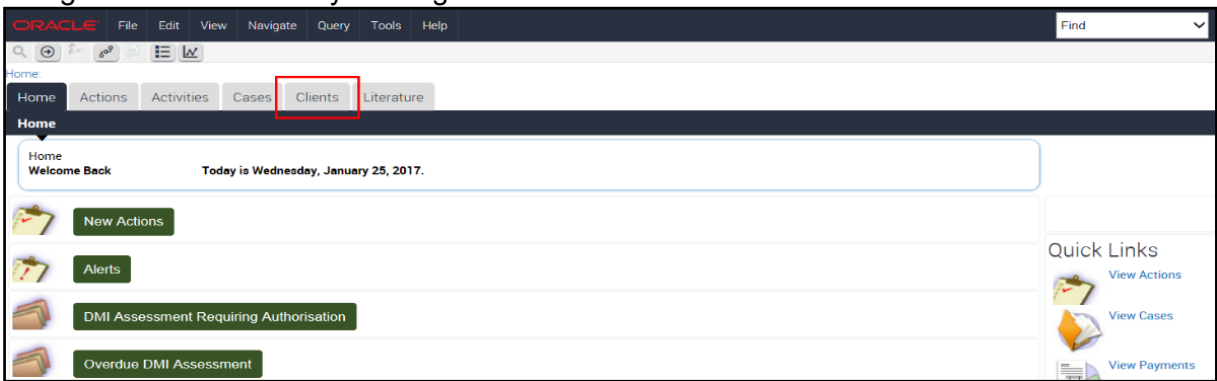
- If the client lives in an outer regional or remote location (as determined by DSS) they may be eligible to receive the OR&R payment.
- GPS automatically determines a client's eligibility for the OR&R payment according to the client's residential address entered on the Client record.
- You must obtain the consent of the client's family or carer before you create a claim record. You can find a copy of the AEI or BSI Client Consent Form on the GPS Literature Screen.
- You must provide the OR&R payment to the client's family or carer within 5 working days of receipt from DSS.
- Only one claim for the OR&R payment may be submitted for each client.


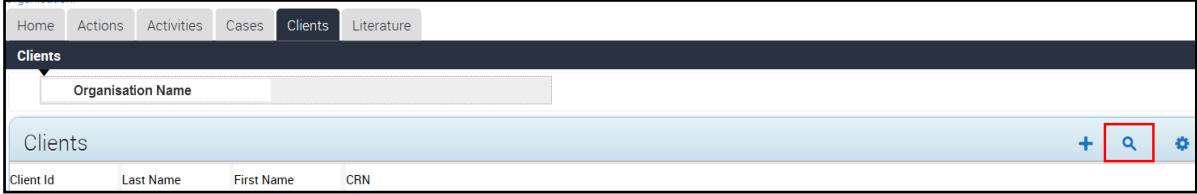

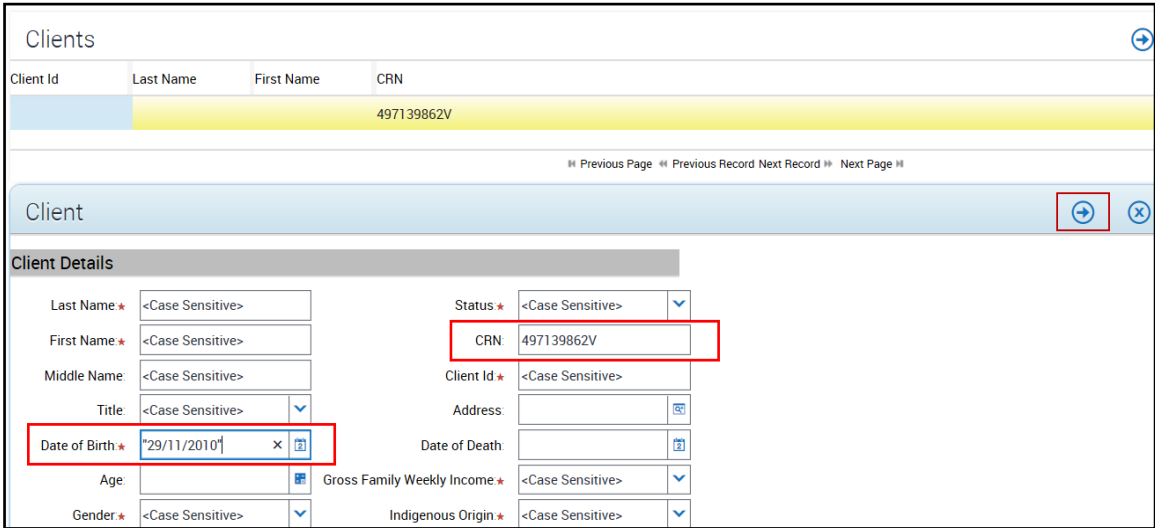
Creating and submitting a claim is a two-step process:

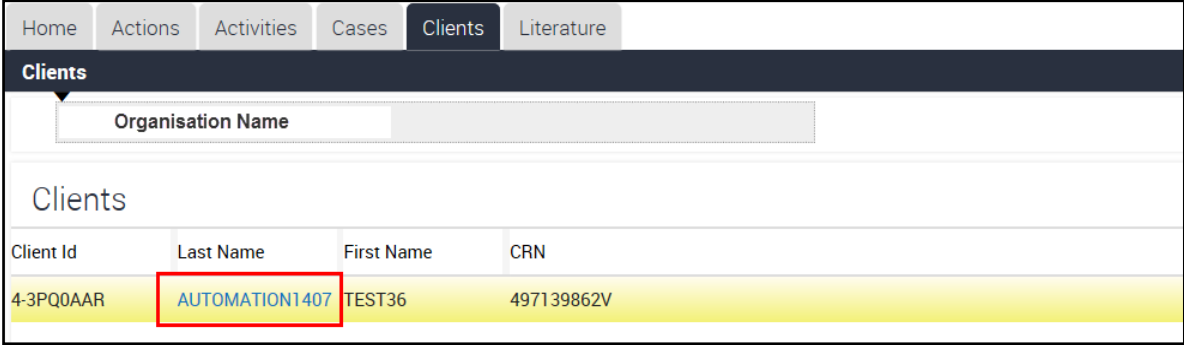
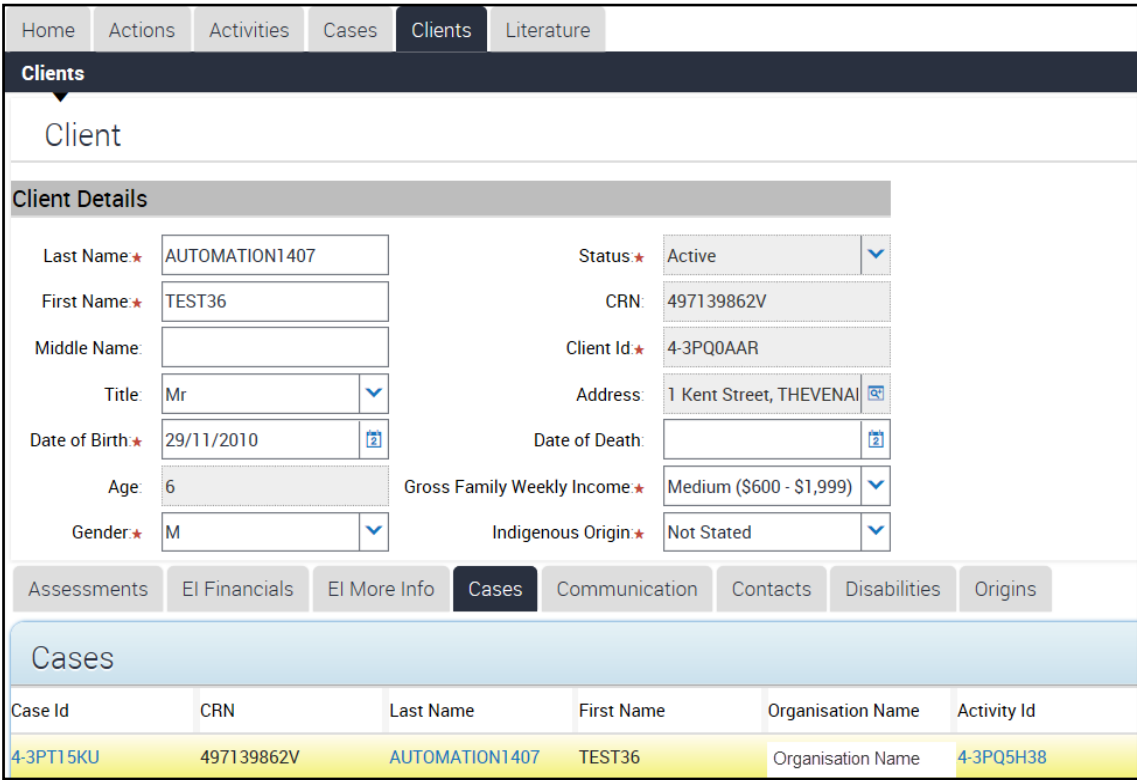
1. An employee from your organisation **creates** the claim for payment.
2. A second employee then **submits** the completed claim to DSS for payment. To submit a claim for payment, please see the *Submit a Claim Record to DSS for Payment* task card.

