

# Grant Claims

## Overview

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**Introduction** This chapter explains how to find, save, and submit a claim.

You can also look up your existing claims and invoices, and adjust a claim if required.

Topic	See Page
Introduction to Invoices and Claims	2
Sections of a Claim	4
How to Submit a New Claim	5
How to Submit a Saved Claim	8
How to find a Submitted Claim: Claim Enquiry = Tax Invoice	10
How to find a Proforma Invoice	12
Adjustments to Claims	14
How to Adjust a Claim	15

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# Introduction to Invoices and Claims

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**Description** When Legal Aid NSW grants an application for legal aid, the *Grants Online* system will generate pro forma invoices that you need to complete and submit for payment.

Each pro forma invoice contains the items you are eligible for claim for that particular matter.

When you complete and submit a pro forma invoice, this is referred to as ‘making a claim for payment’ or ‘a claim’.

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**Example:**

One pro forma invoice may contain an item for *Family Court Interim Hearing* expenses, another may contain an item for *Family Law Conferencing* expenses, and yet another may contain an item for *Care and Protection Stage 3(a)* expenses.

**When to claim**

You need to complete and submit the invoice at the conclusion of the stage for which aid was granted.

**How to claim**

When you are ready to make the claim, you will need to take the following steps to complete and submit an invoice:

Use the **Submit New Claim** function on the tool bar to submit a claim.

Stage	Description
1	Find the pro forma invoice on the <i>Grants Online</i> system.
2	Type in the amounts you are claiming.
3	Enter a few fields, eg. Claim Date and Claim Reference
4	Submit the claim for processing.
5	Payment is usually sent to within a few days.

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## Introduction to Invoices and Claims, Continued

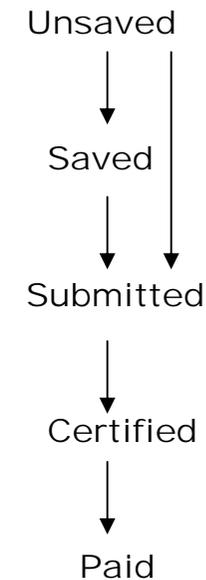
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### Life cycle of an invoice

As the invoice for Legal Aid passes through the different stages of the Grants Online processing, the status of the invoice will change from **Active** to **Finalised**.

Status	Stage	Comments
<b>Active</b>	Unsaved (Grant)	The <i>Grants Online</i> system has generated a blank pro forma invoice.
<b>Active</b>	Saved	You have saved—but <i>not submitted</i> —the invoice payment claim.
<b>Active</b>	Submitted	You have submitted the invoice payment claim.
<b>Finalised</b>	Certified	The claim has been certified.
<b>Finalised</b>	Paid	Legal Aid NSW has paid the invoice. You can submit an adjustment to the claim, if required.

The table and diagram below show the life cycle of an invoice as it passes through each stage.



### Invoice Numbers

As soon as Legal Aid NSW grants the application, the *Grants Online* system generates one or more pro forma invoices and assigns each one a unique number.

Legal Aid NSW will quote all relevant invoice numbers in the letter / email it sends to your firm when advising the application's success.

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# Sections of a Claim

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**Description** There are several distinct sections of the pro forma invoice. These are described in more detail in the table below.

Section	Contains
<b>Reference</b>	<ul style="list-style-type: none"> <li>• The Claim ID number will automatically display once you have saved or submitted the claim</li> <li>• Claim status</li> <li>• Invoice ID number</li> <li>• Client and file details</li> <li>• Assigned Practitioner details</li> </ul>
<b>Claim Details</b>	<ul style="list-style-type: none"> <li>• Date of the claim</li> <li>• Your firm's invoice reference</li> <li>• Indications whether this is the final invoice for this case or for this invoice</li> <li>• Name of the Practitioner who completed the work covered by the invoice</li> </ul>
<b>Work Items (Fees and Disbursements)</b>	These are the expenses – the fees and disbursements – you are claiming.
<b>Certification</b>	Your certification that the claim is correct and your acknowledgement that the claim and file are subject to audit by the Legal Aid NSW.

