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.

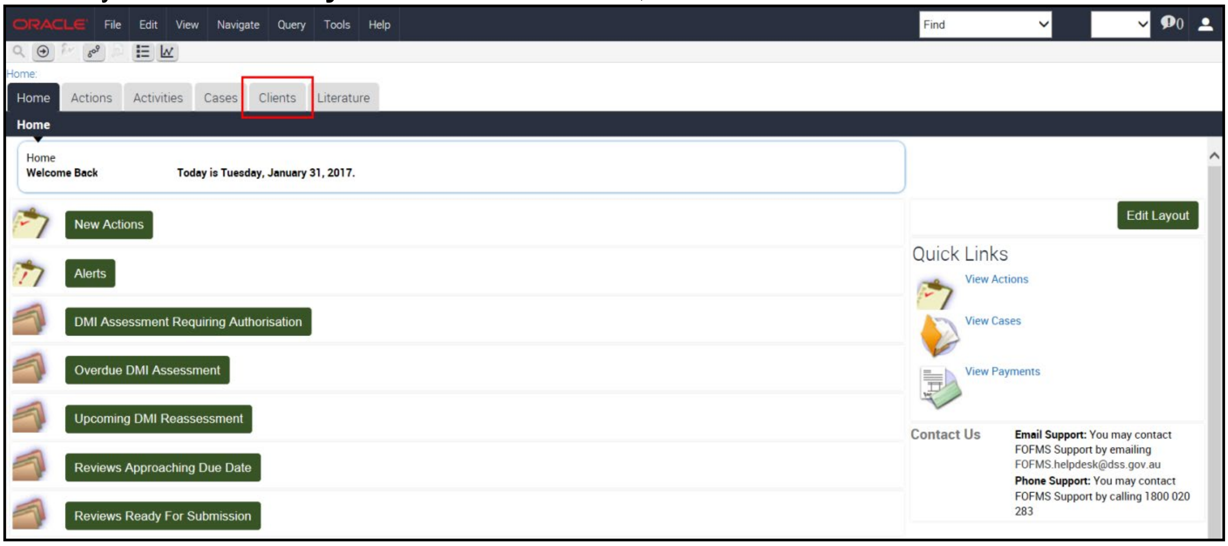
A claim may only be submitted after an Intervention has been delivered.

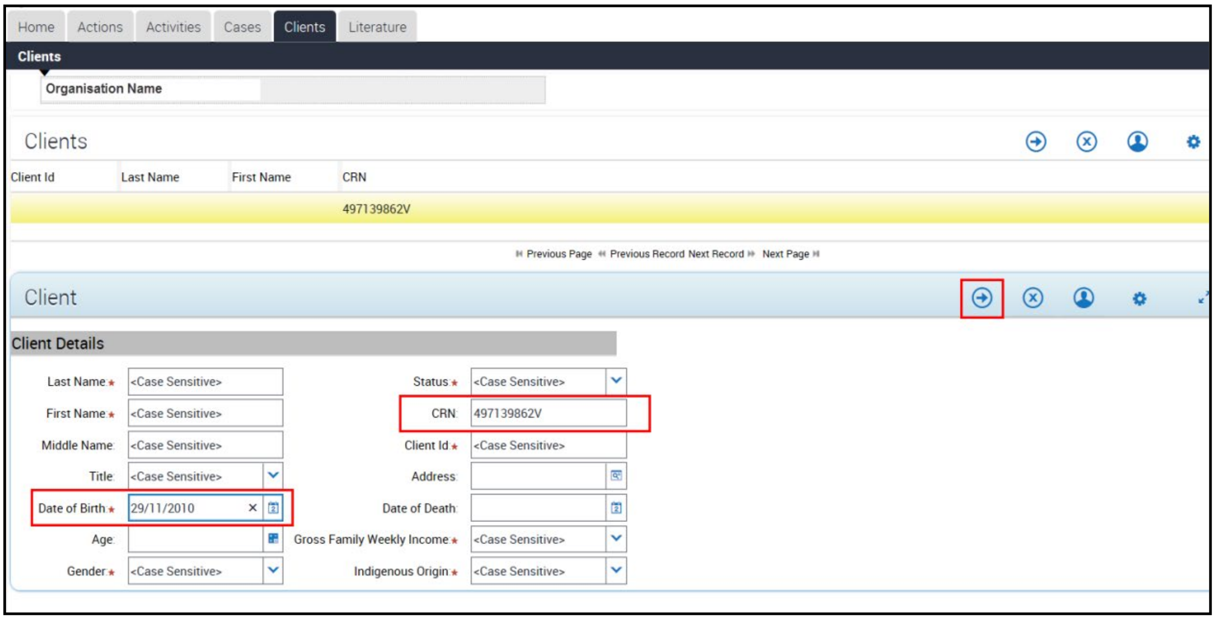
Creating and submitting a claim is a two-step process:

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

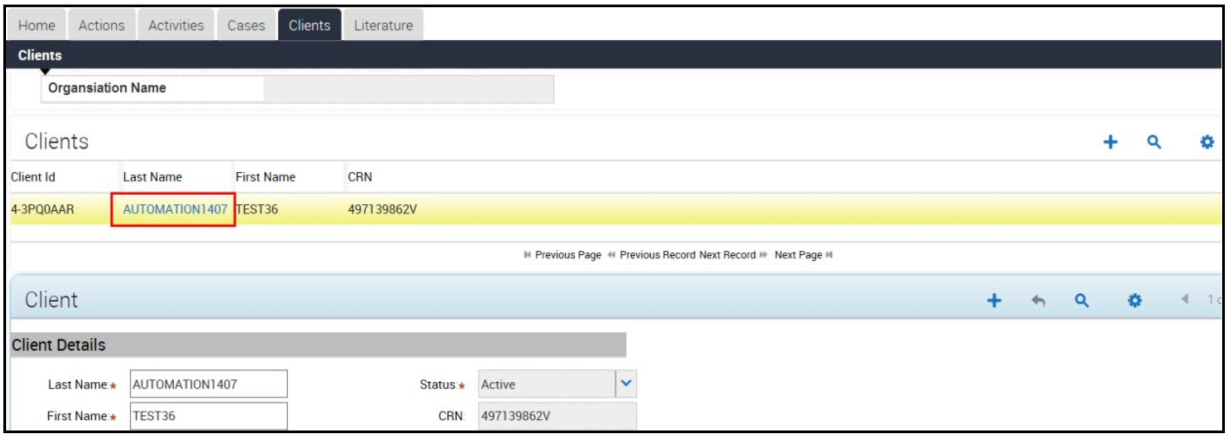
Access the internet and log in to DCP at https://portal.dss.gov.au/fofmsportal

<table>
<tr><th>Steps</th><th>Actions</th></tr>
<tr><td>1</td><td>To verify the client’s Early Intervention Balance, select the Clients screen tab.

</td></tr>
<tr><td>2</td><td>Click the (Query) icon.

</td></tr>
<tr><td>3</td><td>Enter the Customer Reference Number (CRN) and Date of Birth then click the (Go) icon.

</td></tr>
</table>

<table>
<tr><th>Steps</th><th>Actions</th></tr>
<tr><td>4</td><td>
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).