Portal Access:

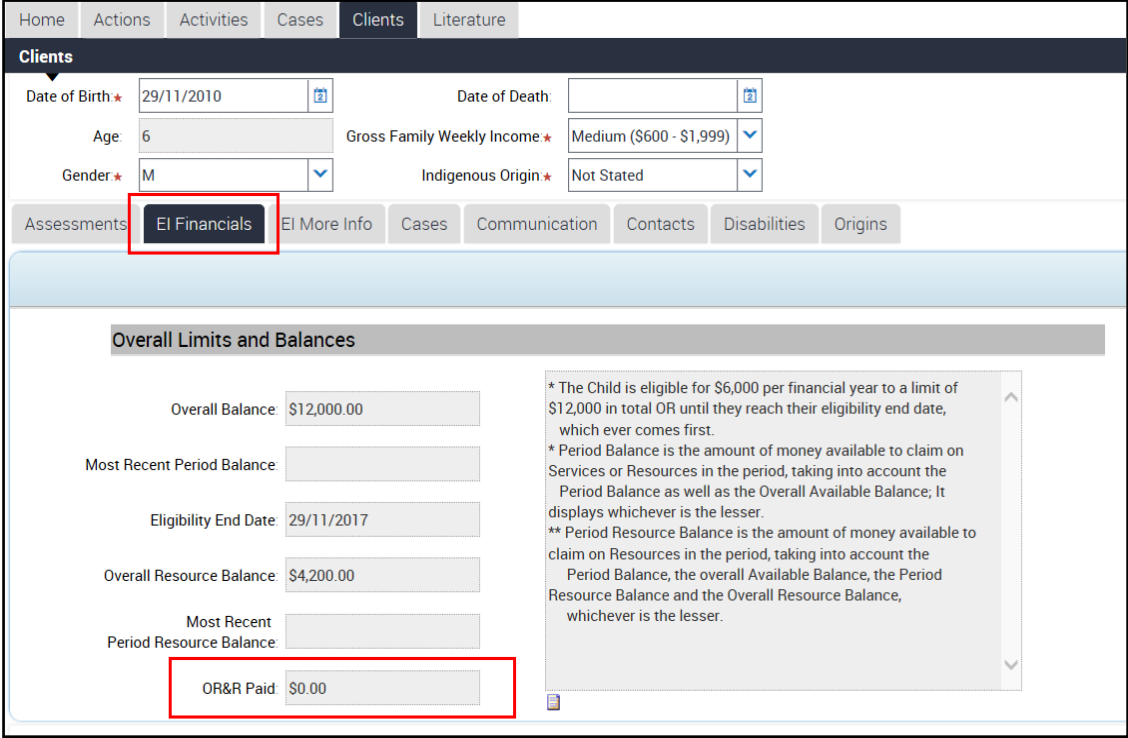

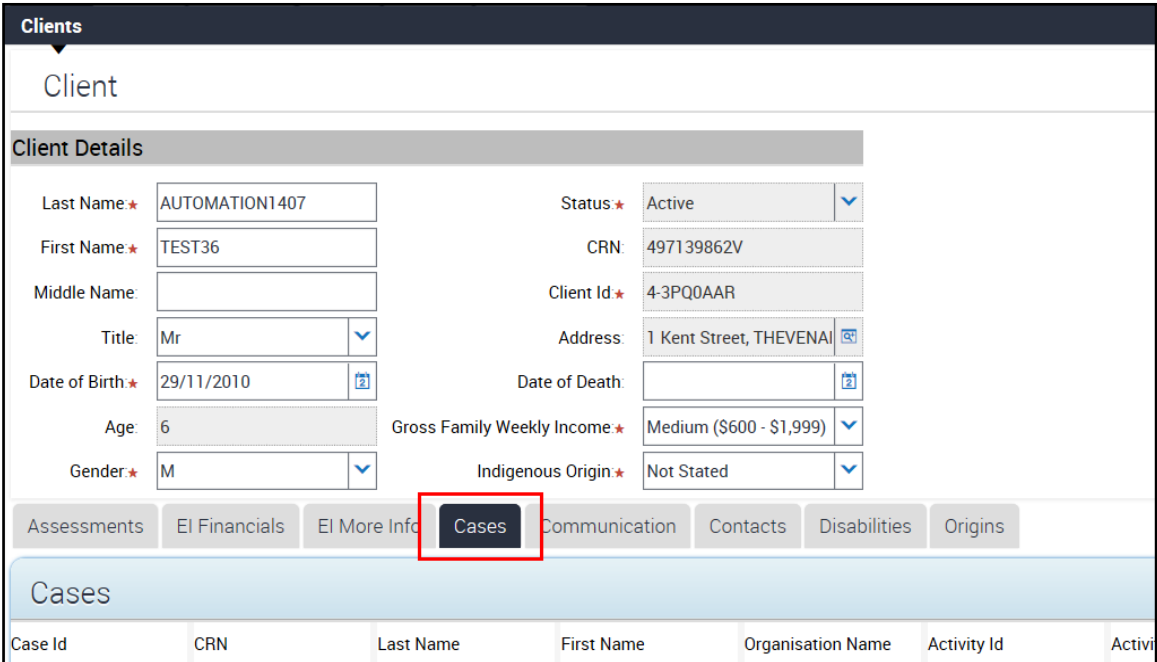
- Access the internet and log in