*Continued on next page*

# How to Submit a New Claim

**Example** An example of an invoice is shown below.

**Description** You will need to complete the following three areas of the proforma invoice when you want to submit a claim for payment:

- **Claim Details**
- **Work Items**
- **Certification.**

These are shown highlighted on the proforma invoice below.

**Note:**

When you save or submit your claim, a unique **Claim ID** number will automatically generate at the top of the claim. You can use this number in subsequent transactions to locate this claim.

**Note:** The highlighted areas indicate the areas that need to be completed when submitting a claim.

**Submit Payment Claim**
Save Submit Claim Back To Search

Hide Menu

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Claim ID  
Claim Status  
Proforma Invoice ID 9136423  
File/Ext 09F008844/1  
Client Name BETTY WONDERLAND  
File Reference  
Assigned Service Provider TEST OFFICE 1  
Business Address 1 TEST RD DUNDAS NSW 2117

Office ABN 54117567085  
Registered For GST YES

---

**Claim Details**

Payee Service Provider TEST OFFICE 1

Business Address 1 TEST RD DUNDAS NSW 2117

Claim Date\* 27/03/2009

Your Claim Reference\*

Final Claim for this File? NO

Final Claim for Proforma Invoice? NO

Practitioner who performed work

File Outcome Recorded NO  
Office ABN 54117567085  
Registered For GST YES

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**Work Items**

Grant of Aid		Rates Available		This Claim				
Code	Work Type	Effective Date Range	Unclaimed Available Amounts (Exclusive of GST)	Units to be Claimed	Exclusive Amount to be Claimed	GST	Inclusive Amount to be Claimed	Service Dates
PD01	DISBURSEMENT GENERAL	27/03/2009 to current	FIXED \$100.00	<input type="text" value=""/>	<input type="text" value="0.00"/>	0.00	<input type="text" value="0.00"/>	
PD10	TRANSLATION FEES	27/03/2009 to current	FIXED \$500.00	<input type="text" value=""/>	<input type="text" value="0.00"/>	0.00	<input type="text" value="0.00"/>	
PF88	ALL WORK FOR SCOPE OF AID	27/03/2009 to current	LUMP SUM FEE \$780.00	<input type="text" value=""/>	<input type="text" value="0.00"/>	0.00	<input type="text" value="0.00"/>	
Total					<input type="text" value="\$0.00"/>	<input type="text" value="\$0.00"/>	<input type="text" value="\$0.00"/>	

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**Claim and Contra Contribution Total**

Exclusive Amount \$0.00  
 GST \$0.00  
 Inclusive Amount \$0.00  
 Contribution Deducted \$0.00  
 Net to be Paid \$0.00  
 Contribution Remaining \$75.00

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**Certification**

I,  of TEST OFFICE 1

- Certify that this claim is correct and accurately reflects the services undertaken and disbursements incurred
- Acknowledge that this claim and the file are subject to audit by Legal Aid NSW.

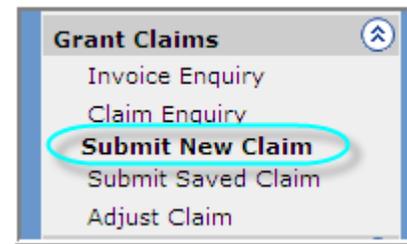
Submitted By TEST ONE

## How to Submit a New Claim, continued

Follow the steps below to create a new claim.

This claim can then be **submitted** or **saved**, as required.

- | Step | Action  |
|------|---|
| 1    | Log into <i>Grants Online</i> .<br>The Grants Online <b>Home Page</b> displays.   |
| 2    | Select <b>Submit New Claim</b> from the <b>Grant Claims</b> section on the tool bar.<br>The <b>Search for a Proforma Invoice</b> page displays, showing the <b>Criteria</b> and <b>Advanced Criteria</b> sections.  |
| 3    | Type in the search criteria you have on hand, for example, the <b>Claim ID</b> , or <b>Proforma Invoice ID</b> or <b>File ID</b> , into the corresponding fields. Or click on the <b>Client Id Pick List</b> icon to search on the client's name and ID number. |
| 4    | Click the <b>Search</b> button in the top window button bar.<br>A list of client names matching your search criteria will display in the <b>Search Results</b> .  |
| 5    | Click on the <b>Invoice ID</b> number in the <b>Search Results</b> for the invoice you require. (This will display as a blue hyperlink in the <b>Invoice</b> column.)<br>The claim details display on the <b>Submit Payment Claim</b> page.                     |