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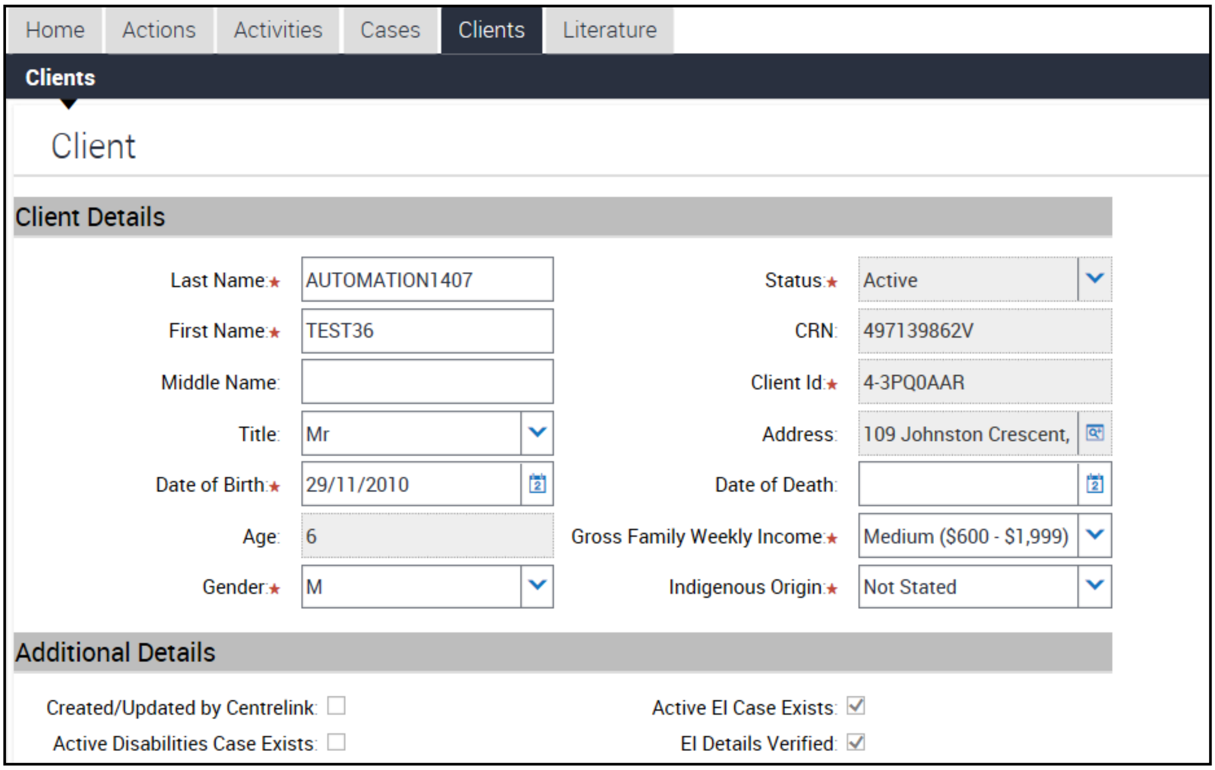
<tr><td>5</td><td>
The Client record will display.



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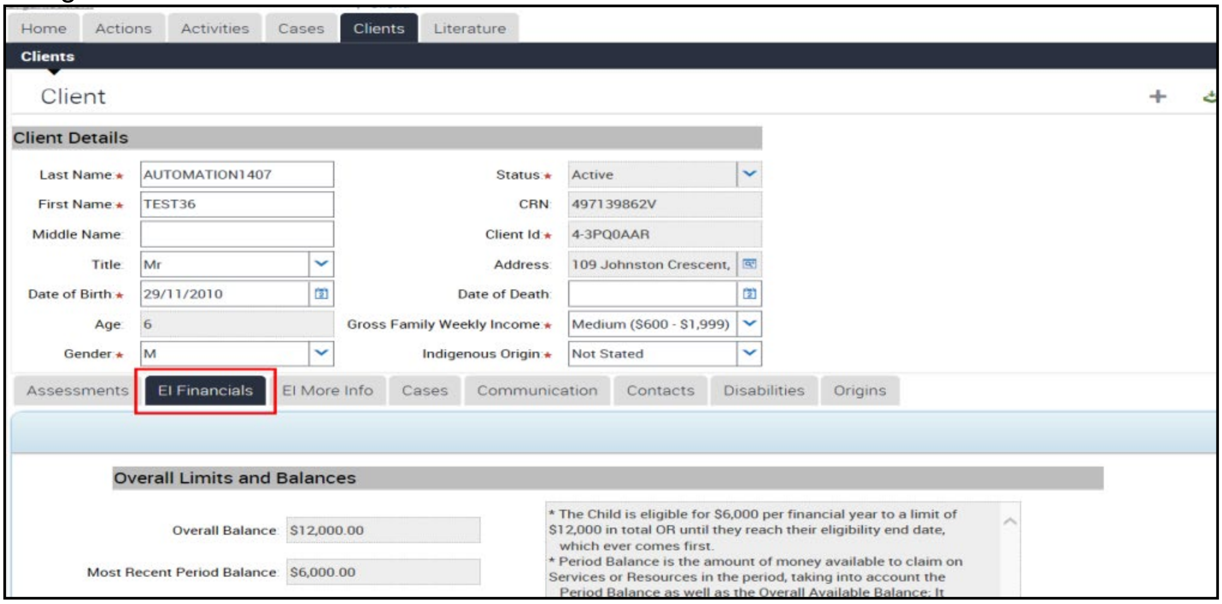
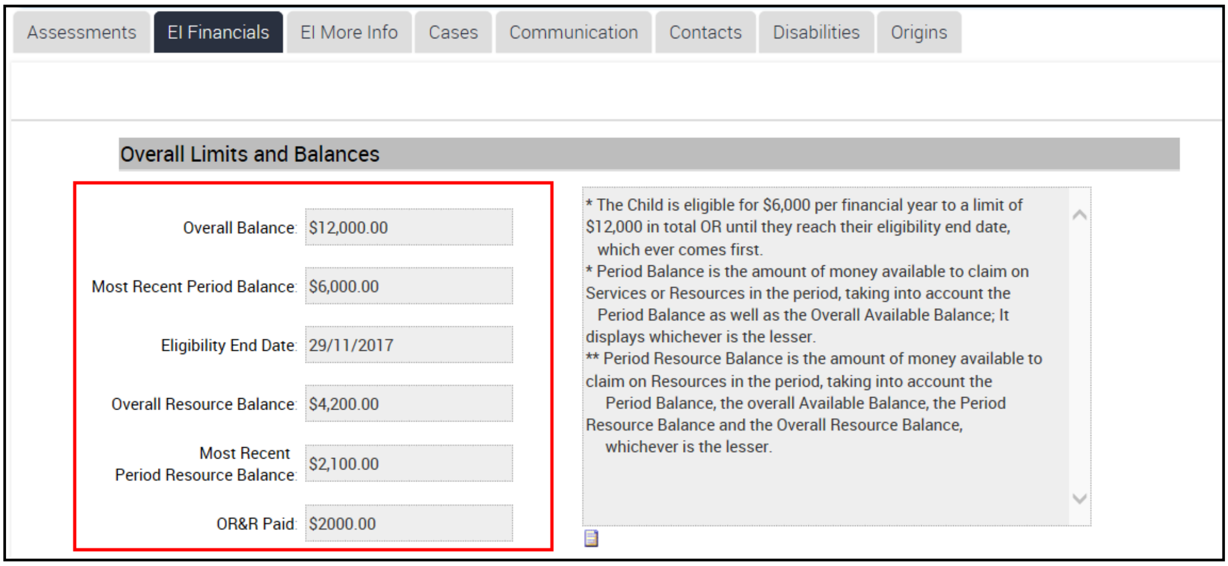
<tr><th>Steps</th><th>Actions</th></tr>
<tr><td>6</td><td>

Navigate to the **EI Financials** view tab.