to DCP at <https://portal.dss.gov.au/fofmsportal>

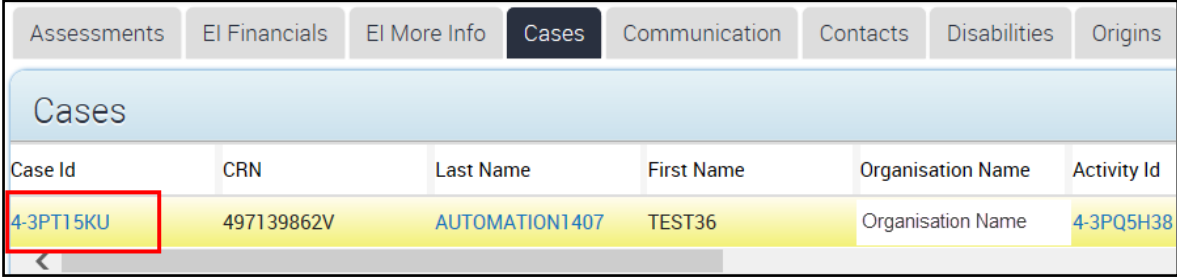
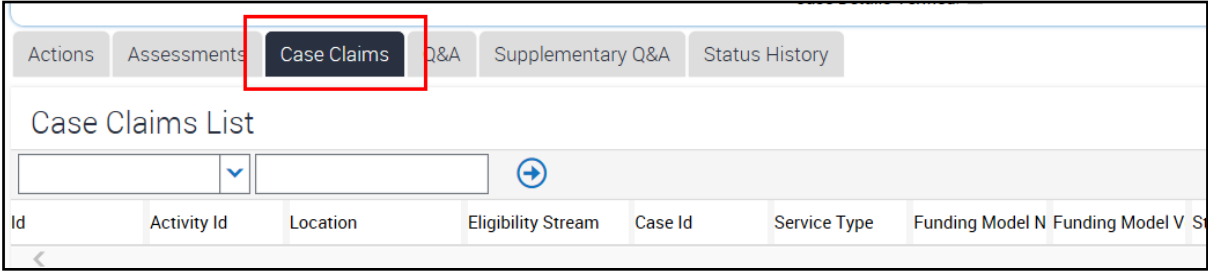

