

Getting Started

Overview

Introduction This chapter introduces you to the Grants Online home page and the noticeboard, and how to log in.

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Logging in and out

How to log in

Follow the steps below to log in to *Grants Online*:

Step	Action
1	Click the Grants Online link on the Legal Aid NSW home page at www.legalaid.nsw.gov.au The Log In window displays.
2	Type in your User Name and Password (case sensitive) into the User Name and Password fields.
3	Click the Log In button (or press the Enter key on your keyboard). The Grants Online menu page will display.

If you need to register to use Grants Online then click the Register button located on the log in page.

Having problems logging into Grants Online then please check your log in details and contact the Grants Support Desk if you require a password reset.

Logging out

To log out, click the **Logout** link in the top left hand corner of the window.

Note:

You can log out regardless of what page you are in – you do not need to return to the Home Page to log out.

The screenshot shows the Legal Aid NSW Online website. The top navigation bar includes the Legal Aid NSW logo, a search bar, and a 'Skip to content' link. The main content area is titled 'Welcome to Legal Aid NSW Online' and provides information about the services available. Below this, there is an 'Info Centre' section with recent news items. The bottom section of the page features the 'Grants Online' login interface, which includes a celebratory banner for 30 years of service, a message about logging in, and a form with 'User Name*' and 'Password*' fields, a 'Log In' button, and a 'Cancel' button. Below the login form are links for 'Registration', 'FAQs', and 'User Guide'. A footer note provides contact information for the Grants Support Desk.

This screenshot shows a close-up of the user interface at the bottom of the page. It features the Legal Aid NSW logo and the text 'NEW SOUTH WALES'. Below this, there is a navigation bar with three items: 'Logout', 'Change Password', and 'Logged in as:'. The 'Logout' button is highlighted with a red circle.

Grants Online Homepage

Grants Online Homepage

When logging into Grants Online the first page appears with the Toolbar on the left and the Noticeboard as the main page.

The menu items under each heading in the toolbar will be explained in more detail in this manual.

There are two parts to the **Home** toolbar, the **Noticeboard** and the **Inbox** described later in this chapter.

The following chapters are also included in this manual.

Applications is divided into two chapters

- New Applications
- Other Application

Grants Management

Grant Claims

Client

Update your Details

Duty Lawyer

The screenshot shows the Grants Online homepage for legal practitioners. The page has a blue header with the Legal Aid NSW logo and the text "For Legal Practitioners". Below the header, there is a navigation bar with links for "Logout", "Change Password", and "Logged in as: test1". A contact number for the Grants Support Desk is also provided: "(02) 9219 5999".

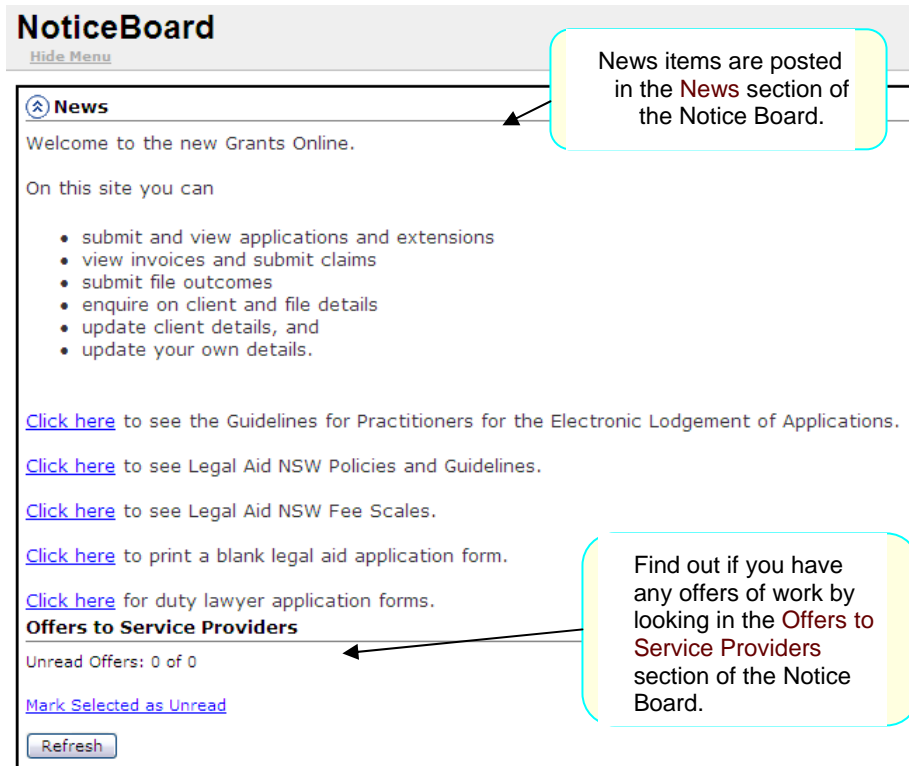
The main content area is divided into two sections:

- Grants Online**: A vertical toolbar on the left with expandable sections:
 - Home**: Noticeboard, Inbox
 - Applications**: View and Edit, New Application, Extension, Transfer, File Outcome, Review (LARC Appeal)
 - Grants Management**: File Enquiry, Means Test Results Enquiry, Submit Correspondence
 - Grant Claims**: Invoice Enquiry, Claim Enquiry, Submit New Claim, Submit Saved Claim, Adjust Claim
 - Client**: Client Details Enquiry, Update Client Details
 - Update Your Details**: Update Personal Details
 - Duty Lawyer**: View Claim Invoice, Submit Saved Claim, Submit New Claim, Adjust Claim
- NoticeBoard**: A main content area with a "News" section. It includes a welcome message, a list of actions users can perform on the site (submit and view applications, view invoices, submit file outcomes, enquire on client details, update client details), and several links to external resources like guidelines, policies, fee scales, and application forms. It also shows "Offers to Service Providers" with "Unread Offers: 0 of 0" and a "Refresh" button.

Noticeboard

Description The Noticeboard is where Legal Aid NSW will post notices about news items.
Offers of work will appear in the Noticeboard for those practitioners who are registered as members of a Legal Aid panel.

See the section on *Accepting Offers of Work*, later in this chapter for more information on Offers to Service Providers.



The screenshot shows the 'NoticeBoard' interface. At the top, there is a 'Hide Menu' link. Below that is a 'News' section with a sub-header 'Welcome to the new Grants Online.' and a list of actions: 'submit and view applications and extensions', 'view invoices and submit claims', 'submit file outcomes', 'enquire on client and file details', 'update client details, and', and 'update your own details.' There are several 'Click here' links for guidelines, policies, fee scales, and application forms. Below this is the 'Offers to Service Providers' section, which shows 'Unread Offers: 0 of 0' and a 'Mark Selected as Unread' link. A 'Refresh' button is at the bottom. Two callout boxes are present: one pointing to the 'News' section with the text 'News items are posted in the News section of the Notice Board.' and another pointing to the 'Offers to Service Providers' section with the text 'Find out if you have any offers of work by looking in the Offers to Service Providers section of the Notice Board.'



What is a Service Provider?

The term 'Service Provider' is used to refer to all types of legal practitioners. However, it also refers to any other type of practitioner who may be providing a service to a client (for example, medical practitioners providing medical reports). A Service Provider Person is attached to a Service Provider Office and Service Provider Organisation. An organisation can have one office or many office locations.

Accepting offers of work

Panel offers Other than in exceptional circumstances, Legal Aid NSW will assign work only to practitioners who are members of an appropriate panel.

In some cases Legal Aid NSW will offer a matter to a number of practitioners at the top of a panel list simultaneously. These offers will appear on a firm's Noticeboard in Grants Online, and the first practitioner to accept the offer will receive the assignment. A practitioner who accepts an offer of work in this way will then drop to the bottom of the panel list.

Accepting a panel offer Follow the steps to viewing and accepting offers of work.