</td></tr>
<tr><td>7</td><td>

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



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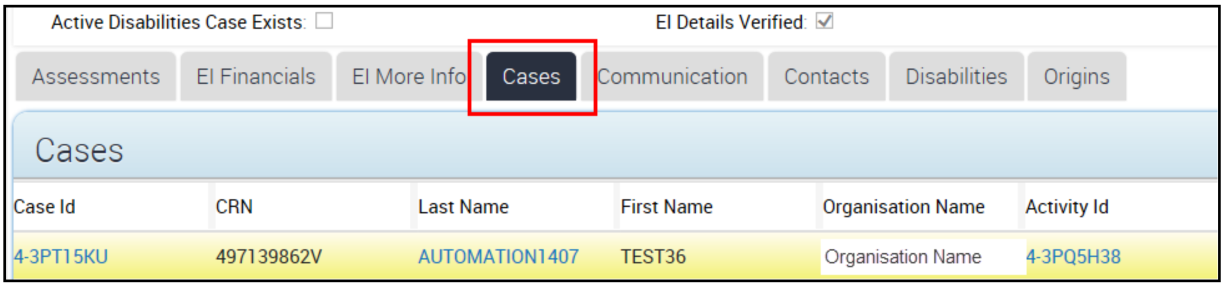
<tr><td>8</td><td>

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

Navigate to the **Cases** view tab.



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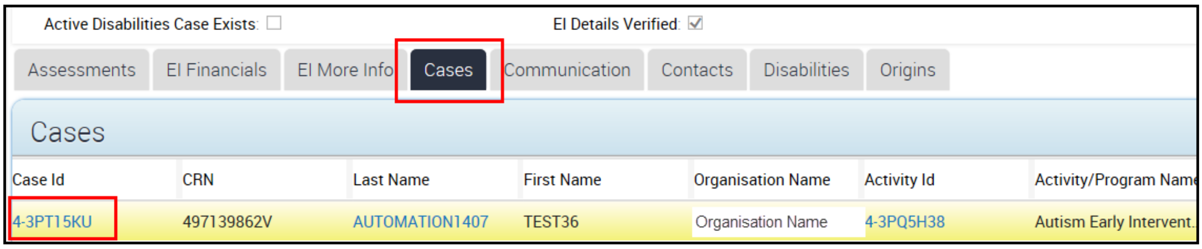
<table>
<tr><th>Steps</th><th>Actions</th></tr>
<tr><td>9</td><td>

To access the **Case** record, select the **Case Id** hyperlink.



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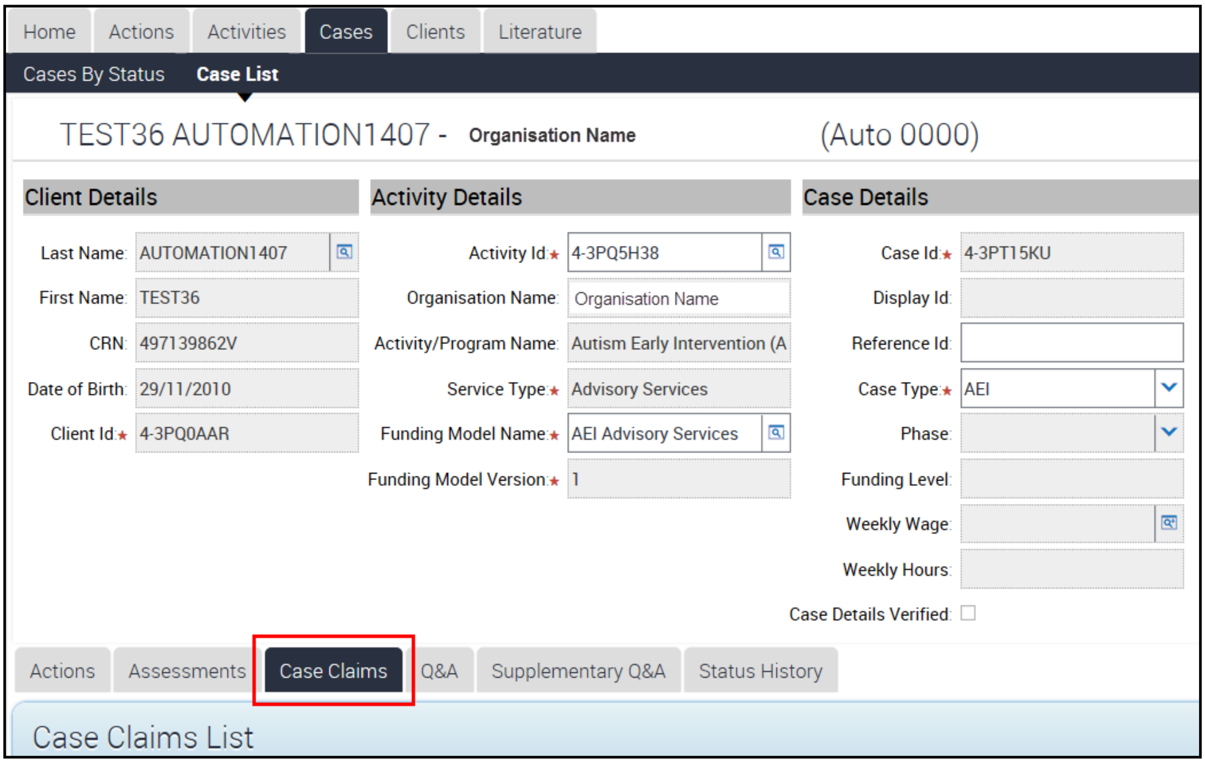
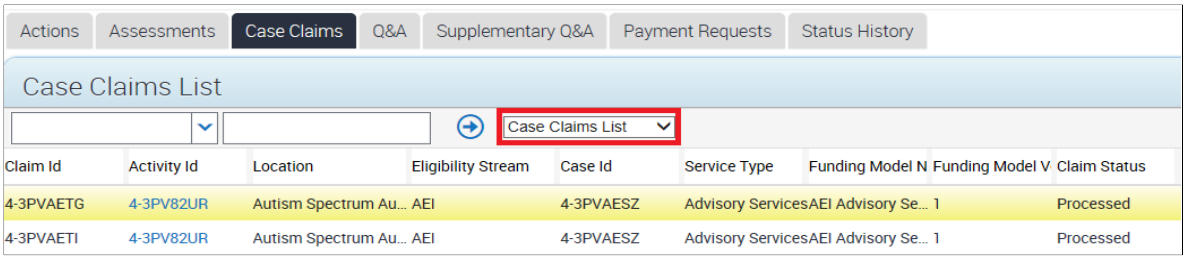
<tr><td>10</td><td>

Navigate to the **Cases Claims** view tab.