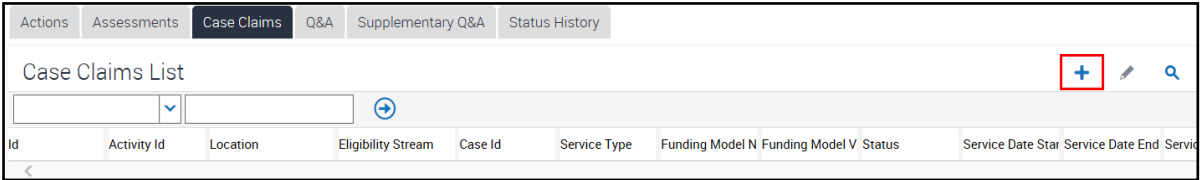
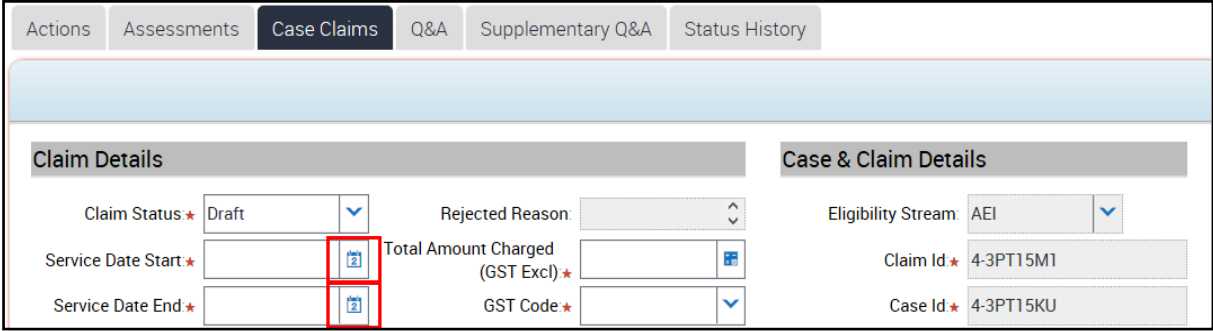
Steps	Actions
1	<p>Navigate to the Clients by clicking on the Clients tab.</p> 

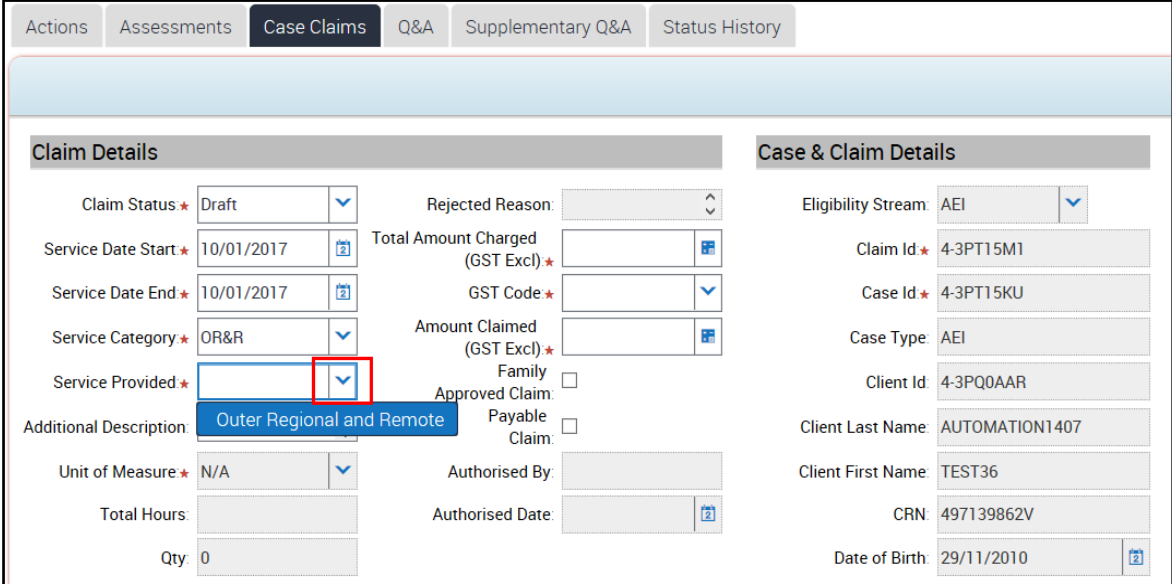
Steps	Actions
<p>2</p>	<p>Click the  icon to query for the Client.</p> 
<p>3</p>	<p>Enter the Centrelink Reference Number (CRN) and Date of Birth then click the  icon to execute the query.</p> 

