USER GUIDE

Tuesday, 28 June 2016

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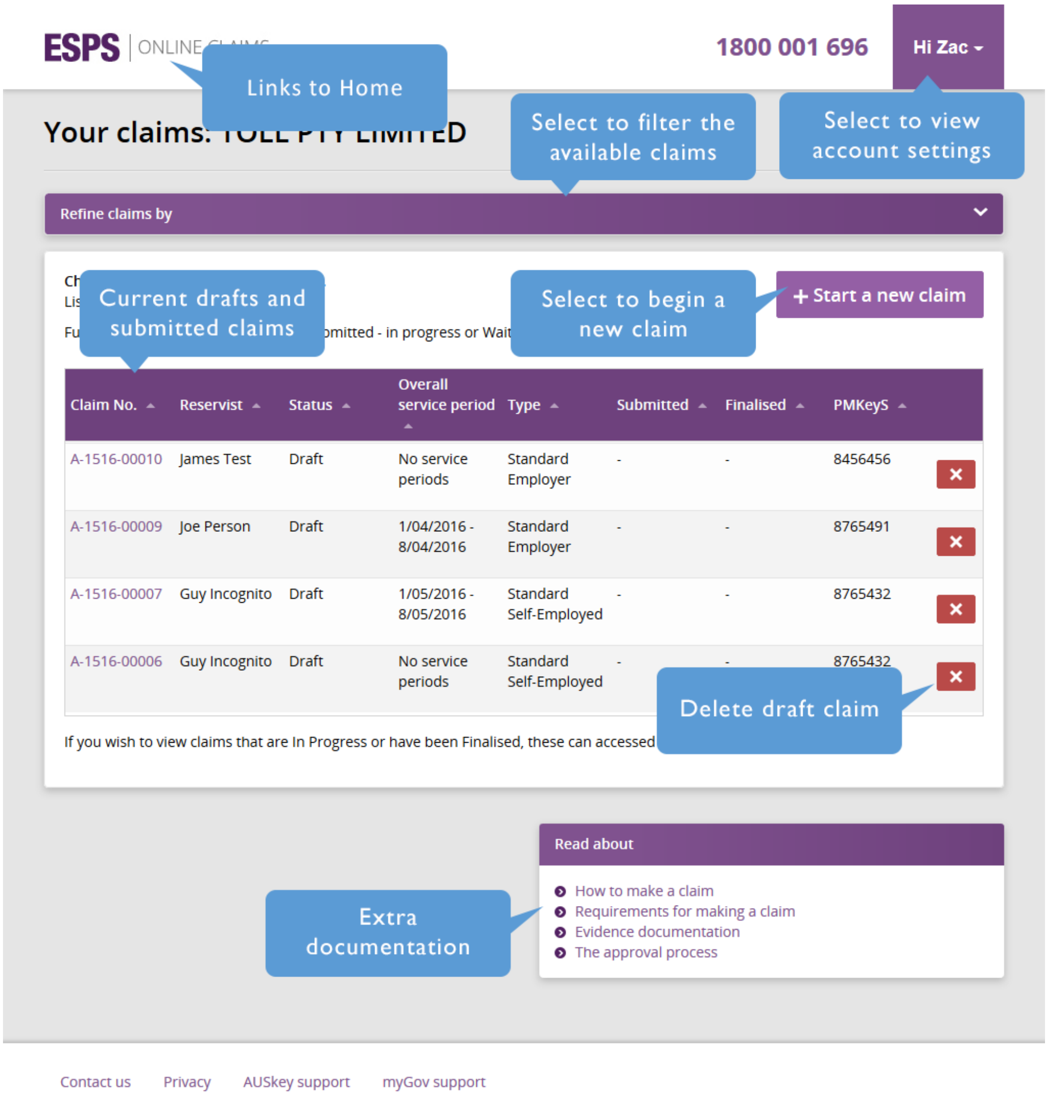
ABOUT THIS DOCUMENT

This document contains instructions for using the Employer Support Payment System (ESPS) Online Claims website.

NOTE: This application is only accessible via desktop, and hasn't been reviewed on mobile or tablet devices. AUSkey integration is only available for Firefox and IE browsers. Chrome and Edge users are only able to log in using myGov credentials.

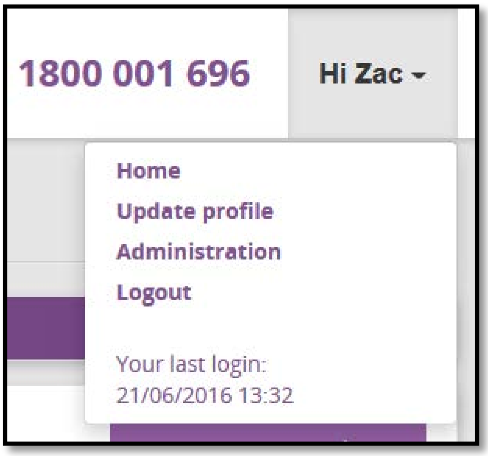
HOMEPAGE

The ESPS Online Claims homepage will display a list of claims. The homepage's buttons and sections are explained below.



- Clicking the ESPS logo in the top-left corner will return you to this homepage. This applies to all pages.
- Account Settings can be accessed on the homepage by selecting the '***Hi <name>***' button on the header bar.
- Claims can be filtered by clicking the ***Refine claims by*** expandable section.
- Additional documentation is available in the ***Read About*** section.

ACCOUNT SETTINGS



Click the username on the top-right of the screen to access the Account Settings menu.

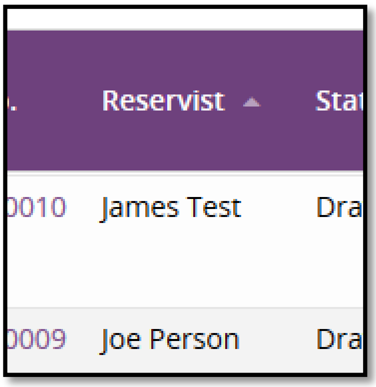
Selecting ***Update profile*** will allow the user to update their phone number and views their profile information.

For users that have administrative access, selecting ***Administration*** will allow the user to manage trading names, business units, claimants and user profiles.

Selecting ***Logout*** will log the user out of the system.

CLAIMS LISTING

Claim No.	Reservist	Status	Overall service period	Type	Submitted	Finalised	PMKeyS	
F-1516-00012	Peter Test	Submitted - in progress	1/02/2016 - 7/02/2016	Standard Self-Employed	17/05/2016	-	8456452	
A-1516-00010	James Test	Draft	No service periods	Standard Employer	-	-	8456456	×

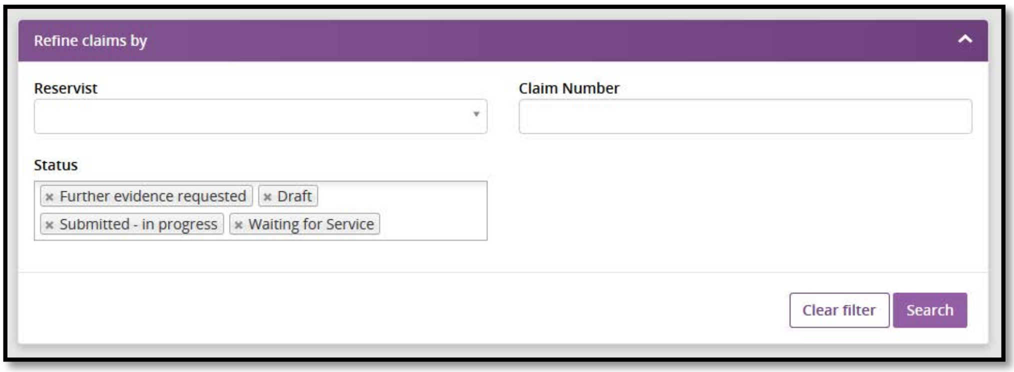


The homepage will display a list of claims. By default, this list is ordered by most recently updated. If a triangle icon appears next to the column header (see right), the table can be sorted by this column. Click the column header to cycle through the sorting options (ascending, descending, and disabled).