Search for a Proforma Invoice

Hide Menu

**Criteria**

Proforma Invoice ID

Your File Reference

Client ID

File ID  Ext

Office

**Advanced Criteria**

Invoice Date between  and  Proforma Invoice Status

Organisation

**Search Results**

Invoice	File / Ext	Your File Ref	Date of Grant	Primary File Matter	Service Provider Office	Client	Status	Scope
<a href="#">9136421</a>	09F008844/0		27/03/2009	SPEND TIME WITH	TEST OFFICE 1	WONDERLAND, BETTY	ACTIVE	UNITEMISED DISBURSEMENTS SUCH AS PHOTOCOPYING AND FAXES, INTERPRETER FEES, COMMERCIAL AGENT FEE FOR SERVICE OF DOCUMENTATION., EXPENDITURE OF CONDUCT MONEY IN THE COURSE OF ISSUING SUBPOENAE., FAMILY COURT - REPRESENTATION TO CONCLUSION OF PROCEDURAL HEARING
<a href="#">9136423</a>	09F008844/1		27/03/2009	SPEND TIME WITH	TEST OFFICE 1	WONDERLAND, BETTY	ACTIVE	UNITEMISED DISBURSEMENTS SUCH AS PHOTOCOPYING AND FAXES, COSTS OF THE SERVICES OF A TRANSLATOR FOR THE PURPOSES OF TRANSLATING A DOCUMENT, FAMILY COURT - REPRESENTATION FOLLOWING THE PRE-TRIAL CONFERENCE TO THE EVE OF TRIAL

Continued on next page

# How to Submit a New Claim, continued

- | Step | Action   |
|------|--|
| 6    | <p>In the <b>Submit Payment Claim</b> page, complete the following fields in the <b>Claim Details</b> section, as follows. Note; Claim Date populates to today's date.</p> <ul style="list-style-type: none"> <li>• Enter your firm's unique invoice reference, up to ten characters into <b>Your Claim Reference</b></li> <li>• Select <b>Yes</b> or <b>No</b>, to <b>Final Claim for this File?</b></li> </ul> <p><b>Warning:</b> If you select <b>Yes</b>, the Record File Outcome button appears which will trigger a file closure process, and you cannot submit an extension or any other application for this file. There may also be delays in payment if you submit any further claims for payment.</p> <ul style="list-style-type: none"> <li>• Select <b>Yes</b> or <b>No</b>, to <b>Final Claim for Proforma Invoice?</b></li> </ul> <p><b>Note:</b> Yes must be selected if yes was selected in the previous question.</p> <ul style="list-style-type: none"> <li>• Enter the <b>Practitioner who performed work</b></li> </ul> |
| 7    | <p>In the Work Items section</p> <ul style="list-style-type: none"> <li>• Enter <b>Units to be Claimed</b> - if the field is available</li> <li>• Enter <b>Exclusive amount to be claimed</b> or <b>Inclusive</b> field</li> <li>• Enter first court date and last court in both the <b>Service Dates</b> fields – if the fields are available.</li> </ul>   |
| 8    | <p>Check the <b>Claims Details</b> section for deductions of contributions and claim totals.</p>   |
| 9    | <p>Click on the <b>Pick List</b> next to the <b>Certification</b> fields to find the practitioner's name who certifies the claim. Note: the Pick List must be selected for the saving or the submission of the claim otherwise an error will appear.</p>   |
| 10   | <p>Click the <b>Submit</b> or <b>Save</b> button</p> <p>A message will appear <b>"Claim was submitted successfully"</b> or <b>"Claim was saved successfully"</b></p>   |

**Submit Payment Claim**
Save Submit Claim Back To Search

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Hide Menu

Claim ID  
Claim Status  
Proforma Invoice ID 9106515  
File/Ext 09F007761/1  
Client Name ALICE WONDERLAND  
File Reference  
Assigned Service Provider TEST OFFICE 1  
Business Address 1 BUSINESS ST SYDNEY NSW 1001  
Office ABN 42383910799  
Registered For GST YES