</td></tr>
<tr><td>11</td><td>

Select the **Case Claims List** dropdown and change this to **Case Claims Details.**



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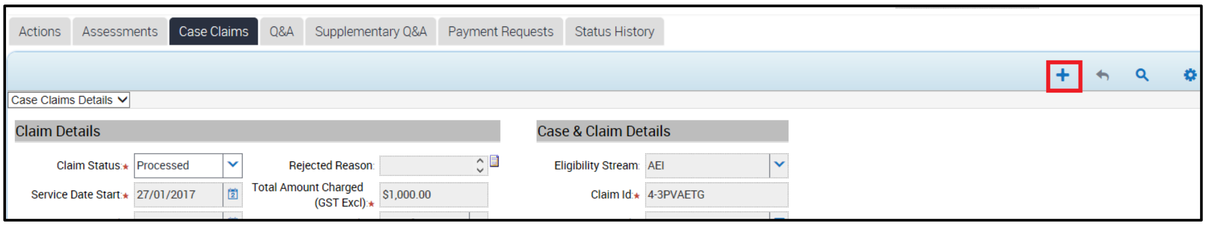
<tr><th>Steps</th><th>Actions</th></tr>
<tr><td>12</td><td>

Click the + (New) icon to create a new case claim.



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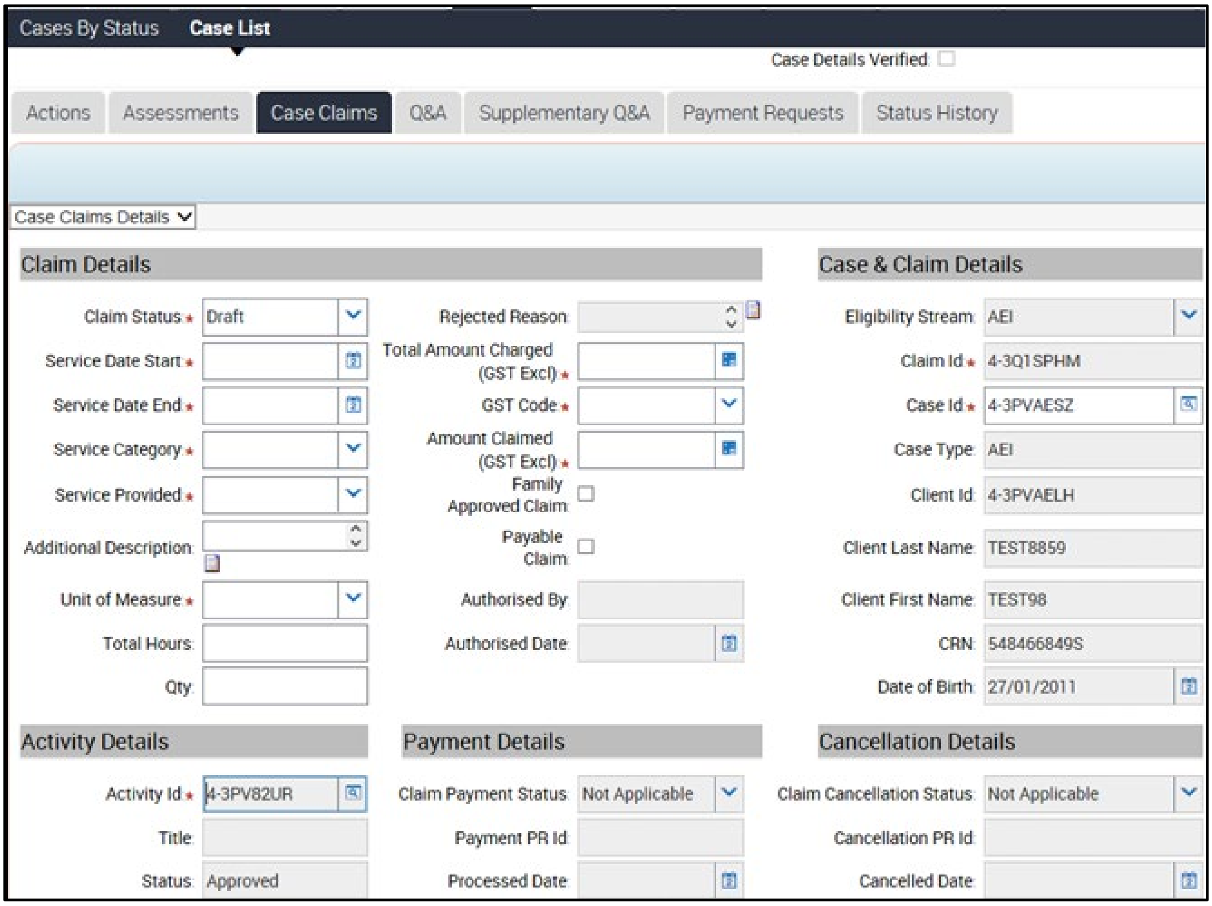
<tr><td>13</td><td>

This will create a blank record and allow you to create a claim for the relevant client.



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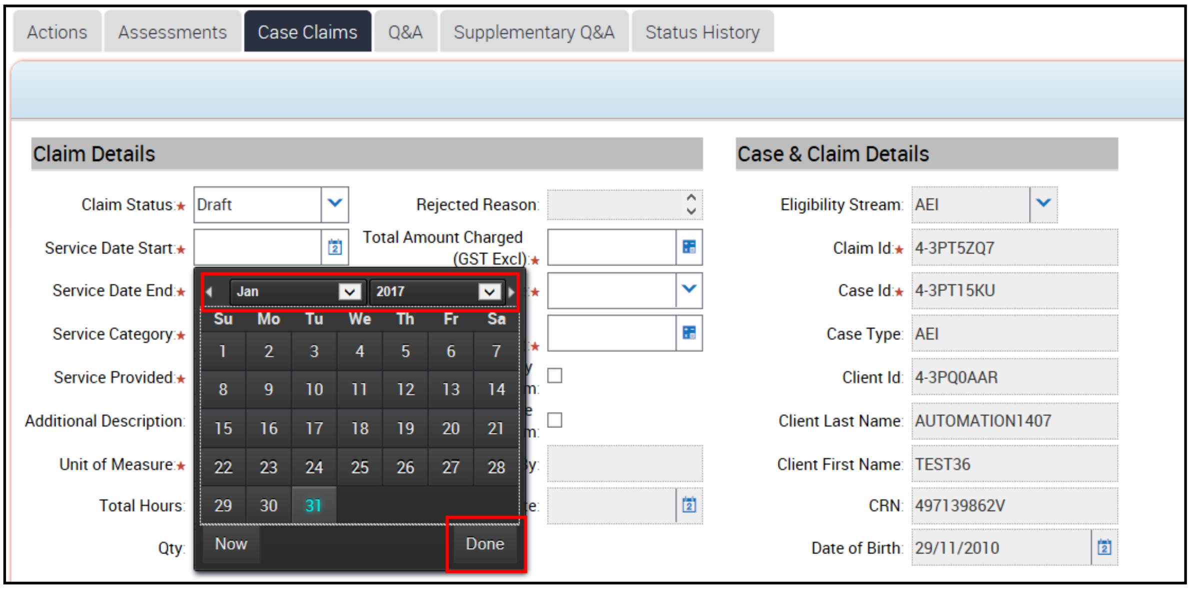
<tr><td>14</td><td>