Draft claims are displayed with a red ***'X'*** button. To delete a claim, click this button, and then click ***OK*** on the confirmation popup.

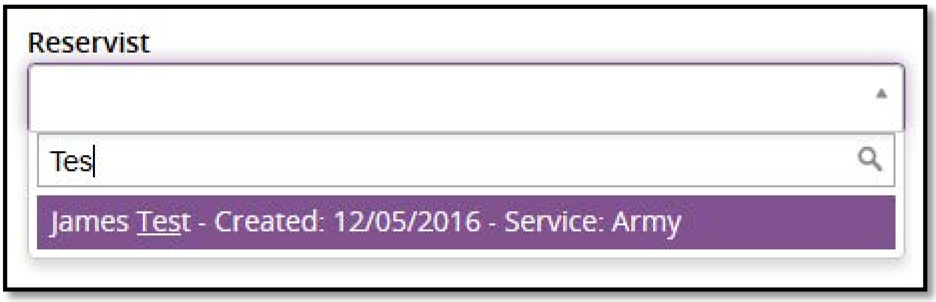
REFINE CLAIMS BY

The ***Refine claims by*** section allows users to filter the available claims by the reservist, claim number or the status of the claim.



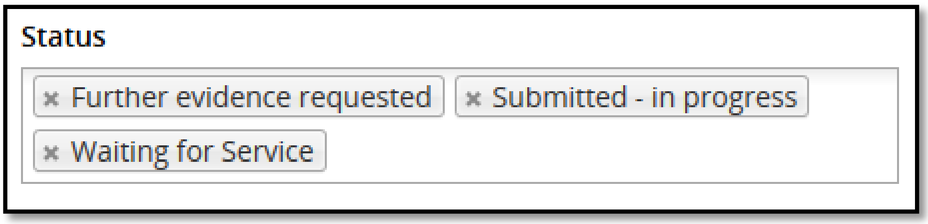
To filter by claim number, type in the complete claim number and click ***Search***.

To filter by reservist, begin typing the first or last name of the reservist. After two characters are typed, an autocomplete list will be displayed. Select a reservist and click ***Search***.

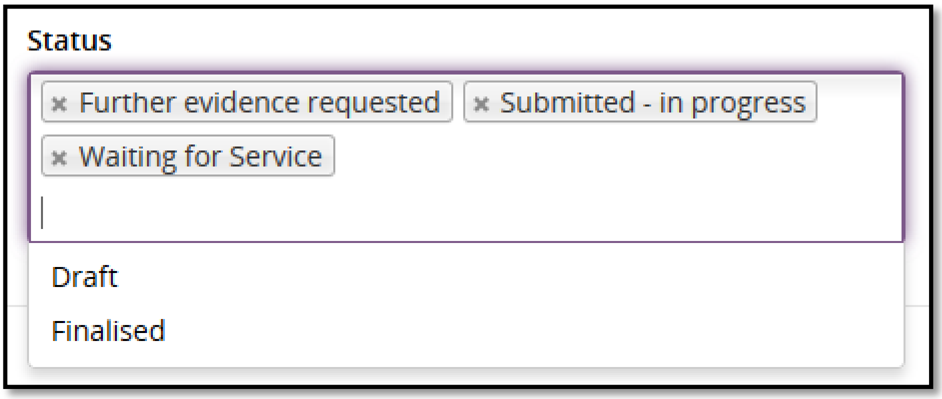


Claims can be filtered by the status of the claim: *Draft, Further evidence requested, Submitted – in progress, Waiting for service*, or *Finalized*.

To hide claims of a certain status, select the cross next to the option, and then click ***Search***.



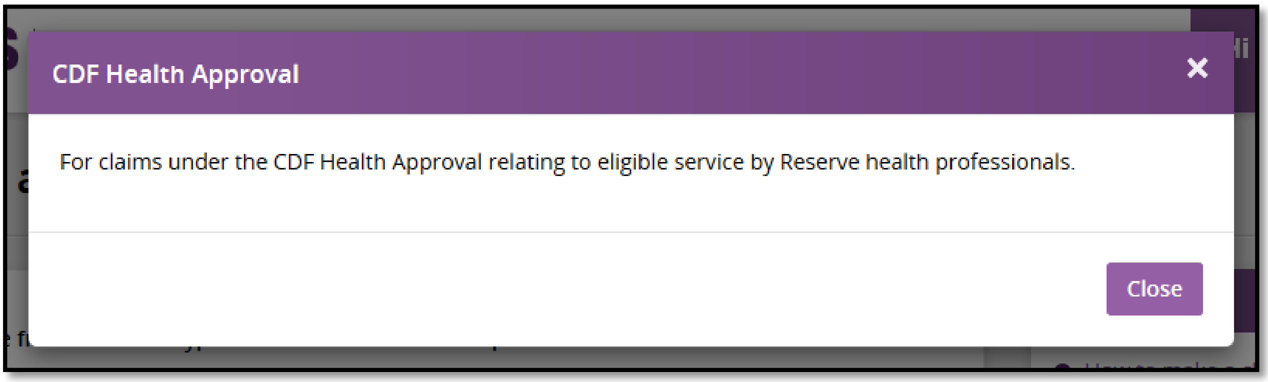
To show claims of a certain status, click inside the field. A dropdown list will appear, showing the available status options.



Select ***Search*** to confirm filter choices, or ***Clear filter*** to revert the settings back to default.

MORE INFORMATION

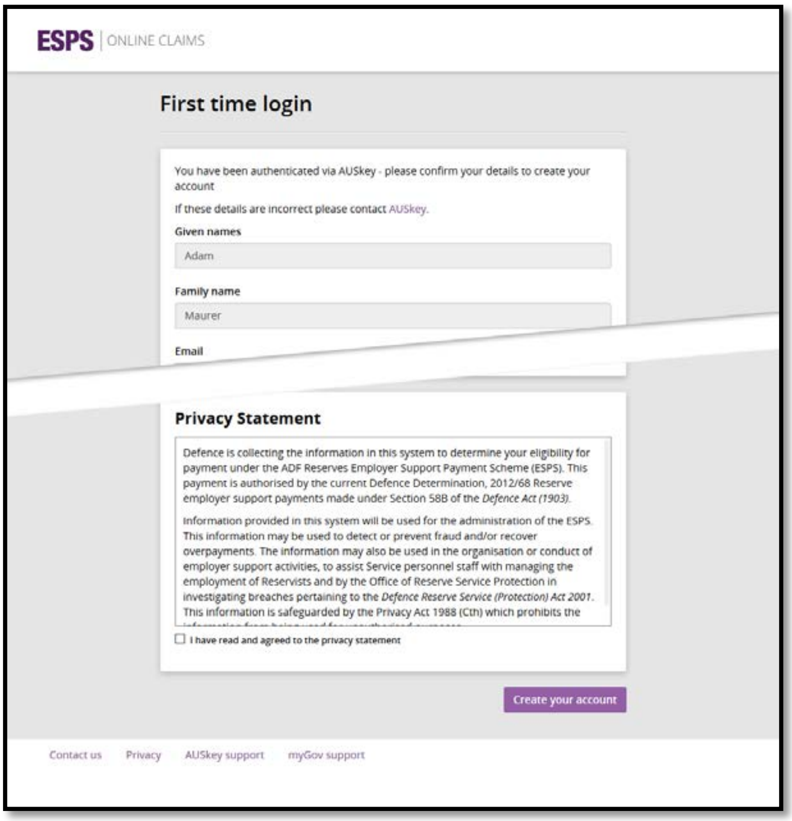
Throughout ESPS, additional information on a topic can be accessed where a blue 'i' icon is present. Selecting the icon will display the information in a message window.