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Claim Details

Payee Service Provider TEST OFFICE 1  
Business Address 1 BUSINESS ST SYDNEY NSW 1001  
Claim Date\* 27/03/2009  
File Outcome Recorded NO  
Office ABN 42383910799  
Registered For GST YES

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Your Claim Reference\* ALICE12345  
Final Claim for this File? NO  
Final Claim for Proforma Invoice? NO  
Practitioner who performed work MICHAEL ONE

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Work Items

Code	Work Type	Effective Date Range	Rates Available	This Claim			Service Dates
				Unclaimed Available Amounts (Exclusive of GST)	Units to be Claimed	Exclusive Amount to be Claimed	
PD01	DISBURSEMENT GENERAL	27/03/2009 to current	FIXED \$100.00		100.00	10.00	110.00
PD03	INTERPRETER FEES	27/03/2009 to current	FIXED \$500.00		150.00	15.00	165.00
PF80	PREP AND ATTEND	27/03/2009 to current	LUMP SUM FEE \$1170.00		1170.00	117.00	1287.00
<b>Total</b>					\$1420.00	\$142.00	\$1562.00

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Claim and Contra Contribution Total

Exclusive Amount \$1420.00  
GST \$142.00  
Inclusive Amount \$1562.00  
Contribution Deducted \$0.00  
Net to be Paid \$1562.00  
Contribution Remaining \$0.00

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Certification

I, TEST ONE of TEST OFFICE 1

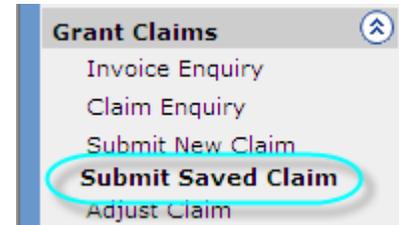
- Certify that this claim is correct and accurately reflects the services undertaken and disbursements incurred
- Acknowledge that this claim and the file are subject to audit by the Legal Aid Commission of New South Wales

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Submitted By TEST ONE

# How to Submit a Saved Claim

- | Step | Action  |
|------|---|
| 1    | Log into <i>Grants Online</i> .<br>The Grants Online <b>Home Page</b> displays.   |
| 2    | Select <b>Submit Saved Claim</b> from the <b>Grant Claims</b> section on the tool bar.<br>The <b>Search for a Claim</b> page displays, showing the <b>Criteria</b> and <b>Advanced Criteria</b> sections. |
| 3    | Type in the search criteria you have on hand, for example, the <b>Claim ID</b> , or <b>Proforma Invoice ID</b> or <b>File ID</b> , into the corresponding field.  |
| 4    | Click the <b>Search</b> button in the top window button bar.<br>A list of <b>Claim ID</b> numbers matching your search criteria will display in the <b>Search Results</b> .                               |
| 5    | Locate the claim you require in the <b>Search Results</b> .   |
| 6    | Click on the <b>Claim ID</b> number in the <b>Search Results</b> for the invoice you require. (This will display as a blue hyperlink in the <b>Claim</b> column.)   |



Search for a Claim

[Hide Menu](#)

**Criteria**

Claim ID

Proforma Invoice ID

File ID  Ext

Claim Date Between  and

Your Claim Reference

Client ID

**Advanced Criteria**

**Search Results**

Claim	Transaction Group ID	File/Ext	Proforma Invoice	Claimed Date	Inclusive Claimed Amount	Service Provider	Client	Status	Scope	Your Claim Ref	Type
<a href="#">9136064</a>	9136085	09F008844/1	9136423	27/03/2009	1133.00	TEST OFFICE 1	WONDERLAND, BETTY	SAVED	UNITEMISED DISBURSEMENTS SUCH AS PHOTOCOPYING AND FAXES, COSTS OF THE SERVICES OF A TRANSLATOR FOR THE PURPOSES OF TRANSLATING A DOCUMENT, FAMILY COURT - REPRESENTATION FOLLOWING THE PRE-TRIAL CONFERENCE TO THE EVE OF TRIAL	BETTY12345	CLAIM