Use the dropdowns in the box and select the **Month** and **Year.** Click **Done.**



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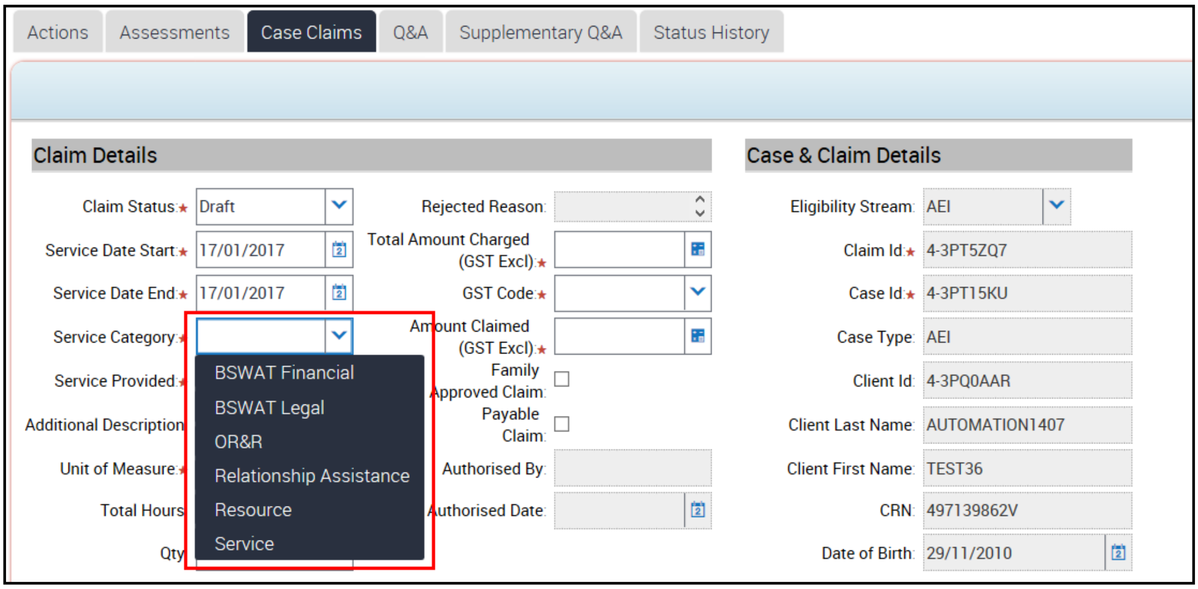
<tr><td>15</td><td>

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



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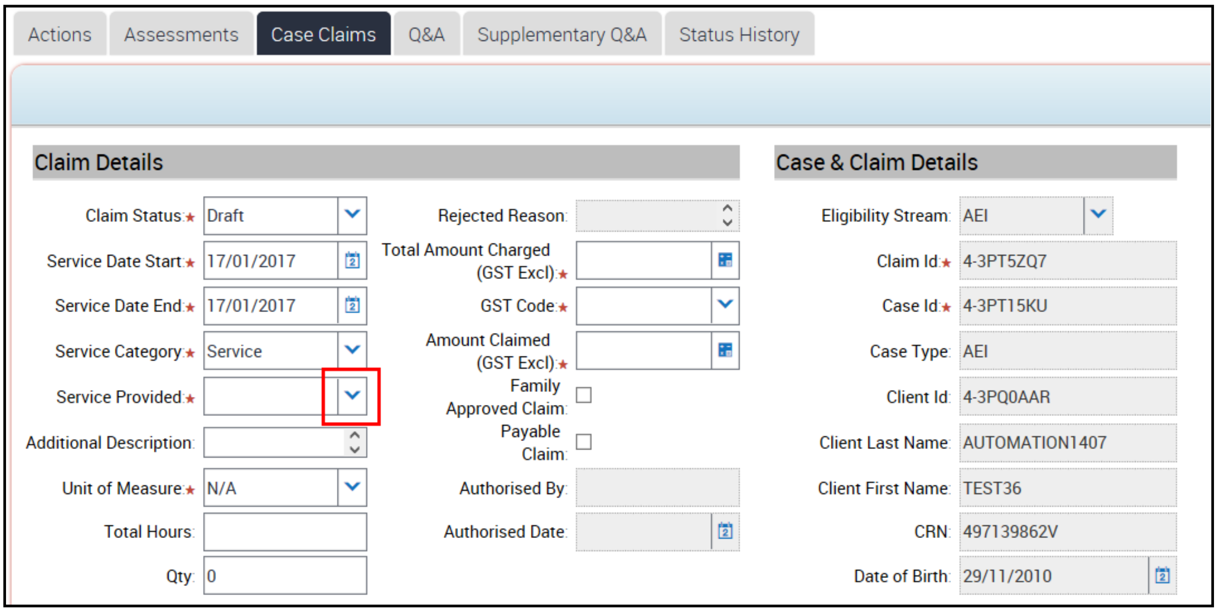
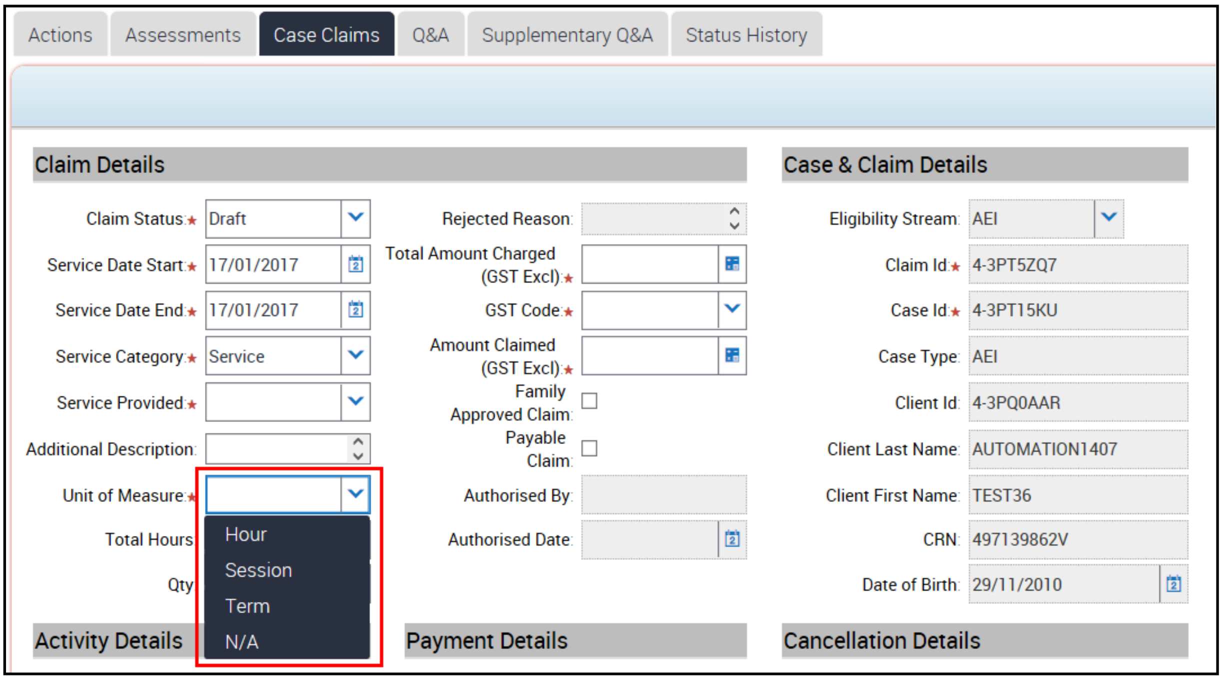
</table>