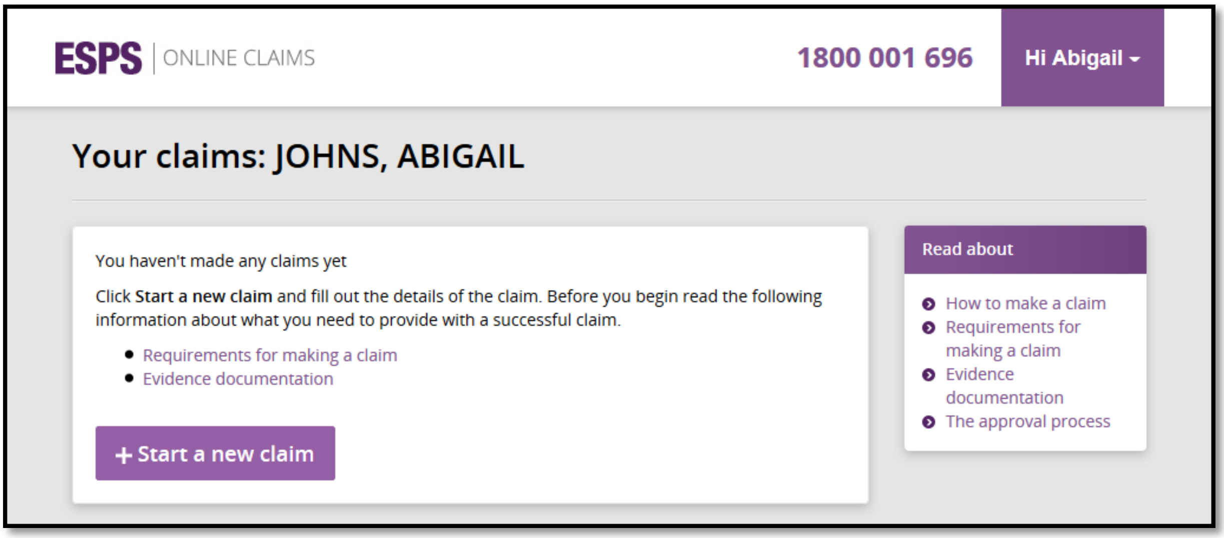
To close this message, select the cross in the top right corner, select ***Close***, or click anywhere outside the box.

FIRST TIME LOGIN

After authenticating via AUSKey or myGov, confirm that the basic information is correct and provide a phone number. The user must agree to the privacy statement to create an account.

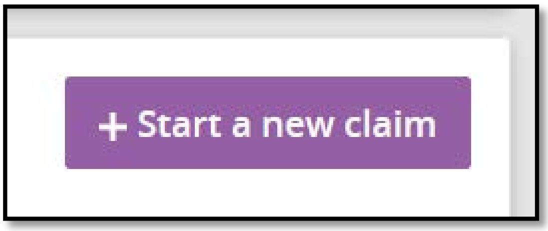


After creating an account, an introductory page will be displayed, directing the user to start a new claim, or view additional reading.



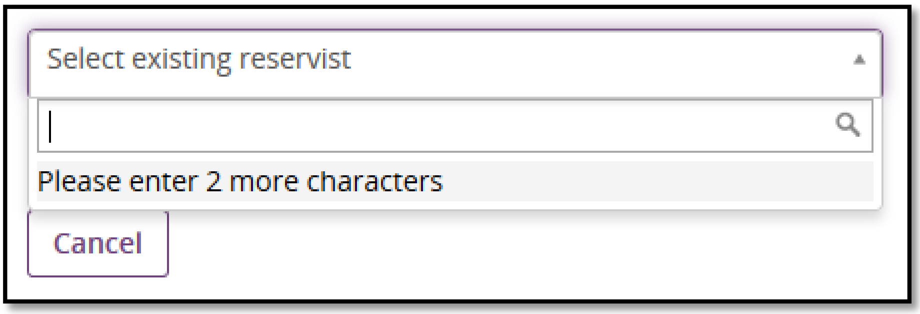
STARTING A NEW CLAIM

To start a new claim, select the ***+ Start a new claim*** button above the claims listing on the homepage.

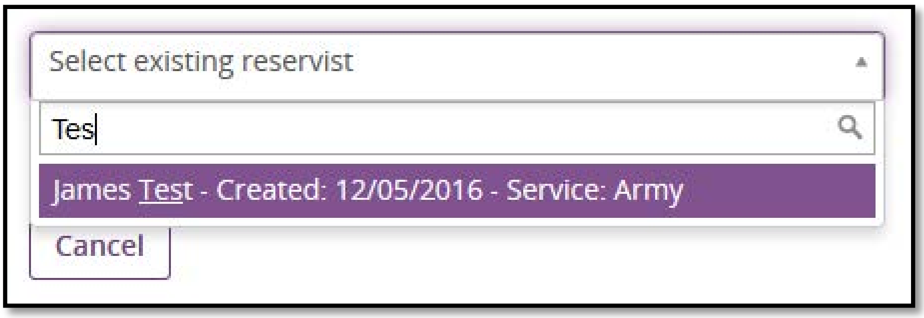


1. If starting a claim with a new reservist, click the ***or Start with new reservist*** button. If staring a claim using an existing reservist, click inside the ***Select existing reservist*** dropdown.

2. Enter two characters of the reservist's first or last name.

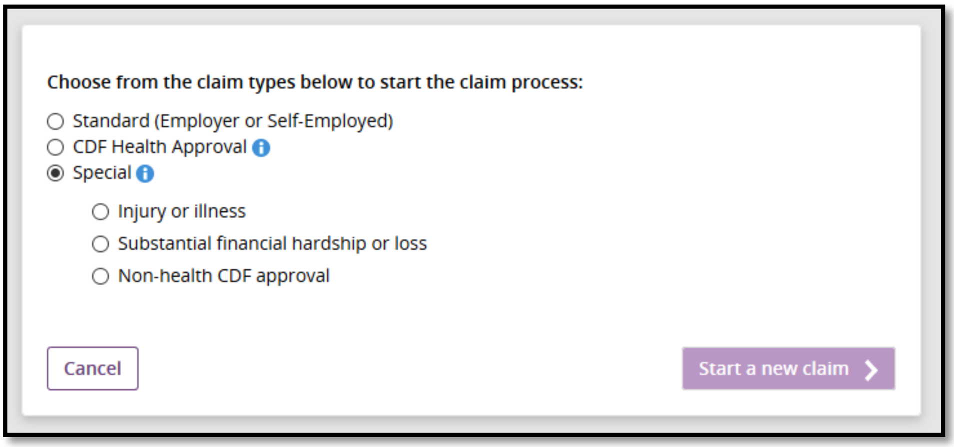


3. After two characters are typed, an autocomplete list will be displayed. Select a reservist.



4. Select ***Start*** to begin the claim.

5. Choose a claim type. Selecting *Special* will enable three more options. Select ***Start a new claim*** to begin.



STEP 1 - RESERVIST INFORMATION

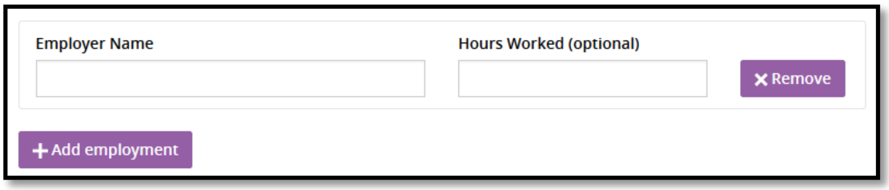
The Reservist step collects the reservist's information and the details of their employment. All fields are required unless otherwise stated. If the reservist has had claims processed before, a number of the fields will be filled out automatically. If an error is found, information will be displayed at the top of the page and next to the specific field.