Steps	Actions												
4	<p>Click the Last Name hyperlink.</p>  <p>The screenshot shows a navigation bar with 'Home', 'Actions', 'Activities', 'Cases', 'Clients', and 'Literature'. Below is a 'Clients' section with a search bar for 'Organisation Name'. A table lists clients with columns: Client Id, Last Name, First Name, and CRN. The first row is highlighted in yellow, and the 'Last Name' cell 'AUTOMATION1407' is enclosed in a red rectangular box.</p> <table border="1" data-bbox="248 629 1437 734"> <thead> <tr> <th>Client Id</th> <th>Last Name</th> <th>First Name</th> <th>CRN</th> </tr> </thead> <tbody> <tr> <td>4-3PQ0AAR</td> <td>AUTOMATION1407</td> <td>TEST36</td> <td>497139862V</td> </tr> </tbody> </table>	Client Id	Last Name	First Name	CRN	4-3PQ0AAR	AUTOMATION1407	TEST36	497139862V				
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4-3PQ0AAR	AUTOMATION1407	TEST36	497139862V										
5	<p>The Client record will display.</p>  <p>The screenshot shows the 'Client' record page with a navigation bar. The 'Client Details' section contains various fields: Last Name (AUTOMATION1407), First Name (TEST36), Middle Name, Title (Mr), Date of Birth (29/11/2010), Age (6), Gender (M), Status (Active), CRN (497139862V), Client Id (4-3PQ0AAR), Address (1 Kent Street, THEVENAI), Date of Death, Gross Family Weekly Income (Medium (\$600 - \$1,999)), and Indigenous Origin (Not Stated). Below this is a tabbed interface with 'Assessments', 'EI Financials', 'EI More Info', 'Cases', 'Communication', 'Contacts', 'Disabilities', and 'Origins'. The 'Cases' tab is selected, showing a table with columns: Case Id, CRN, Last Name, First Name, Organisation Name, and Activity Id. The first row is highlighted in yellow.</p> <table border="1" data-bbox="248 1512 1390 1601"> <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> </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> </tr> </tbody> </table>	Case Id	CRN	Last Name	First Name	Organisation Name	Activity Id	4-3PT15KU	497139862V	AUTOMATION1407	TEST36	Organisation Name	4-3PQ5H38
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Steps	Actions																												
<p>6</p>	<p>Navigate to the EI More Info view tab.</p> <div data-bbox="248 398 1430 952" style="border: 1px solid black; padding: 5px;"> <p>Client Details</p> <table border="0"> <tr> <td>Last Name *</td> <td><input type="text" value="AUTOMATION1407"/></td> <td>Status *</td> <td><input type="text" value="Active"/></td> </tr> <tr> <td>First Name *</td> <td><input type="text" value="TEST36"/></td> <td>CRN:</td> <td><input type="text" value="497139862V"/></td> </tr> <tr> <td>Middle Name:</td> <td><input type="text"/></td> <td>Client Id *</td> <td><input type="text" value="4-3PQ0AAR"/></td> </tr> <tr> <td>Title:</td> <td><input type="text" value="Mr"/></td> <td>Address:</td> <td><input type="text" value="1 Kent Street, THEVENAI"/></td> </tr> <tr> <td>Date of Birth *</td> <td><input type="text" value="29/11/2010"/></td> <td>Date of Death:</td> <td><input type="text"/></td> </tr> <tr> <td>Age:</td> <td><input type="text" value="6"/></td> <td>Gross Family Weekly Income *</td> <td><input type="text" value="Medium (\$600 - \$1,999)"/></td> </tr> <tr> <td>Gender *</td> <td><input type="text" value="M"/></td> <td>Indigenous Origin *</td> <td><input type="text" value="Not