<table>
<tr><th>Steps</th><th>Actions</th></tr>
<tr><td>16</td><td>Click the arrow next to the Service Provided and from the list select the service you are claiming for.

</td></tr>
<tr><td>17</td><td>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.

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</table>

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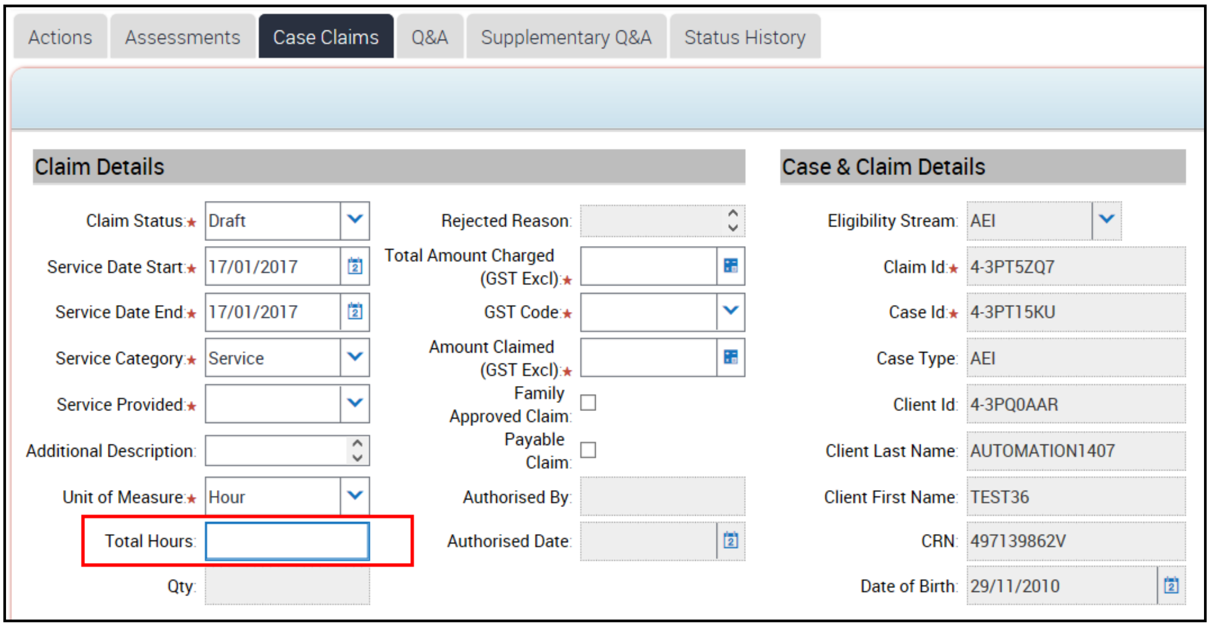
<tr><td>18</td><td>

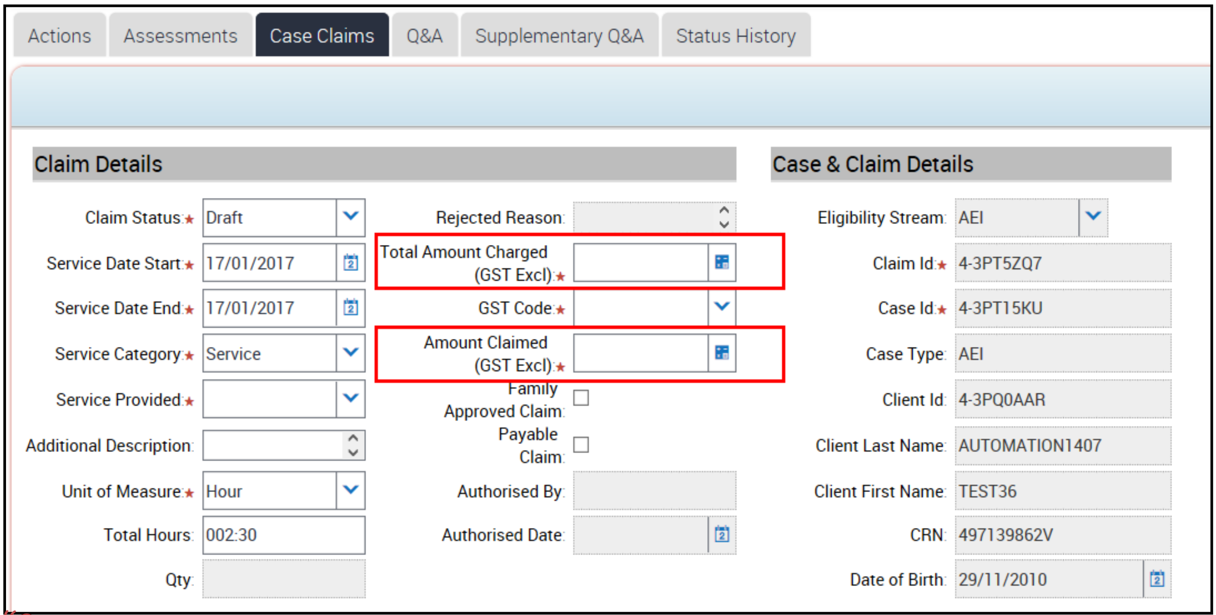
If you selected Hour for the Unit of Measure enter the **Total Hours.**



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).