Selecting certain responses will enable additional questions on the page. This includes, but is not limited to:

1. ***"Is Employee/Reservist employed in the Organisation on a full-time basis?"***

   Selecting "No" will enable the *Other employment information* section at the bottom of the page. This section allows you to add other employment information.

   Selecting ***+ Add employment*** will add an Employer field. Enter the employer name and the hours worked. To remove the added employment information, click the ***X Remove*** button.

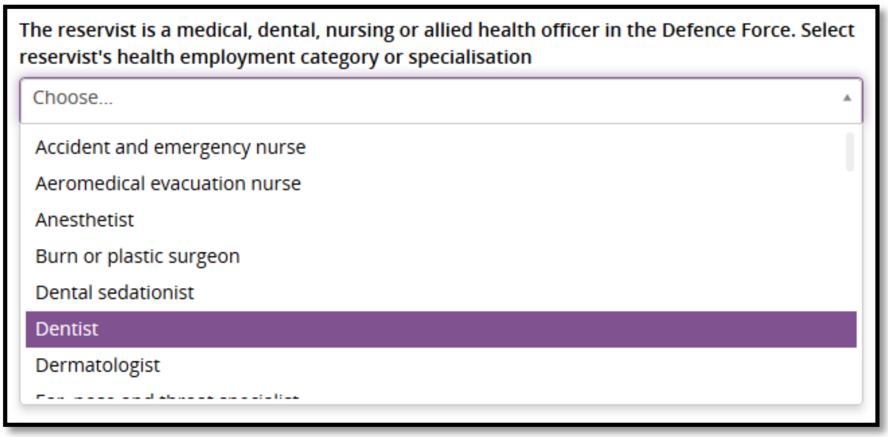


2. ***"Does the reservist have a controlling interest or ownership of the business?"***

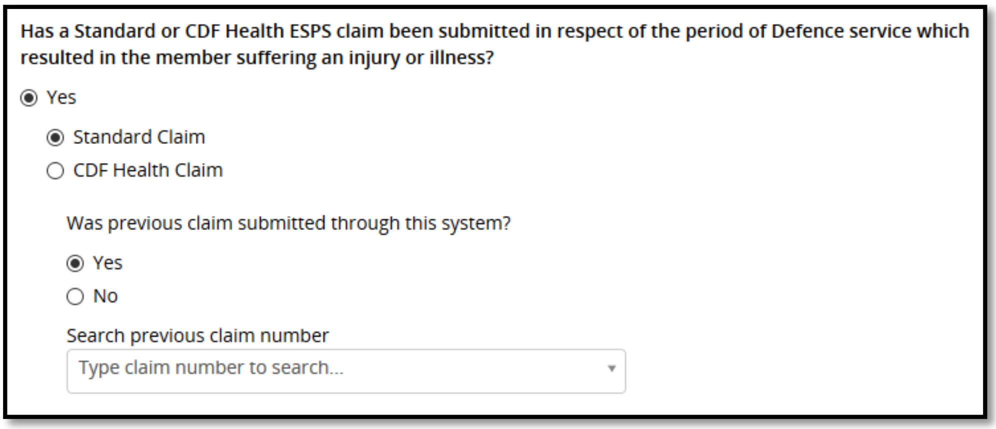
   Selecting *"The Reservist is a director of the company"* or *"The Reservist is an employee of, and has a controlling interest …in the company"* will prompt additional questions, depending on the type of claim.
   Selecting *"The Reservist is an employee of the company but does not have a controlling interest in the company"* will also prompt additional questions.

Some questions may only appear dependent on the type of claim. This includes, but is not limited to:

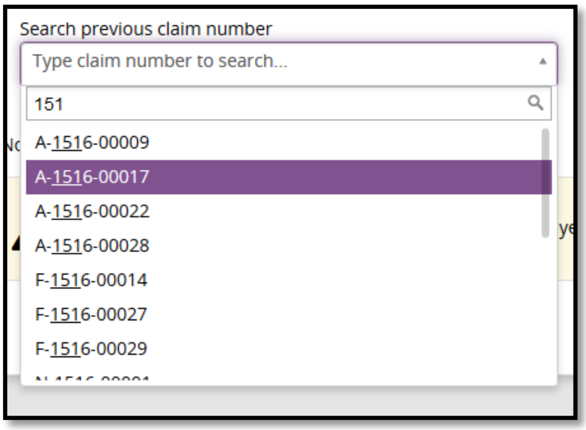
1. If the type of claim is *CDF Health Approval*, the user will be prompted to provide their health employment category or specialization.



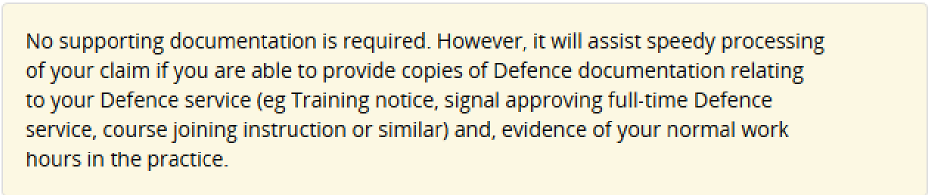
2. If the type of claim is *Injury or illness*, the user will be asked if a previous claim was made for the period of service that resulted in the injury or illness. If “*Yes*” is selected, additional questions will appear.

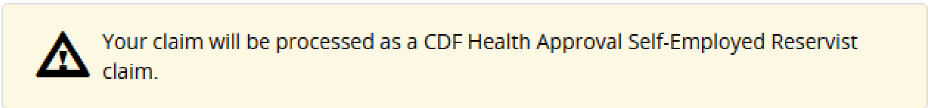


Was previous claim submitted through this system?
If “*Yes*” is selected, a search box will appear. Click in the box labelled *“Type claim number to search”*. After entering three characters, an autocomplete list will appear. Select the correct claim number.



When all the questions have been completed, a message at the bottom will provide additional information about the claim, including how the claim will be processed.



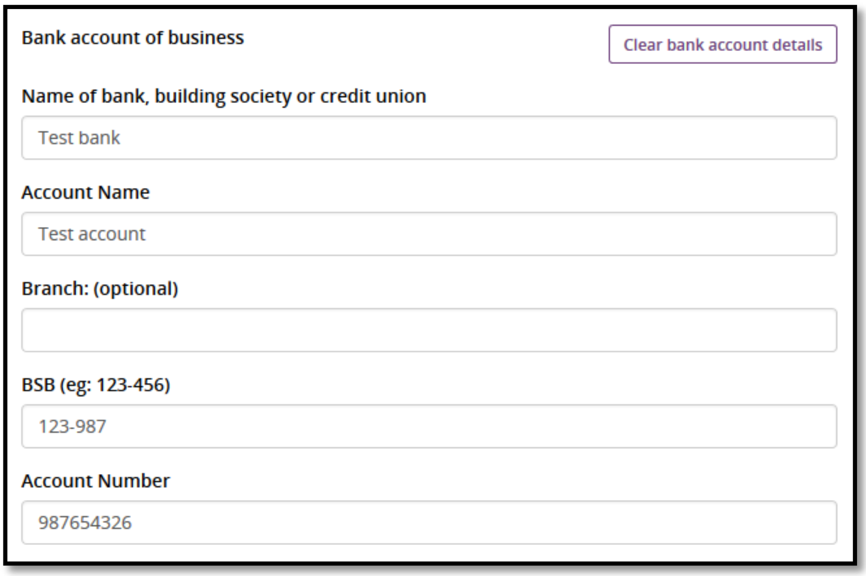


Click ***Continue to Business Details >*** to progress to the next page.

STEP 2 - BUSINESS DETAILS

The Business Details step collects information about the business, as well as contact details and bank details. All fields are required unless otherwise stated. If an error is found, information will be displayed at the top of the page and next to the specific field.

On this page, the user is required to provide contact information and banking details. For these sections, a button is available to clear the contents of the fields. Select ***Clear bank account details*** to clear the associated fields.