*Continued on next page*

## How to Submit a Saved Claim, Continued

- 7 The **Submit Saved Claim** page appears populated with details previously saved.  
Complete, amend or update any details (refer to **Submit a New Claim** for information)
- 8 Click the **Submit Claim** button in the top button bar.  
The claim will be submitted to Legal Aid NSW immediately.  
A message will display at the top of the page to let you know that your claim has been successfully submitted.  
Note: If you decide to delete the claim instead, click the **Delete** button in the top button bar.
- 9 If you need to return to the original **Search Results** list, click the **Back to Search** button on the top button bar.
- 10 To close out of this window, do one of the following:
  - Select another function from the tool bar
  - Log out of *Grants Online*.

### Submit Saved Claim

Hide Menu

Claim ID	9136064	
Claim Status	SAVED	
Proforma Invoice ID	9136423	
File/Ext	09F008844/1	
Client Name	BETTY WONDERLAND	
File Reference		
Assigned Service Provider	TEST OFFICE 1	
Business Address	1 TEST RD DUNDAS NSW 2117	Office ABN 54117567085 Registered For GST YES

**Claim Details**

Payee Service Provider	TEST OFFICE 1	
Business Address	1 TEST RD DUNDAS NSW 2117	File Outcome Recorded NO Office ABN 54117567085 Registered For GST YES
Claim Date*	27/03/2009	
Your Claim Reference*	BETTY12345	
Final Claim for this File?	NO	
Final Claim for Proforma Invoice?	NO	
Practitioner who performed work	TEST ONE	

**Work Items**

Code	Work Type	Grant of Aid	Rates Available		This Claim					
			Effective Date Range	Unclaimed Available Amounts (Exclusive of GST)	Units to be Claimed	Exclusive Amount to be Claimed	Inclusive Amount to be Claimed	Service Dates		
PD01	DISBURSEMENT GENERAL		27/03/2009 to current	FIXED \$100.00		100.00	10.00	110.00		
PD10	TRANSLATION FEES		27/03/2009 to current	FIXED \$500.00		150.00	15.00	165.00		
PF88	ALL WORK FOR SCOPE OF AID		27/03/2009 to current	LUMP SUM FEE \$780.00		780.00	78.00	858.00		
					<b>Total</b>		\$1030.00	\$103.00	\$1133.00	

**Claim and Contra Contribution Total**

Exclusive Amount	\$1030.00
GST	\$103.00
Inclusive Amount	\$1133.00
Contribution Deducted	\$75.00
Net to be Paid	\$1058.00
Contribution Remaining	\$0.00

**Certification**

I,   of TEST OFFICE 1

- Certify that this claim is correct and accurately reflects the services undertaken and disbursements incurred
- Acknowledge that this claim and the file are subject to audit by Legal Aid NSW.

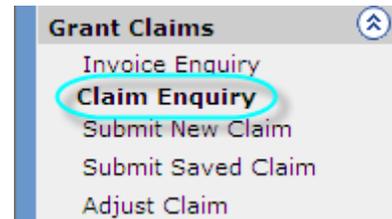
Submitted By

# How to find a Submitted Claim: Claim Enquiry = Tax invoice

Follow the steps below to find an existing claim.

You can find both submitted and saved claims using this procedure.

- | Step | Action   |
|------|--|
| 1    | Log into <i>Grants Online</i> .<br>The Grants Online <b>Home Page</b> displays.  |
| 2    | Select <b>Claim Enquiry</b> from the <b>Grant Claims</b> section on the tool bar.<br>The <b>Claim Tax Invoice Enquiry</b> page displaying <b>Criteria</b> and <b>Advanced Criteria</b> sections.   |
| 3    | Type in the search criteria you have on hand, for example, the <b>Claim ID</b> , or <b>Proforma Invoice ID</b> or <b>File ID</b> , into the corresponding field.<br>(Alternatively, you can use the <b>Pick List</b> function in the <b>Client ID</b> field to search on the client's name.) |
| 4    | Click the <b>Search</b> button in the top window button bar.<br>A list of claims matching your search criteria will display in the <b>Search Results</b> .   |
| 5    | Locate the claim you require in the <b>Search Results</b> .  |
| 6    | Click on the <b>Claim</b> number in the <b>Search Results</b> for the invoice you require. (This will display as a blue hyperlink in the <b>Claim</b> column.)   |