- Log into *Grants Online*. The Grants Online **Home Page** displays.
 - The **Noticeboard** displays and the **Offers to Service Provider** are listed.
 - Click on an **Unread** or **Read** link.
 - The **Accept Offer of Work** page appears populated with the Offer Details, Client Details, Aliases of the client, Grants Details, Matters and Other Parties. See next page.
-

Status	Date Offered	Offer Expires	Client	Court Date	Primary Matter	Offered To
Unread	02/02/2007 13:10	03/02/2007 13:10	Smith, Joe	22/02/2007	Court Appearance	Doe, John
Unread	02/02/2007 12:49	03/02/2007 12:49	Smith, Cat	23/02/2007	Court Appearance	Mark Solicitors
Unread	02/02/2007 12:22	03/02/2007 12:22	Smith, Mark	25/02/2007	Court Appearance	Doe, John
Unread	02/02/2007 12:03	03/02/2007 12:03	Blogs, Bill	23/12/2006	Court Appearance	Doe, John
Unread	02/02/2007 11:32	03/02/2007 11:32	Clark, Joe	25/02/2007	Court Appearance	Doe, John
Read	02/02/2007 09:18	03/02/2007 09:18	Doe, Dennis	23/12/2006	Court Appearance	Doe, John

Refresh [Mark Selected as Unread](#) 12 >

Accepting offers of work

Steps continued to accepting offers of work.

Accepting a panel offer continued

- In the **Accept Offer of Work**, click on the **Pick List** icon next to the **Accepted By** practitioner fields at the top of the page.
- Find the practitioner – see *Using the Pick List function - How to select a person (practitioner)* towards the end of this chapter. Note: you must select the pick list icon in order to find and retrieve the practitioner name.
- The **Accept Offer of Work** page appears with the practitioner's first name and surname after retrieving from the **Pick List**.
- Click the **Accept Offer** button.
- A confirmation message appears **Offer has been successfully accepted**.

Note: If the offer has been accepted by another practitioner then the offer will not be accepted by you and the above confirmation message will not appear.

Accept Offer of Work Accept Offer

Hide Menu

Offer Details

Accepted by	TEST	ONE
Service Provider Office	TEST OFFICE 1	
Offered on	30/03/2009 16:45	
Offer Expires	30/03/2009 19:45	

Client Details

Client Name	CARMEN FALL
Gender	FEMALE
Date of Birth	04/07/1970

Aliases

[246] There are no Client Alias records.

Grant Details

File/Ext	09F007414/0
Type of Appearance	INTERIM HEARING
Court Date	25/05/2009
Court Location	ALBURY
Court Type	FEDERAL MAGISTRATES
Interpreter Required	NO
Language	

Matters

Matter

INDEPENDENT CHILDREN'S LAWYER *

* Primary Matter

Other Parties

Other Party/Institution Name

WELCH, ALISON

WELCH, PAUL

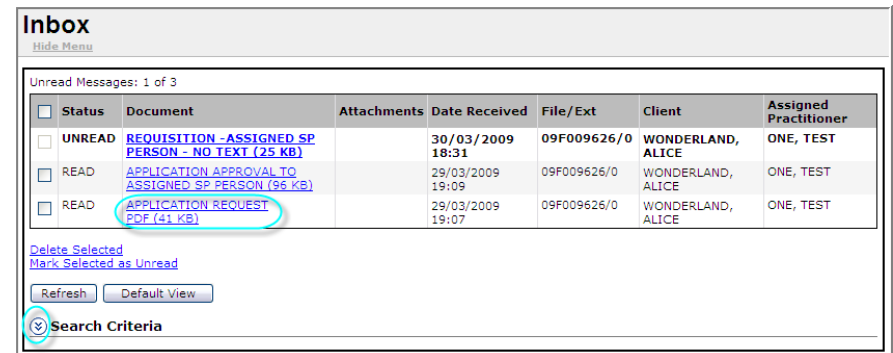
Managing your Inbox - Opening a Document

Description The Inbox operates like an email account between you and Legal Aid NSW. Note that this is an exclusive email account – no one else can send you emails to this inbox. Manage your Grants Online inbox as you manage other email account inboxes.

The Inbox also stores copies of any documents you have sent us (including applications for aid) for up to six months, as well as any correspondence we may have sent you in regard to these applications.

The Inbox operates like an email account between you and Legal Aid NSW. Note that this is an exclusive email account – no one else can send you emails to this inbox.

1. Log into Grants Online. The Grants Online **Home** page appears
2. Click on the **Inbox** in the left toolbar. The **Inbox** page appears
3. Click on a **Document** link in the document column.
4. If the document is a **Requisition** request then a new page will open. Refer to Requisition on the next page
5. A pop up message appears, if the document is a notification, **Do you want to open or save this file?** Select the **Open** or **Save** button.