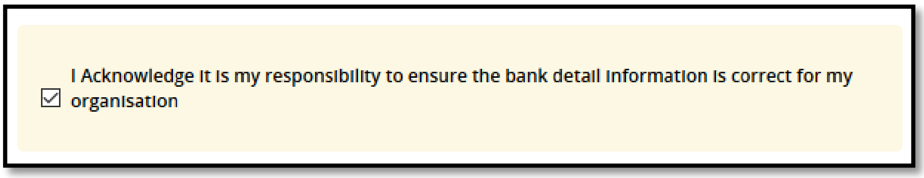


Selecting certain responses will enable additional questions on the page. This includes, but is not limited to:

1. ***"Mailing Address of Contact is not the same as business address"***

   Checking this box will provide more fields to enter a mailing address for the business.

2. ***"I Acknowledge it is my responsibility to ensure the bank detail information is correct for my organization"***

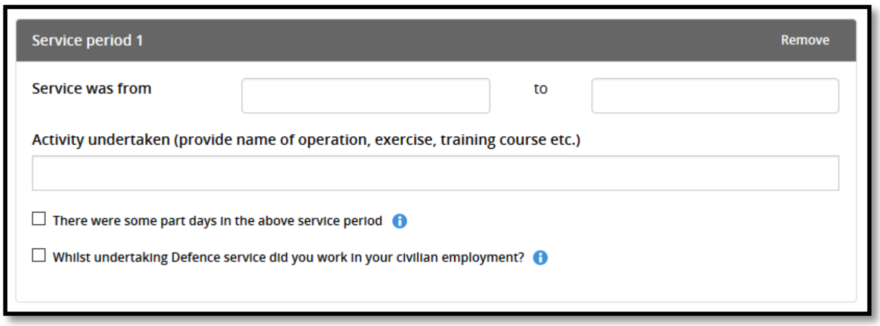


   This checkbox must be checked to continue to the next section.

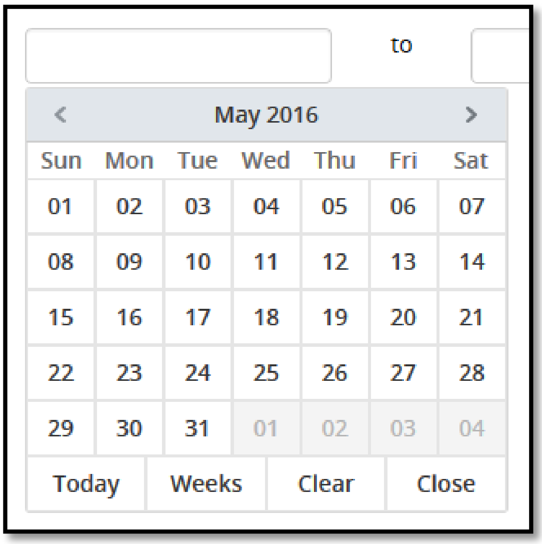
When all the questions have been filled out correctly, click ***Continue to Period of Service >*** to progress to the next page.

STEP 3 - PERIODS OF SERVICE

This step collects information about the reservist's period of service. Fill in all the required fields with information about the reservist. All fields are required, unless otherwise marked. If an error is found, information will be displayed at the top and next to the specific field.



To select a date, click inside the field to display a calendar.



To cycle through the months, use the left and right arrows in the top row. Click on the month/year in the top row to display months instead of days.

To display the week number, select the Weeks button.

Some questions may only appear dependent on the type of claim. This includes, but is not limited to:

1. If the claim type is *CDF Health Approval*, an additional question about the health service activity will be displayed.
2. If the claim type is *Injury or illness*, and a previous claim has already been submitted for the period of service resulting in the injury or illness, no information will be collected in this step.

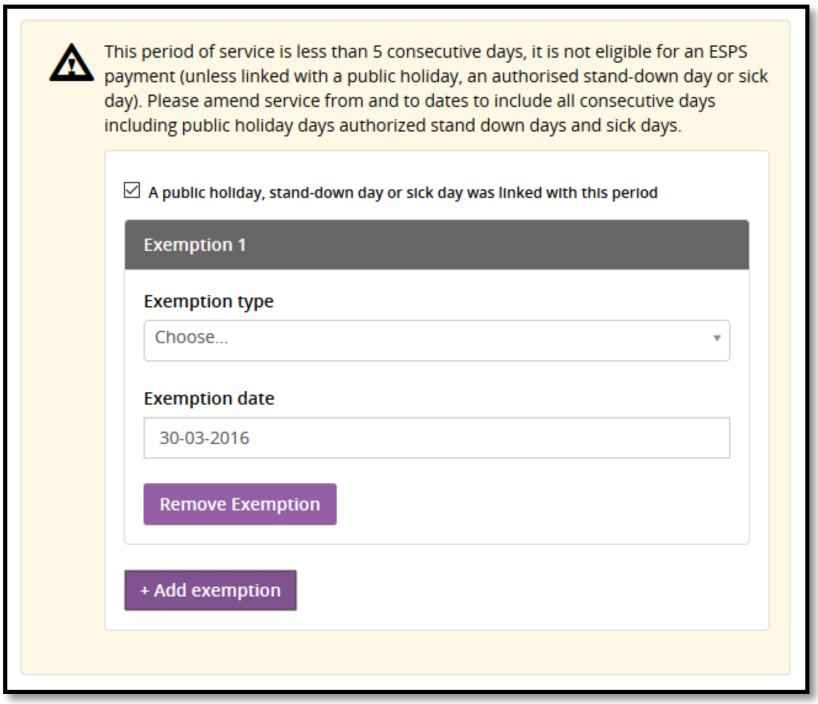
Selecting certain responses will enable additional questions on the page. This includes, but is not limited to:

1. If the service date started more than six months ago, the user will be required to provide a justification for late submission.

2. If the service date started more than twelve months ago, a warning message will explain that this claim cannot continue any further.

3. If the period of services is less than five consecutive days, the claim can only proceed with an exemption such as a public holiday, an authorised stand-down day or sick day. Once the start and end dates have been entered, a warning will appear.

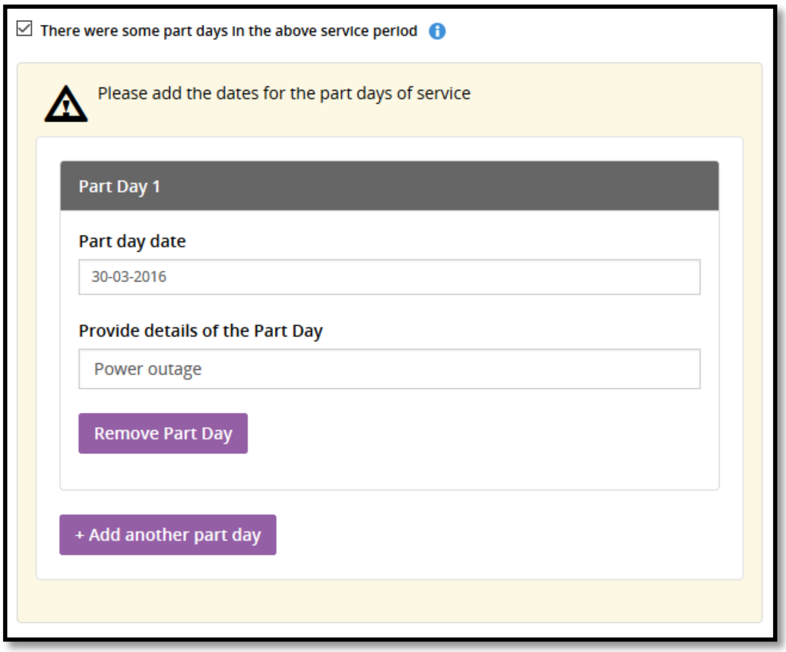
    a. Click ***+ Add exemption***.



    b. Select the exemption type from the dropdown and insert the date. Only dates in the service period will be accepted. Another exemption can be added by clicking ***+ Add exemption*** again.