Claim Tax Invoice Enquiry

Hide Menu

**Criteria**

Claim ID

Proforma Invoice ID

File ID  Ext

Claim Date Between  and

Your Claim Reference

Client ID

**Advanced Criteria**

**Search Results**

Claim	Transaction Group ID	File/Ext	Proforma Invoice	Claimed Date	Inclusive Claimed Amount	Service Provider	Client	Status	Scope	Your Claim Ref	Type
<a href="#">1136064</a>	9136085	09F008844/1	9136423	27/03/2009	1133.00	TEST OFFICE 1	WONDERLAND, BETTY	CERTIFIED	UNITEMISED DISBURSEMENTS SUCH AS PHOTOCOPYING AND FAXES, COSTS OF THE SERVICES OF A TRANSLATOR FOR THE PURPOSES OF TRANSLATING A DOCUMENT, FAMILY COURT - REPRESENTATION FOLLOWING THE PRE-TRIAL CONFERENCE TO THE EVE OF TRIAL	BETTY12345	CLAIM

## How to find a Submitted Claim: Claim Enquiry = Tax invoice, continued

### Finding a claim, (continued)

Continue the steps below to find an existing claim.

- 7 The **Tax Invoice** page appears with details of the claim.

If you need to return to the original **Search Results** list, click the **Back to Search** button on the top button bar.

- 8 To close out of this window, do one of the following:
- Select another function from the tool bar
  - Log out of *Grants Online*.

### TAX INVOICE

[Back To Search](#)

[Hide Menu](#)

Service Provider TEST ORG 1  
Business Address 1 TEST RD DUNDAS NSW 2117  
ABN 54117567085  
Registered for GST YES  
Payment Method  
Date of Issue 27/03/2009  
Submitted Date 27/03/2009 17:19:38  
To LEGAL AID COMMISSION OF NSW

#### Claim Details

Claim ID 9136064  
Your Claim Reference BETTY12345  
Proforma Invoice ID 9136423  
File/Ext 09F008844/1  
Your File Reference  
Client Name BETTY WONDERLAND  
Practitioner TEST ONE

#### Work Performed

FEES AND DISBURSEMENTS as per schedule

Code	Work Type	Units Approved	Unit Type	GST Exclusive	GST	GST Inclusive	Reason
PD01	DISBURSEMENT GENERAL		FIXED	100.00	10.00	110.00	
PD10	TRANSLATION FEES		FIXED	150.00	15.00	165.00	
PF88	ALL WORK FOR SCOPE OF AID		LUMP SUM FEE	780.00	78.00	858.00	
	Total			1030.00	103.00	1133.00	

#### Certification

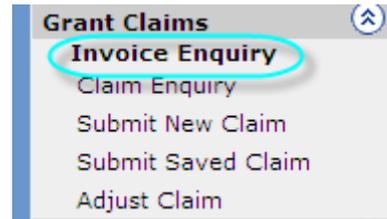
I, TEST ONE of TEST OFFICE 1

- Certify that this claim is correct and accurately reflects the services undertaken and disbursements incurred
- Acknowledge that this claim and the file are subject to audit by Legal Aid NSW.

# How to find a Proforma Invoice

Follow the steps below to find a Proforma Invoice

- | Step | Action   |
|------|--|
| 1    | Log into <i>Grants Online</i> .<br>The Grants Online <b>Home Page</b> displays.  |
| 2    | Select <b>Invoice Enquiry</b> from the <b>Grant Claims</b> section on the tool bar.<br>The <b>Search for a Proforma Invoice</b> page displaying <b>Criteria</b> and <b>Advanced Criteria</b> sections.   |
| 3    | Type in the search criteria you have on hand, for example, the <b>Claim ID</b> , or <b>Proforma Invoice ID</b> or <b>File ID</b> , into the corresponding field.<br>(Alternatively, you can use the <b>Pick List</b> function in the <b>Client ID</b> field to search on the client's name.) |
| 4    | Click the <b>Search</b> button in the top window button bar.<br>A list claims matching your search criteria will display in the <b>Search Results</b> .  |
| 5    | Locate the invoice you require in the <b>Search Results</b> .  |
| 6    | Click on the <b>Invoice</b> number in the <b>Search Results</b> for the invoice you require. (This will display as a blue hyperlink in the <b>Invoice</b> column.)   |



