



Portal user guide – Finalise a draft voucher application

An application for a voucher may be in draft if it is submitted with incorrect client information and then saved for later. The draft application can be completed later when you have the client's correct information.

Access

What access do I need?

SP Site

What else do I need?

The clients consent to share their information.

Finalising a draft application

Before finalising a draft application, a relationship with the client must be established by linking the client to your site.

Step 1

To link a client to your site, click the **Client** tab, and enter the four points of identification – eligibility/voucher number, given name, family name and date of birth.

Click **Find**.

The screenshot shows a web interface for finding a client or applicant. At the top, there is a green header with a dropdown arrow and the word 'Client'. Below this, there are two buttons: 'Apply for Program' and 'Retr'. The main heading is 'Find a client or applicant'. Below the heading, there is a note: 'To initiate a transfer or link a new client, the first four fields are mandatory.' The form contains five input fields: 'Eligibility Number/ Voucher Number' (with a placeholder 'Voucher number, Centrelink, DVA, ADF, JSID n'), 'Given Name', 'Family Name', 'Date of Birth' (with dropdown menus for Day, Month, and Year), and 'Site ID' (with a placeholder 'This is the site id number'). At the bottom of the form, there are two buttons: 'Find' and 'Clear'.

Step 2

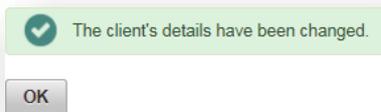
Select the Site ID you wish to transfer the client to and the Reason for Transfer from the dropdown.

Tick the box to confirm the client has provided consent and this has been documented on the client file.

The screenshot shows a confirmation dialog box. It contains a checkbox that is currently unchecked. Below the checkbox, there are two lines of text: 'I confirm I have the client's consent and authorisation to view and manage their details for the purpose of administering the Hearing Services Program.' and 'I confirm that the client or their power of attorney has authorised me to request a transfer from their existing Service Provider for the reason detailed above.' At the bottom of the dialog box, there are two buttons: 'Confirm' and 'Cancel'.

Step 3

Click **Confirm**, the client is now linked to your business. You will receive a message confirming the client's details have been changed. Select **OK**.

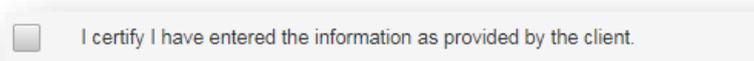


Step 4

Open the client's draft application by clicking on the Client tab and entering their four points of identification in the Find a client or application fields and click the **Find** button.

Step 5

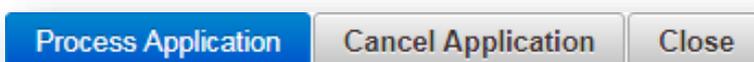
Review the statements and tick the box to indicate certification.



Step 6

Click the **Process Application** button to finalise the application.

The client's eligibility will be confirmed at this stage and if eligible, they will be issued with a voucher.



Click the **Cancel Application** button if you do not wish to proceed.