4. *“There were some part days in the above service period”*

a. If this box is checked the ***+ Add a part day*** button becomes available. By selecting this button, details of the part day can be added.



b. Selecting ***Remove Part day*** will remove the part day from the list.

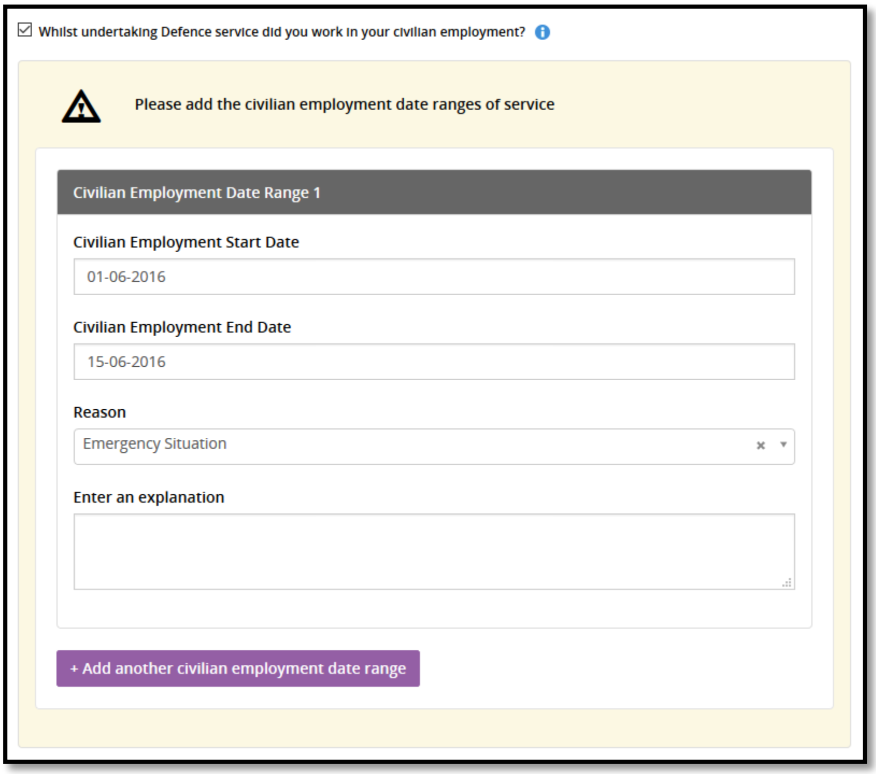
c. More than one part day can be entered by selecting ***+ Add another part day*** again.

5. *“Date(s) worked in Civilian Employment?”*

a. If this box is checked the option to add the civilian employment date ranges of service becomes availabe. Fill in the fields.

b. To add another date range select ***+ Add another civilian employment date range***. This will trigger another date range field to become available.

c. To remove a date range, select ***Remove Civilian Employment Date Range.***



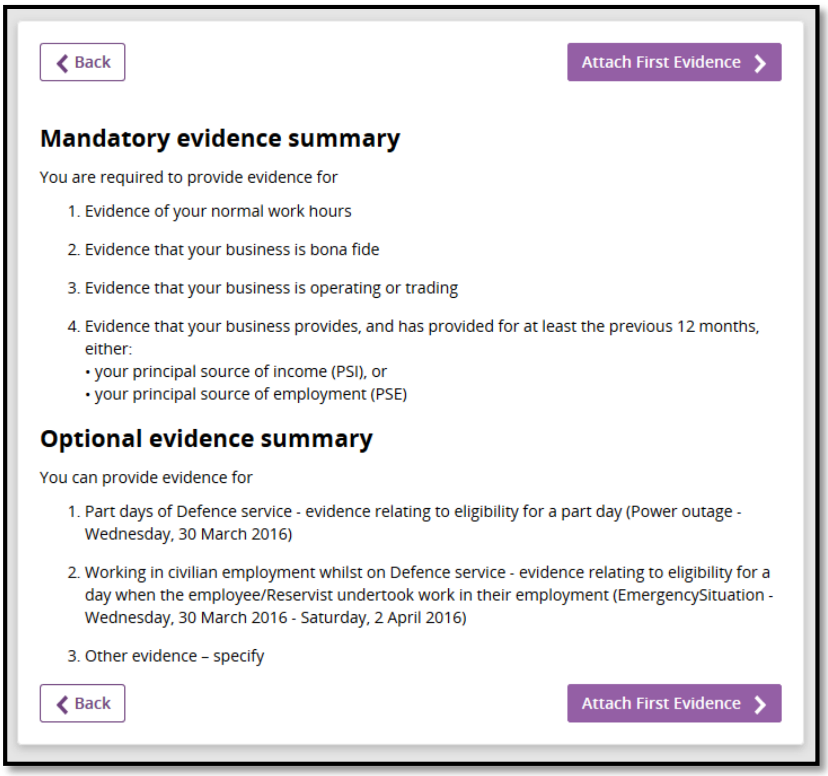
6. *“+ Add another service period”*

a. If this button is selected, another service period will be available to fill in.

b. To remove an extra service period select the remove button in the top right corner of the chosen period.

STEP 4 - ATTACH EVIDENCE

The fourth step will state what evidence needs to be provided to support the claim. Each claim will have mandatory section and an optional section for other supporting documents. As part of this step, the user will be able to upload files, and attach them as evidence to fulfil the evidence requirements.



The first page will display a list of required evidence. After reading these requirements, select ***Attach First Evidence*** to start submitting evidence.

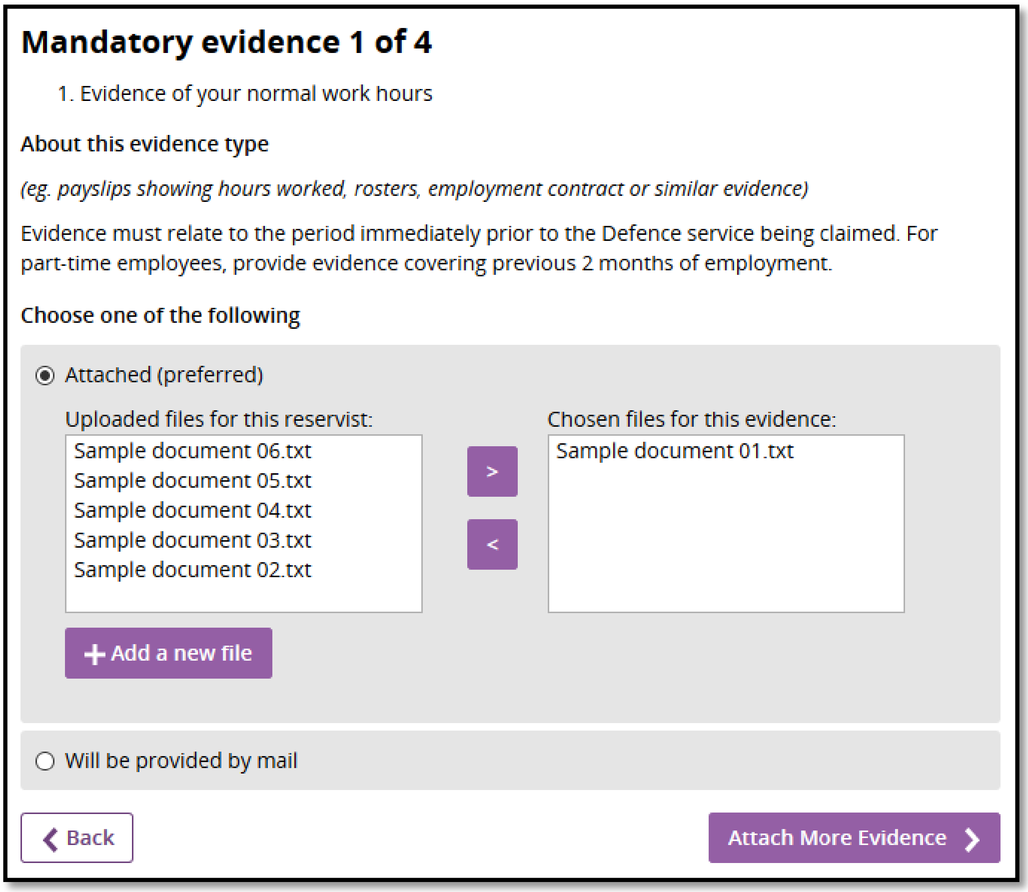
Some claims will not require any mandatory evidence. To skip this step, select the ***Continue to Evidence Completion >*** button. To attach optional evidence, select ***Attach Optional Evidence >***.