**Search for a Proforma Invoice**

Hide Menu

**Criteria**

Proforma Invoice ID

Your File Reference

Client ID

File ID  Ext

Office

**Advanced Criteria**

**Search Results**

Invoice	File / Ext	Your File Ref	Date of Grant	Primary File Matter	Service Provider Office	Client	Status	Scope
<a href="#">9136421</a>	09F008844/0		27/03/2009	SPEND TIME WITH	TEST OFFICE 1	WONDERLAND, BETTY	ACTIVE	UNITEMISED DISBURSEMENTS SUCH AS PHOTOCOPYING AND FAXES, INTERPRETER FEES, COMMERCIAL AGENT FEE FOR SERVICE OF DOCUMENTATION., EXPENDITURE OF CONDUCT MONEY IN THE COURSE OF ISSUING SUBPOENAE., FAMILY COURT - REPRESENTATION TO CONCLUSION OF PROCEDURAL HEARING
<a href="#">9136423</a>	09F008844/1		27/03/2009	SPEND TIME WITH	TEST OFFICE 1	WONDERLAND, BETTY	ACTIVE	UNITEMISED DISBURSEMENTS SUCH AS PHOTOCOPYING AND FAXES, COSTS OF THE SERVICES OF A TRANSLATOR FOR THE PURPOSES OF TRANSLATING A DOCUMENT, FAMILY COURT - REPRESENTATION FOLLOWING THE PRE-TRIAL CONFERENCE TO THE EVE OF TRIAL

## How to find a Proforma Invoice, continued

### Finding an invoice, (continued)

Continue the steps below to find a Proforma Invoice.

- 7 The **Proforma Invoice Enquiry** page appears with details of the invoice.

If you need to return to the original **Search Results** list, click the **Back to Search** button on the top button bar.

- 8 To close out of this window, do one of the following:
- Select another function from the tool bar
  - Log out of *Grants Online*.

Proforma Invoice Enquiry										
									<a href="#">Back To Search</a>	
Hide Menu										
Proforma Invoice ID	9136423									
File/Ext	09F008844/1									
Client	BETTY WONDERLAND									
Service Provider Office	TEST OFFICE 1									
Proforma Invoice Status	ACTIVE									
Business Address	1 TEST RD DUNDAS NSW 2117						Office ABN	54117567085		
							Registered for GST	YES		
<b>Proforma Invoice Detail</b>										
Grant of Aid				Claimed To Date			Rates as at 27/03/2009			
Code	Work Type	Amount available as at 27/03/2009	Partial Claim Available	Exclusive Amount	GST	Inclusive Amount	Exclusive Amount	GST	Inclusive Amount	
PD01	DISBURSEMENT GENERAL	FIXED \$100.00	YES	100.00	10.00	110.00	100.00	10.00	110.00	
PD10	TRANSLATION FEES	FIXED \$500.00	YES	150.00	15.00	165.00	500.00	50.00	550.00	
PF88	ALL WORK FOR SCOPE OF AID	LUMP SUM FEE \$780.00	YES	780.00	78.00	858.00	780.00	78.00	858.00	
				Total	1030.00	103.00	1133.00			

# Adjustments to Claims

## When you can adjust a claim

You can submit an adjustment to a claim when:

- The wrong amount has been paid
- You have received a duplicate payment.

### Note:

You will need to nominate the reason you are submitting the adjustment, from the options on the **Reason** drop-down list.

## Description

You can adjust claims using the **Adjust Claim** function on the tool bar.

You can view the details of your submitted claims and adjust individual claimed amounts at the work item level.

The amount may be adjusted either negatively or positively depending upon whether or not the claim has been previously certified by Legal Aid NSW. These rules are outlined in the table below.