</td></tr>
<tr><td>19</td><td>

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



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

</td></tr>
</table>

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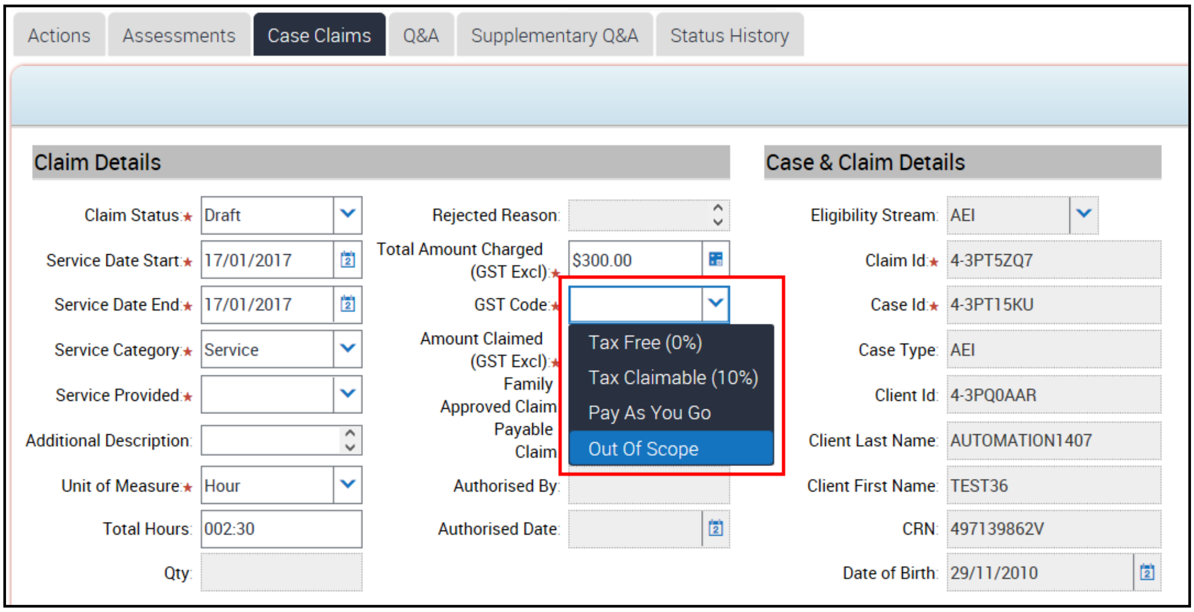
<tr><td>20</td><td>

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



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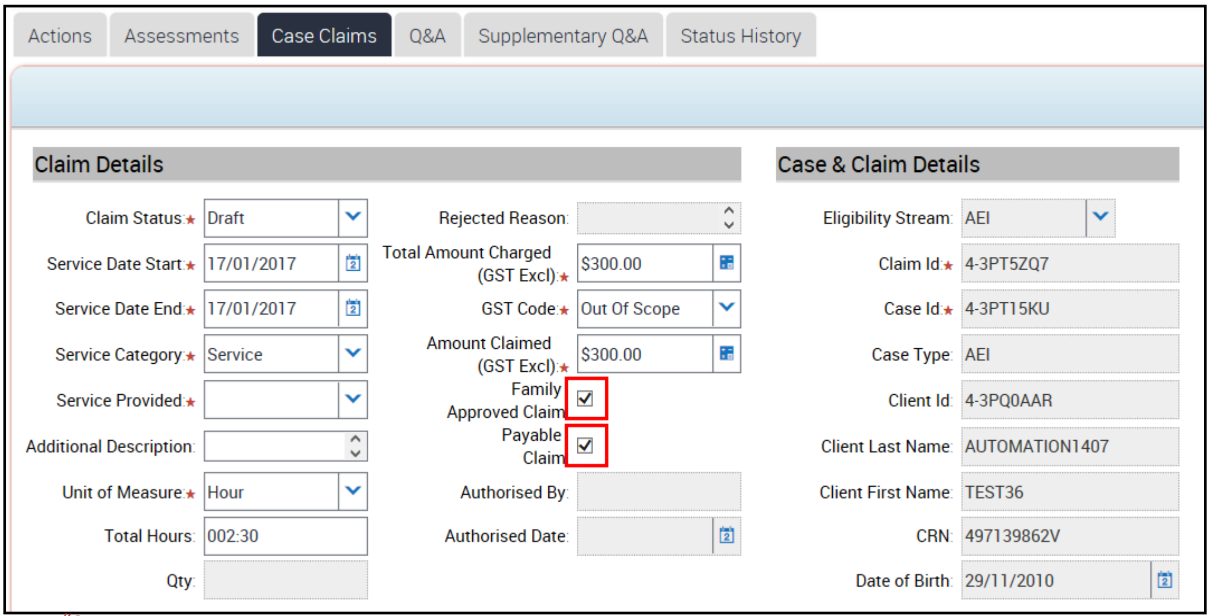
<tr><td>21</td><td>

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



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

</td></tr>
</table>

<table>
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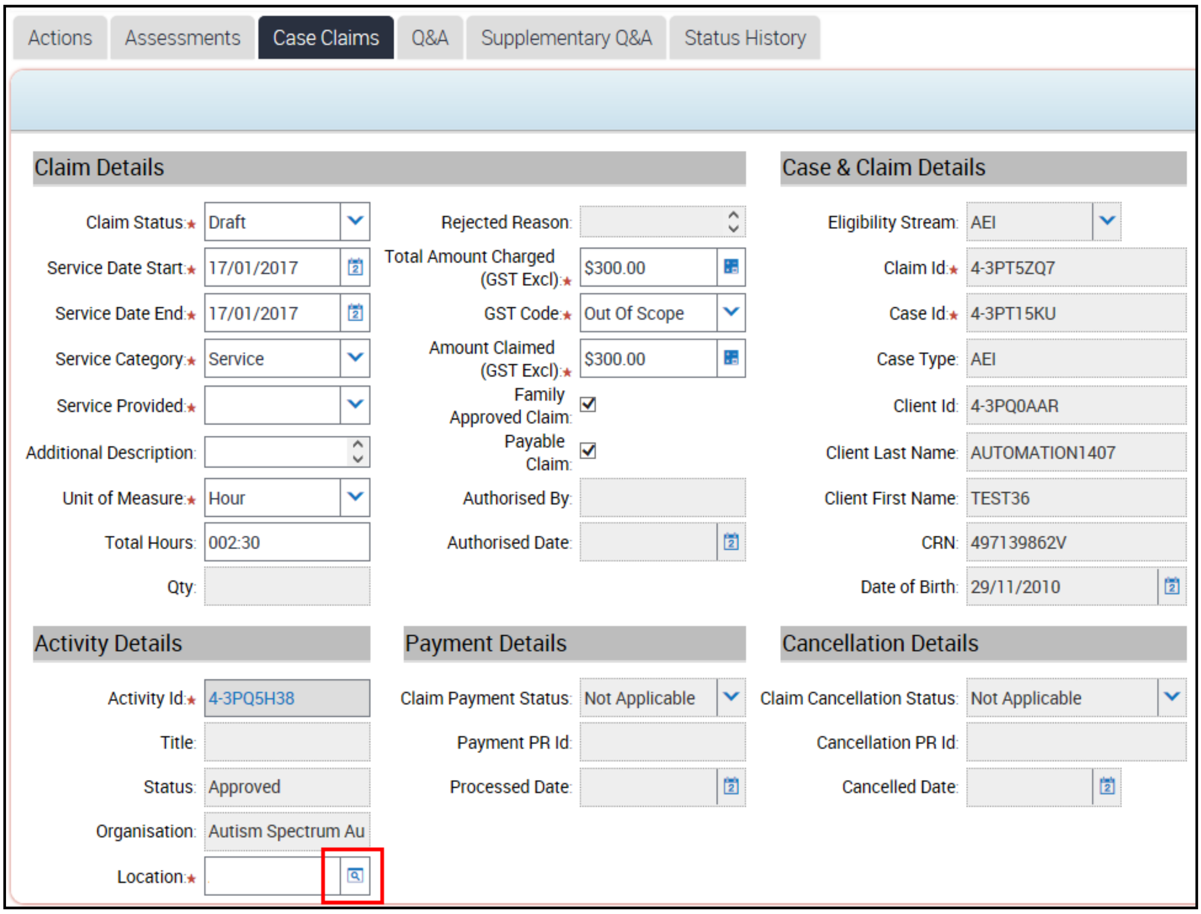
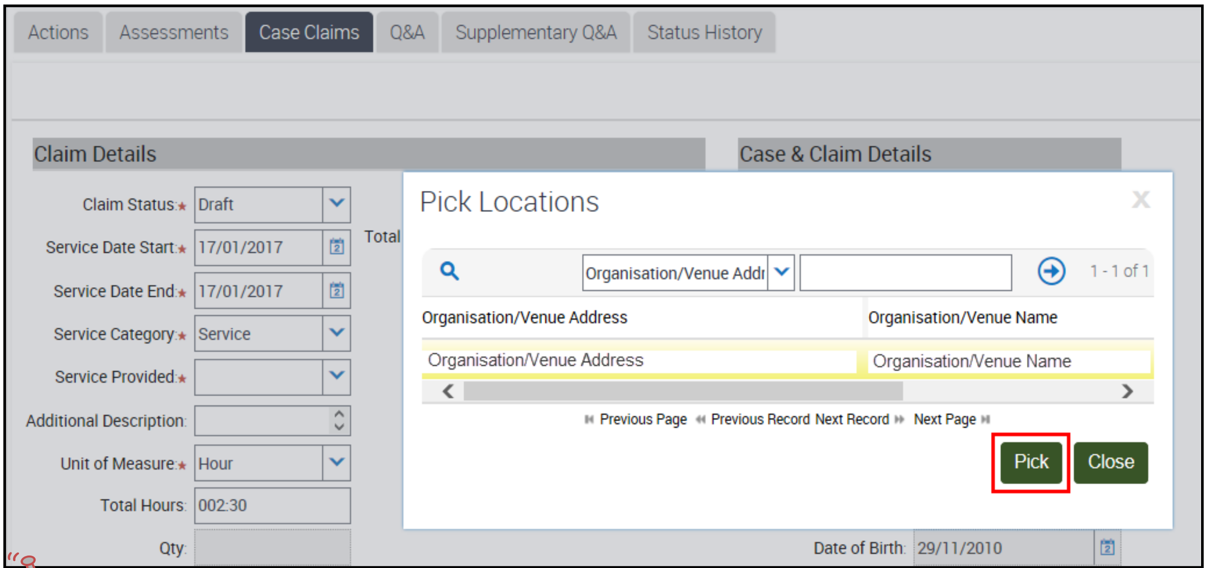
<tr><td>22</td><td>Click the Glyph located next to the Location field.