All mandatory evidence can be provided in two different ways:

- uploading files and adding them to the claim, or
- providing them by mail.

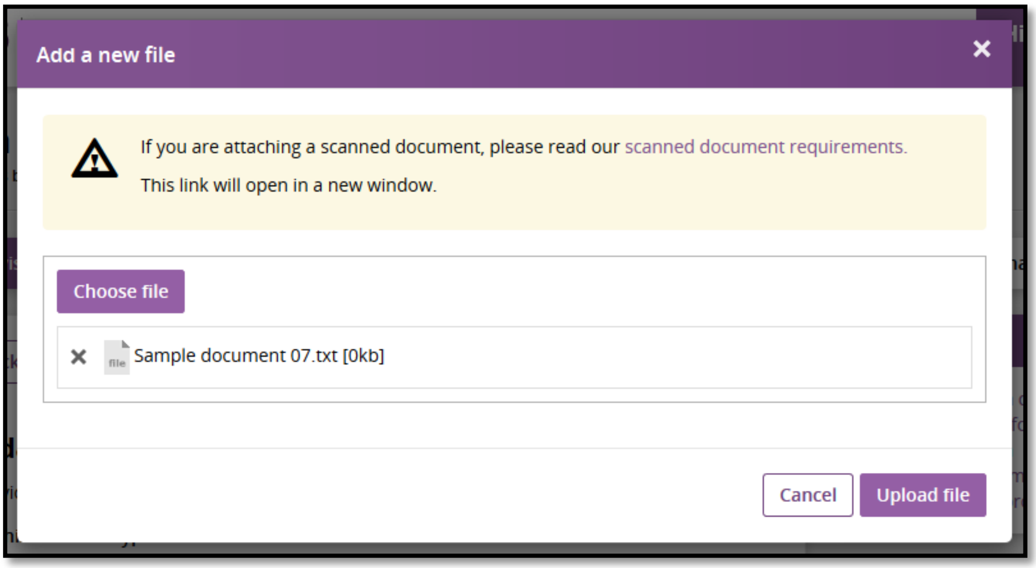
All uploaded files must meet the following requirements:

- Files must be less than 5mb in size.
- Supported file types are pdf, doc, xls, rtf, txt, jpg, bmp, gif, tiff, png.

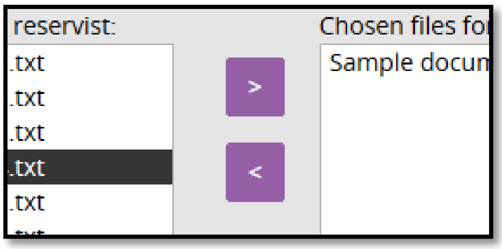


HOW TO ATTACH EVIDENCE

1. Select ***+ Add a new file*** in the Attached (preferred) section. A window will appear.
2. Select ***Choose file*** and navigate on your computer to the file to be uploaded. Select ***Upload file*** to continue with selection or choose a different file. Repeat as necessary.



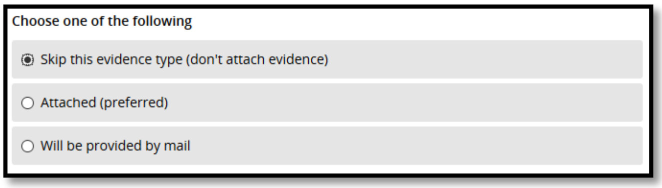
3. To submit an uploaded file as evidence, select a file and click the right arrow button. The selected file will move to the right column. To remove, use the left arrow button. Repeat as necessary.



4. Click ***Attach More Evidence >*** to progress to the next evidence type.

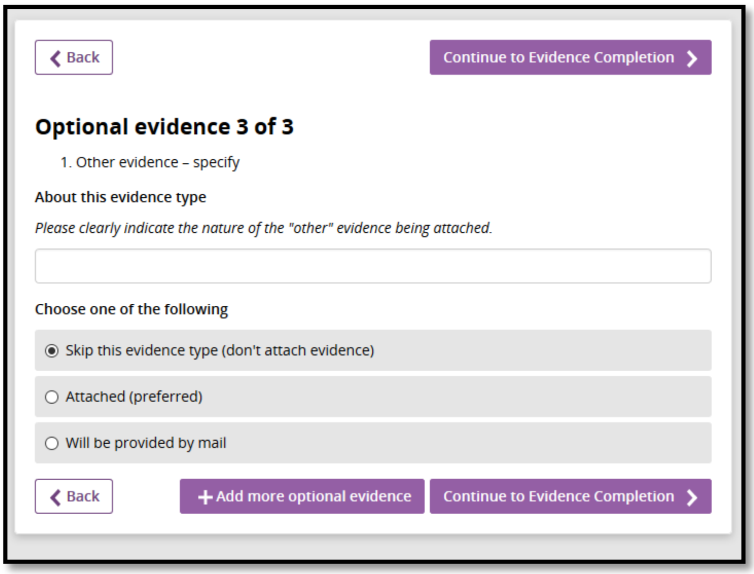
Once all the mandatory evidence pages have been completed, the user is given the option to submit optional evidence, or to progress to the evidence completion stage.

For optional evidence types, the user can select "*Skip this evidence type (don't attach evidence)*" to skip to the next evidence type.

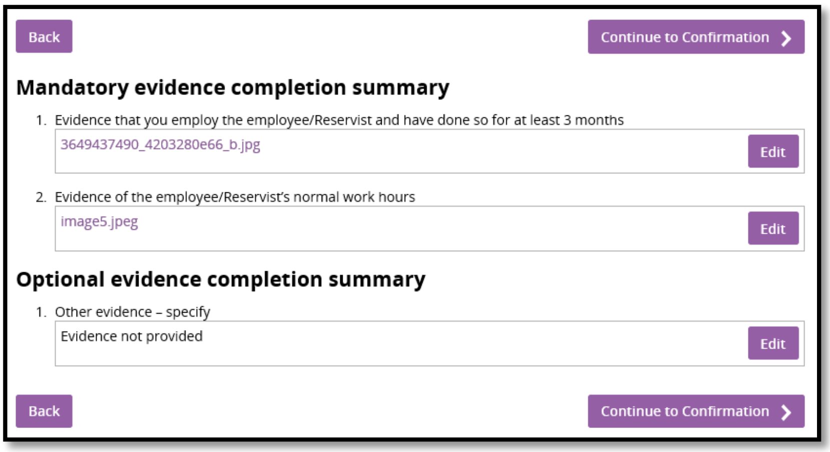


On the final optional evidence page (titled 'Other evidence – specify'), the user can submit evidence that hasn't been specifically requested. It is necessary to describe the type of evidence in the textbox provided.

If other types of evidence need to be attached, this process can be repeated by clicking ***+ Add more optional evidence***. Otherwise, click ***Continue to Evidence Completion >***.