Adjustments to claims can only be **submitted** – they cannot be **saved** for submission later on. Therefore, only start an adjustment if you know you will be able to submit it straight away.

### Before Certification by Legal Aid NSW

If your claim has not yet been certified by Legal Aid NSW, you can adjust the claimed amount either positively or negatively.

View the status of the claim in Claim Enquiry search.

Multiple positive or negative adjustments to a claim can be made until the claim is certified

#### Note:

However, you cannot claim for work items which were not on the original claim.

### After Certification by Legal Aid NSW

If the claim has been certified by Legal Aid NSW, only negative adjustments can be made once the claim has been certified.

You can make multiple negative adjustments to a claim until no more work items can be adjusted.

#### Note:

You cannot make positive adjustments to claimed amounts. Instead, you will need to submit a new claim via the **Submit New Claim** function, if there are claimable amounts left on the claim.

#### Credit notes:

Any negative adjustments made to the claimed amount will create a credit note transaction for a value of the difference between the certified claimed amount and the adjusted claimed amounts.

# How to Adjust a Claim

## How to Adjust a claim

Follow the steps below to submit an adjustment to a claim.

1. Log onto **Grants Online** and click on the **Adjust Claim** link under Grant Claims menu.
2. Find the Claim and click on the Claim Id. **Adjust Claim** window appears claim details
3. **Original Claim** details and **Adjust Claim** details appear in separate grids.
4. Enter the **New Adjustment** details: **Exclusive to be Adjusted** or **Inclusive to be Adjusted** amounts, select a **Reason** from the drop down list, and enter a **Comment** if required.
5. Click on the **Pick List** icon at the end of the **Certification** fields, and select the name of the practitioner who will certify this claim. The practitioner's First Name and Surname will display in the **Certification** fields.
6. Click the **Submit** button. A message appears that the adjustment was submitted successfully.
7. A **Credit Note** is auto created if the original claim was certified.

**Adjust a Claim**
Submit Back To Search

Hide Menu

Claim ID	9136054	Claim Status	CERTIFIED
Proforma Invoice ID	9136423		
File/Ext	09F008844/1		
Client Name	BETTY WONDERLAND		
Payee Service Provider Office	TEST OFFICE 1		
Business Address	1 TEST RD DUNDAS NSW 2117	Office ABN	54117567085
		Registered For GST	YES

**Claim Details**  
 Practitioner: TEST ONE  
 Your Claim Reference: BETTY12345  
 Final Claim for Grant File: NO  
 Final Claim for Proforma Invoice: NO  
 Comments:

**Original Claim 27/03/2009** - Invoice Enquiry

Grant of Aid		Rate(s)	Original Claim				
Code	Work Type	Effective Date Range	Units Claimed	Exclusive Amount Claimed	GST	Inclusive Amount Claimed	Service Period
PD01	DISBURSEMENT GENERAL	27/03/2009 to 27/03/2009		100.00	10.00	110.00	
PD10	TRANSLATION FEES	27/03/2009 to 27/03/2009		150.00	15.00	165.00	
PF88	ALL WORK FOR SCOPE OF AID	27/03/2009 to 27/03/2009		780.00	78.00	858.00	
<b>Total</b>				\$1030.00	\$103.00	\$1133.00	

**Adjust Claim**  
 Adjustment to previous claim for FEES AND DISBURSEMENTS as per schedule

Grant of Aid		Rates Available		New Adjustment					
Code	Work Type	Effective Date Range	Available Fee Information	Units to be Adjusted	Exclusive Amount to be Adjusted	GST	Inclusive Amount to be Adjusted	Reason	Comment
PD01	DISBURSEMENT GENERAL	27/03/2009 to 27/03/2009	FIXED \$100.00		100.00	10.00	110.00		
PD10	TRANSLATION FEES	27/03/2009 to 27/03/2009	FIXED \$150.00		0.00	0.00	0.00	INCORRECT AMOUNT PD	
PF88	ALL WORK FOR SCOPE OF AID	27/03/2009 to 27/03/2009	LUMP SUM FEE \$0.00		0.00	0.00	0.00		
<b>Total</b>					\$100.00	\$10.00	\$110.00		

**Certification**  
 TEST ONE TEST OFFICE 1