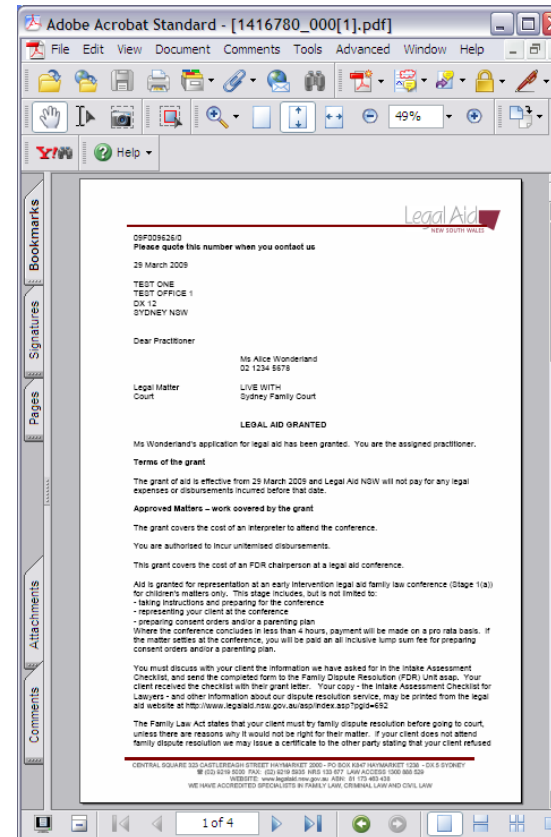
Note: Documents sent to your Inbox can include the following:-
Application Request form – submitted
Requisition – Respond to Requisition
Grant letters
Refusal letters
Termination letters
Transfer letters
Inactivity letters

Continued on Next Page

Managing your Inbox - Opening a Document

Steps to managing your Inbox continued.

6. If you clicked **Open** on the pop up message then a **PDF** will appear of the document selected.
If you clicked **Save** on the pop up message then you can save the document to your local network.
7. Click the red X at the top right of the **PDF** page and you will return to the Inbox page.



Continued on Next Page

Managing your Inbox - Responding to a Requisition

Steps to managing your Inbox continued.

1. Log into Grants Online. The Grants Online **Home** page appears
2. Click on the **Inbox** in the left toolbar. The **Inbox** page appears
3. When a **Requisition** document appears, click on the Requisition link in the Document column in the Inbox.
4. **Respond to Requisition** page appears with the File details, the Requisition details, Documents, Response area and Attachments.
5. Click on the **Requisition Documents - File/Note Attachment** link and a PDF of the Requisition will appear (upon clicking open or save on the pop up PDF message). Read the requisition.
6. Respond in the **Enter your response** field.
7. Click the **Add Note** or attach a document using the **Show File Upload** area. Refer to the Grants Management Chapter to add a note or attach a document.
8. Click **Save** button at the top of the **Respond to Requisition** page.

Status	Document	Attachments	Date Received	File/Ext	Client	Assigned Practitioner
UNREAD	REQUISITION - ASSIGNED SP PERSON - NO TEXT (25 KB)		30/03/2009 18:31	09F009626/0	WONDERLAND, ALICE	ONE, TEST
READ	APPLICATION APPROVAL TO ASSIGNED SP PERSON (96 KB)		29/03/2009 19:09	09F009626/0	WONDERLAND, ALICE	ONE, TEST
READ	APPLICATION REQUEST PDF (41 KB)		29/03/2009 19:07	09F009626/0	WONDERLAND, ALICE	ONE, TEST

Respond to Requisition Save

File ID: 09F009626 ALICE WONDERLAND
Extension: 0

Requisition Details

To: TEST ONE Sent: 30/03/2009
Status: AWAITING RESPONSE Response due on: 17/04/2009

Requisition Documents

File/Note Attachment	Comment
1416894_000.pdf	REQUISITION - ASSIGNED SP PERSON - NO TEXT

Response

Enter your response*
A copy of 3 months worth of bank statements are attached.