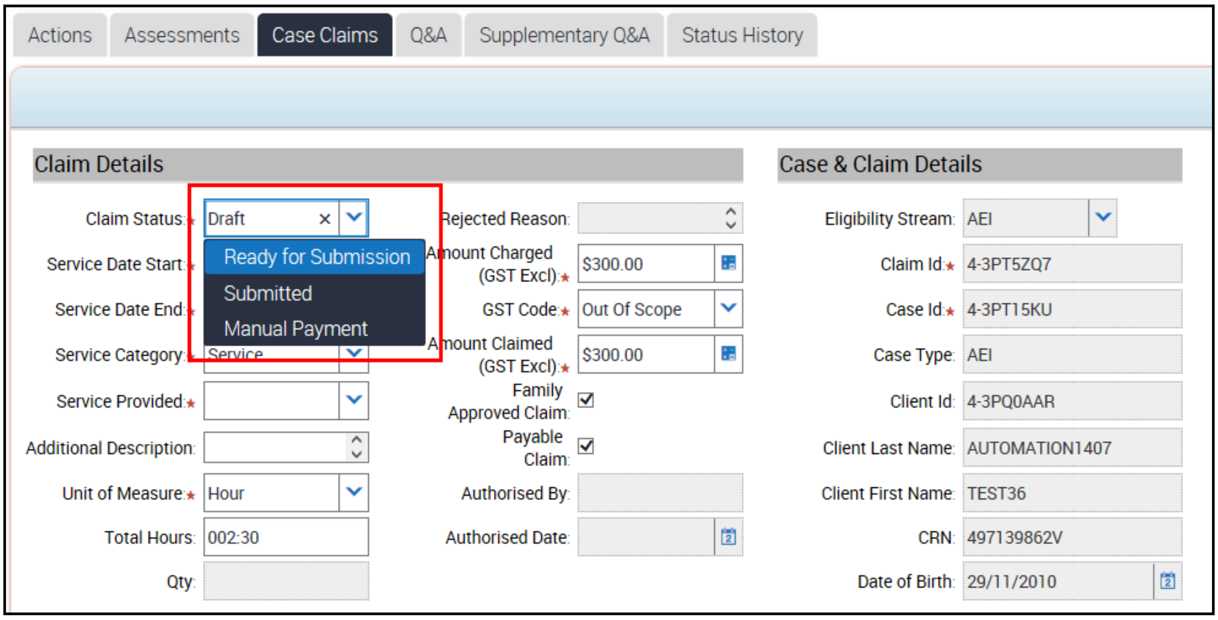


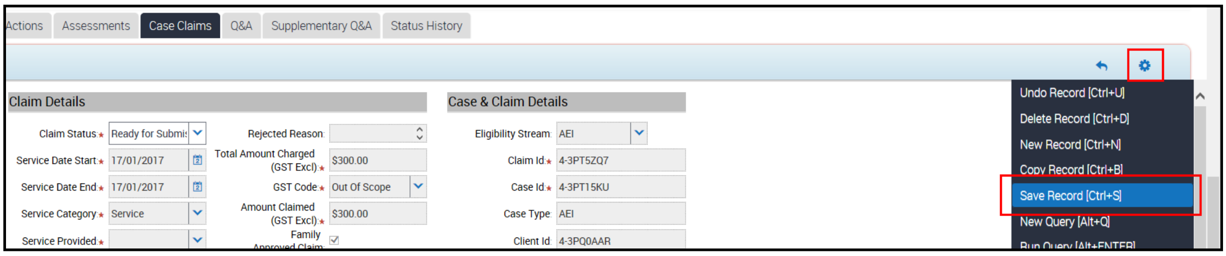
</td></tr>
<tr><td>23</td><td>A popup box will appear. From the options provided, select the Location in which the service was delivered from and click on Pick. For outreach services, select the main office of clinic address.



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.</td></tr>
</table>

<table>
<tr><th>Steps</th><th>Actions</th></tr>
<tr><td>24</td><td>Click the arrow next to the Claim Status and select Ready for Submission from the list.


</td></tr>
<tr><td>25</td><td>Save the record by clicking the (Menu) icon and selecting Save Record.


</td></tr>
<tr><td>26</td><td>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.</td></tr>
</table>

Need Help?

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