Stated"/></td> </tr> </table> <p>Assessments EI Financials EI More Info Cases Communication Contacts Disabilities Origins</p> <hr/> <p>Eligibility and Diagnosis Details Confirmation of Eligibility</p> </div>	Last Name *	<input type="text" value="AUTOMATION1407"/>	Status *	<input type="text" value="Active"/>	First Name *	<input type="text" value="TEST36"/>	CRN:	<input type="text" value="497139862V"/>	Middle Name:	<input type="text"/>	Client Id *	<input type="text" value="4-3PQ0AAR"/>	Title:	<input type="text" value="Mr"/>	Address:	<input type="text" value="1 Kent Street, THEVENAI"/>	Date of Birth *	<input type="text" value="29/11/2010"/>	Date of Death:	<input type="text"/>	Age:	<input type="text" value="6"/>	Gross Family Weekly Income *	<input type="text" value="Medium (\$600 - \$1,999)"/>	Gender *	<input type="text" value="M"/>	Indigenous Origin *	<input type="text" value="Not Stated"/>
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<p>7</p>	<p>If the Eligible for OR&R Payment is ticked, the client is eligible for the payment.</p> <div data-bbox="248 1115 1430 1585" style="border: 1px solid black; padding: 5px;"> <p>Assessments EI Financials EI More Info Cases Communication Contacts Disabilities Origins</p> <hr/> <table border="0"> <tr> <td colspan="2">Eligibility and Diagnosis Details</td> <td colspan="2">Confirmation of Eligibility</td> </tr> <tr> <td>Eligibility Stream:</td> <td><input type="text" value="AEI"/></td> <td>Eligible for EI Funding:</td> <td><input checked="" type="checkbox"/></td> </tr> <tr> <td>Basis of Eligibility:</td> <td><input type="text" value="State/Territory service"/></td> <td>Eligibility Start Date:</td> <td><input type="text" value="29/11/2016"/></td> </tr> <tr> <td>Details if Other:</td> <td><input type="text"/></td> <td>Eligible for OR&R Payment:</td> <td><input checked="" type="checkbox"/></td> </tr> <tr> <td>Month/Year of Diagnosis:</td> <td><input type="text" value="11/2016"/></td> <td>Eligibility End Date:</td> <td><input type="text" value="29/11/2017"/></td> </tr> <tr> <td>Diagnosis Tool:</td> <td><input type="text" value="ADEC"/></td> <td>Override Eligibility End Date:</td> <td><input type="checkbox"/></td> </tr> <tr> <td>Details if Other:</td> <td><input type="text"/></td> <td></td> <td></td> </tr> </table> </div>	Eligibility and Diagnosis Details		Confirmation of Eligibility		Eligibility Stream:	<input type="text" value="AEI"/>	Eligible for EI Funding:	<input checked="" type="checkbox"/>	Basis of Eligibility:	<input type="text" value="State/Territory service"/>	Eligibility Start Date:	<input type="text" value="29/11/2016"/>	Details if Other:	<input type="text"/>	Eligible for OR&R Payment:	<input checked="" type="checkbox"/>	Month/Year of Diagnosis:	<input type="text" value="11/2016"/>	Eligibility End Date:	<input type="text" value="29/11/2017"/>	Diagnosis Tool:	<input type="text" value="ADEC"/>	Override Eligibility End Date:	<input type="checkbox"/>	Details if Other:	<input type="text"/>		
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Steps	Actions
8	<p>Navigate to the EI Financials tab to check the OR&R paid field to check if the payment has already been made for this client.</p>  <p> Important Note: If no payment has been made you can now create a claim for payment.</p>
9	<p>While remaining in the Client record, navigate to the Cases sub-tab.</p> 