Attachments

Add Note Show File Upload Area

9. After clicking **Save**, a message will appear: *Your record was saved successfully*. Click on the **Inbox** menu link
10. The **Inbox** page appears with the Requisition document Status appearing as **Responded**.

Managing your Inbox – Searching, Marking as Unread, Deleting

Checkbox

You cannot check the checkbox next to Unread or Responded messages. You can only check the checkbox on Read messages. After opening a Document, click the **Refresh** button and the Status changes from Unread to Read. The check box for selection is then enabled.

Unread Messages: 1 of 3	
Status	Document
<input type="checkbox"/> RESPONDED	REQUISITION -ASSIG
<input type="checkbox"/> UNREAD	APPLICATION APPR
<input checked="" type="checkbox"/> READ	APPLICATION REQUE:

Delete Selected

- Click the **Checkboxes** to the Read or Responded Status documents to delete. Click the **Delete Selected** link. The selected items will delete.

Unread Messages: 1 of 3	
Status	Document
<input type="checkbox"/> RESPONDED	REQUISITION -AS:
<input type="checkbox"/> UNREAD	APPLICATION AP
<input type="checkbox"/> READ	APPLICATION REQ

[Delete Selected](#)
[Mark Selected as Unread](#)

Mark Selected as Unread

- Click the **Checkbox** to Read Status and click on the **Mark Selected as Unread** link to mark selected Read documents to Unread.

Refresh

- Click the **Refresh** button to refresh the documents.

Default View

- Click the **Default View** button and the Inbox reverts back to the default view.

Searching for a Document item

- Enter **Search Criteria** fields and click the **Refresh** button. The Inbox will display search criteria documents only.
- To return to the full inbox view, click on the **Default View**.

Refer to the end of this chapter on how to use the pick lists (the icons to right of Client Id, File Id and Service Provider Office)

Message Status

Document

Received Between And

Client ID

File

Service Provider Office

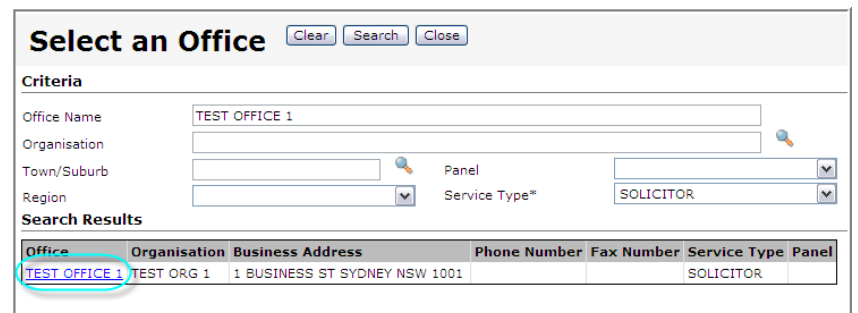
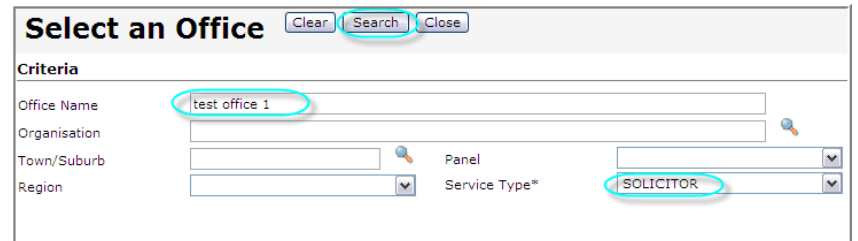
Using the Pick List function - How to select an office

Before you start

This procedure assumes that you have clicked on the **Pick List** icon in another page, and the **Select an Office** window has displayed.

Note: Every law firm is set up as an organisation and also has at least one office. A firm with multiple offices will be one organisation but have more than one office.

- | Step | Action |
|------|--|
| 1 | In the Select an Office window, select either Solicitor or Barrister from the Service Type drop-down list |
| 2 | Type your selection criteria into the relevant fields on the Select an Office window. The quickest options are: <ul style="list-style-type: none">• Type the name of the required office into the Office field.• Type the name of the required organisation into the Organisation field.• Or Click on the Pick List icon in the Organisation field, and then complete the Select an Organisation Pick List window.• Or Click on the Pick List icon in the Town/Suburb field, and then complete the Select a Suburb Pick List window. |
| 3 | Click the Search button in the top window button bar. A list of names matching your search criteria will display in the Search Results . |
| 4 | Click on the Office link in the Search Results . The name will be automatically inserted into the Office field on the previous page, and the Select an Office window will close. |



Office	Organisation	Business Address	Phone Number	Fax Number	Service Type	Panel
TEST OFFICE 1	TEST ORG 1	1 BUSINESS ST SYDNEY NSW 1001			SOLICITOR	

Using the Pick List function - How to select a person (practitioner)

Before you start

This procedure assumes that you have clicked on the **Pick List** icon in another page, and the **Select an Person** window has displayed.

Follow the steps below to select a practitioner (or other service provider) using the **Select a Person** Pick List window.

This procedure is most commonly used to select a practitioner name when you are certifying claims.

- | Step | Action |
|------|---|
| 1 | In the Select a Person window, the name of your office will automatically be inserted into the Office field. |
| 2 | Type your selection criteria into the relevant fields on the Select a Person window.
The quickest option is to type the first three letters of your (or the required practitioner's) First Name and Surname into the First Name and Surname fields. |
| 3 | Click the Search button in the top window button bar.
A list of names matching your search criteria will display in the Search Results . |
| 4 | Click on the required name in the Search Results . |

Note:

The practitioner may be in the list more than once if they are a member of more than one Service Provider Panel.

The name of the practitioner will be automatically inserted into the **Certification** field on the previous page, and the **Select a Person** window will close.

Certification
I, of TEST OFFICE 1

Select a Person

Criteria

Organisation

Office

First Name

Surname

Person Type

Panel

Prof Assoc Ref

Search Results

Person ID	Organisation	Office	Person Name	Panel	Prof Assoc Ref
1001146	TEST ORG 1	TEST OFFICE 1	ONE, TEST	CARE PANEL ADULT METROPOLITAN	
1001146	TEST ORG 1	TEST OFFICE 1	ONE, TEST	CARE PANEL CHILD METROPOLITAN	
1001146	TEST ORG 1	TEST OFFICE 1	ONE, TEST	FAMILY LAW PANEL	
1001146	TEST ORG 1	TEST OFFICE 1	ONE, TEST	ICL PANEL	

Certification
I, of TEST OFFICE 1

Using the Pick List function – How to select a client

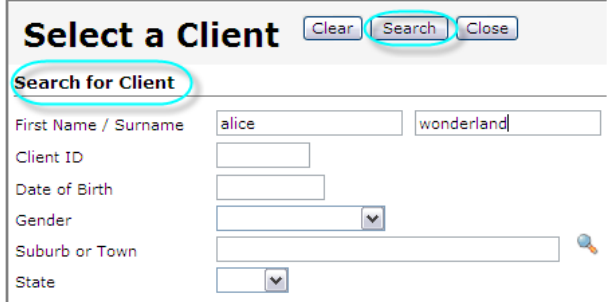
Before you start

This procedure assumes that you have clicked on the **Pick List** icon in another page, and the **Select a Client** window has displayed.

- | Step | Action |
|------|---|
| 1 | In the Select a Client window, type in your search criteria into the relevant fields. |
| 2 | Enter Search for Client fields. For example, enter the client's First Name and Surname into the First Name and Surname fields. |
| 3 | Click the Search button in the top window button bar.
A list of names matching your search criteria will display in the Search Results . |
| 4 | Click on the required name in the Search Results .
The client ID will be automatically inserted into the Client ID field on the previous page, and the Select a Client window will close. The screen |
| 5 | Depending on the page and function you are in, you may need to click the Search button in the top button bar, in order to retrieve a list of required items.
For example, you may need to click the Search button in order to retrieve a list of invoices or claims that relate to that particular client. |



Client (First Name / Surname) 



Select a Client


Search for Client

First Name / Surname


Client ID

Date of Birth

Gender

Suburb or Town 

State



Select a Client


Search for Client

First Name / Surname

Client ID

Date of Birth

Gender

Suburb or Town 

State

Search Results

Client Name	Date of Birth	Gender	Home Address
WONDERLAND, ALICE	30/08/1972	FEMALE	1 HACKS RD HACKS FERRY NSW 2441