Steps	Actions
<p>10</p>	<p>Click the Case ID hyperlink to open the Cases screen.</p> 
<p>11</p>	<p>Navigate to the Case Claims sub-tab.</p> 
<p>12</p>	<p>Click the  icon to create a new case claim.</p> 
<p>13</p>	<p>Click the glyph next to the Service Date Start and Service Date End. The Calendar window will open to enter the date.</p> 
<p>14</p>	<p>Use the dropdowns in the box and select the Month and Year.</p>

Steps	Actions
16	<p>Click the drop down arrow next to the Service Provided and select Outer Regional and Remote from the list.</p>  <p>The screenshot shows a web application interface for 'Case Claims'. At the top, there are tabs for 'Actions', 'Assessments', 'Case Claims' (which is active), 'Q&A', 'Supplementary Q&A', and 'Status History'. Below the tabs, there are two main sections: 'Claim Details' and 'Case & Claim Details'. In the 'Claim Details' section, the 'Service Provided' dropdown menu is open, showing 'Outer Regional and Remote' as the selected option. Other fields include 'Claim Status' (Draft), 'Service Date Start' (10/01/2017), 'Service Date End' (10/01/2017), 'Service Category' (OR&R), 'Unit of Measure' (N/A), and 'Qty' (0). The 'Case & Claim Details' section includes 'Eligibility Stream' (AEI), 'Claim Id' (4-3PT15M1), 'Case Id' (4-3PT15KU), 'Case Type' (AEI), 'Client Id' (4-3PQ0AAR), 'Client Last Name' (AUTOMATION1407), 'Client First Name' (TEST36), 'CRN' (497139862V), and 'Date of Birth' (29/11/2010).</p>

Steps	Actions
<p>17</p>	<p>Enter the Total Amount Charged (GST Exclusive) and Amount Claimed (GST Exclusive).</p>  <p>The screenshot shows the 'Case Claims' form with the following fields highlighted in red:</p> <ul style="list-style-type: none"> Total Amount Charged (GST Excl) * Amount Claimed (GST Excl) *
<p>18</p>	<p>Click the drop down arrow next to the GST Code and select Out Of Scope from the list.</p>  <p>The screenshot shows the 'Case Claims' form with the 'GST Code' dropdown menu open. The 'Out Of Scope' option is selected and highlighted in blue.</p>
<p>19</p>	<p>Tick the Family Approved Claim and Payable Claim boxes.</p>

Steps	Actions
	<div style="border: 1px solid gray; padding: 5px;"> <p style="text-align: center;"> Actions Assessments Case Claims Q&A Supplementary Q&A Status History </p> <hr/> <div style="display: flex; justify-content: space-between;"> <div style="width: 45%;"> <p>Claim Details</p> <p>Claim Status * Draft v</p> <p>Service Date Start * 10/01/2017 📅</p> <p>Service Date End * 10/01/2017 📅</p> <p>Service Category * OR&R v</p> <p>Service Provided * Outer Regional ar v</p> <p>Additional Description: v</p> <p>Unit of Measure * N/A v</p> <p>Total Hours: </p> <p>Qty: 0</p> </div> <div style="width: 45%;"> <p>Case & Claim Details</p> <p>Eligibility Stream: AEI v</p> <p>Claim Id * 4-3PT15M1</p> <p>Case Id * 4-3PT15KU</p> <p>Case Type: AEI</p> <p>Client Id: 4-3PQ0AAR</p> <p>Client Last Name: AUTOMATION1407</p> <p>Client First Name: TEST36</p> <p>CRN: 497139862V</p> <p>Date of Birth: 29/11/2010 📅</p> </div> </div> </div>

20 Click the drop down arrow next to the **Claim Status** and select **Ready for Submission** from the list.

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

Claim Details

Claim Status * Draft v

Service Date Start * 10/01/2017 📅

Service Date End * 10/01/2017 📅

Service Category * OR&R v

Service Provided * Outer Regional ar v

Additional Description: v

Unit of Measure * N/A v

Total Hours:

Qty: 0

Case & Claim Details

Eligibility Stream: AEI v

Claim Id * 4-3PT15M1

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 📅

21 Save the record by clicking the (Menu) icon and selecting **Save Record**.

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

Claim Details

Claim Status * Ready for Submi v

Service Date Start * 10/01/2017 📅

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Additional Description: v

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Total Hours:

Qty: 0

Case & Claim Details

Eligibility Stream: AEI v

Claim Id * 4-3PT15M1

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 📅

⚙️

- Undo Record [Ctrl+U]
- Delete Record [Ctrl+D]
- New Record [Ctrl+N]
- Copy Record [Ctrl+B]
- Save Record [Ctrl+S]
- New Query [Alt+Q]
- Run Query [Alt+ENTER]
- Refine Query [ALT+G]
- About Record [Ctrl+Alt+K]
- Record Count [Ctrl+Shift+3]
- Create Bookmark...

Steps	Actions
22	A second employee can now log in and submit the claim for payment. For instructions on how to submit a claim for payment follow the task card Submit a Claim to DSS for Payment .

Need Help?

For further assistance please contact the GPS Helpdesk on 1800 020 283 or email GPS.Helpdesk@communitygrants.gov.au