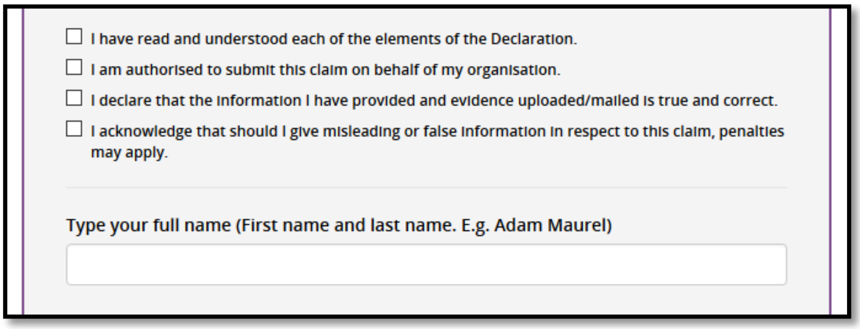
On the evidence completion page, a list of all the attached evidence is displayed. To change the supplied evidence, select the ***Edit*** button.



After checking all the evidence is correct, click ***Continue to Confirmation >***.

STEP 5 – CONFIRMATION

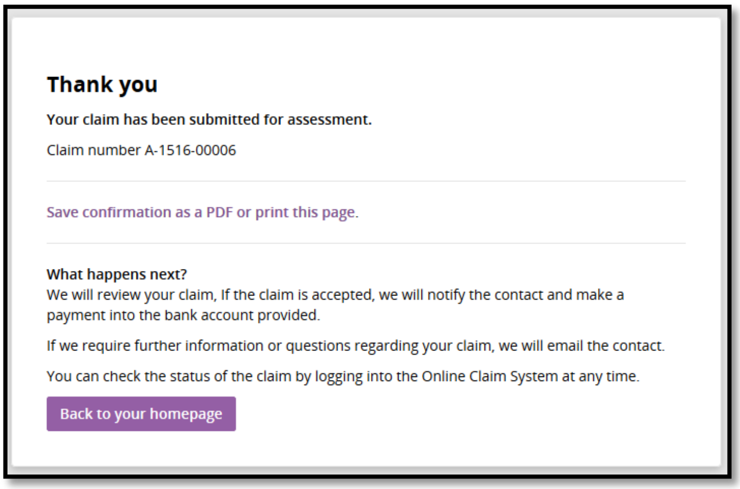
On the confirmation page, a brief summary of the claim and a declaration will be displayed. Double check the claim information is correct. Read and confirm the declaration by checking all the checkboxes. The user must type their first and last names (as they appear on their AUSKey credentials) to submit the declaration.



Ensure the email address in the Remittance advice field is correct and select ***Submit claim >***.

THANK YOU

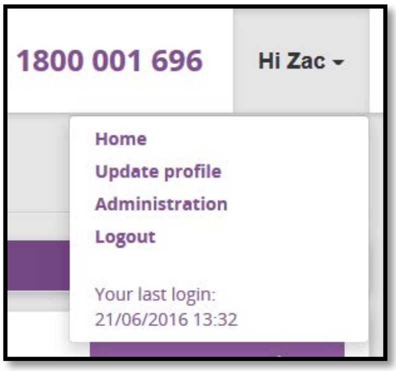
After submitting the claim, a thank you page will be displayed with the claim confirmation available to save or print.



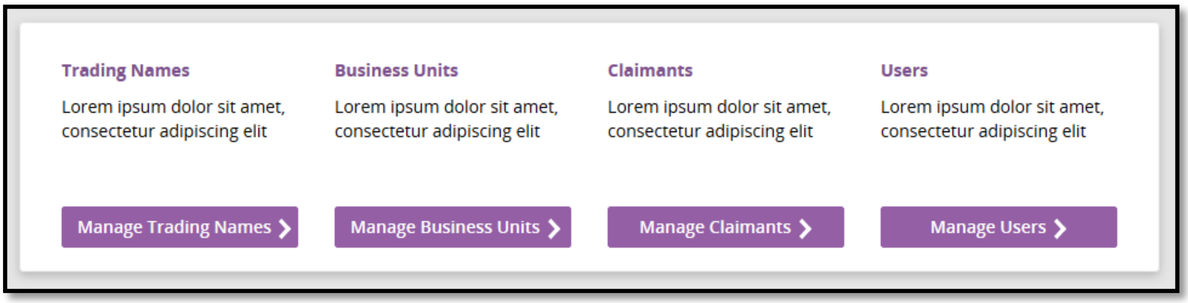
ADMINISTRATOR OPTIONS

Note: This section will only appear for users that have administrative access.

Once logged in as an administrator, the administration options become available. To access these options, click the username in the top right corner of the page, and select ***Administration***.

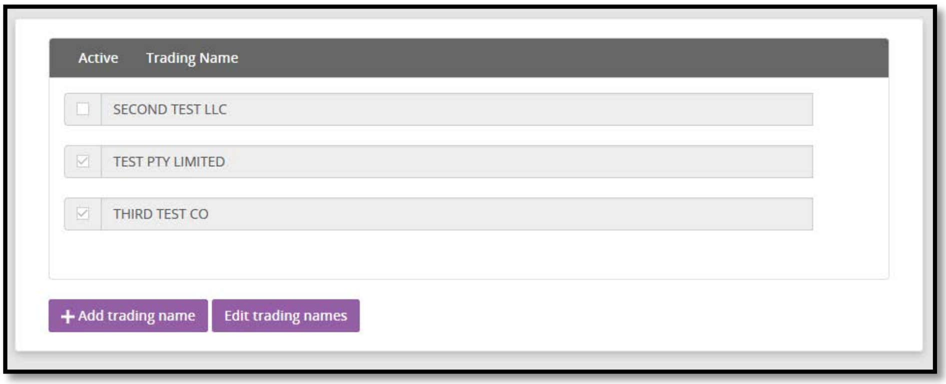


On the Administration page, there are four available options: Trading Names, Business Units, Claimants, and Users.



TRADING NAMES

This page allows the administrator to add, change, activate or deactivate trading names.



1. To add a new trading name, select ***+ Add trading name*** then fill in the name in the new box. Click ***Save***.
2. To edit an existing business unit, select ***Edit trading names***, and make any necessary changes. To deactivate, uncheck the box next to the appropriate trading name. Click ***Save***.

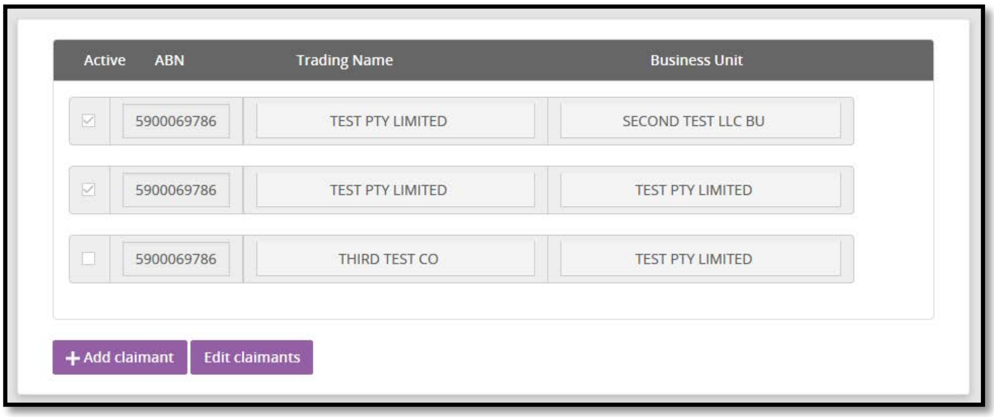
BUSINESS UNITS

This page allows the administrator to add, change, activate or deactivate business units.

1. To add a new business unit, select ***+ Add business unit*** then fill in the name in the new box. Click ***Save***.
2. To edit an existing business unit, select ***Edit business units***, and make any necessary changes. To deactivate, uncheck the box next to the appropriate business unit. Click ***Save***.

MANAGE CLAIMANTS

This page allows the administrator to change, add, activate or deactivate claimants. Note: Deactivating a trading name or a business unit will cause any associated claimants to be deactivated as well.

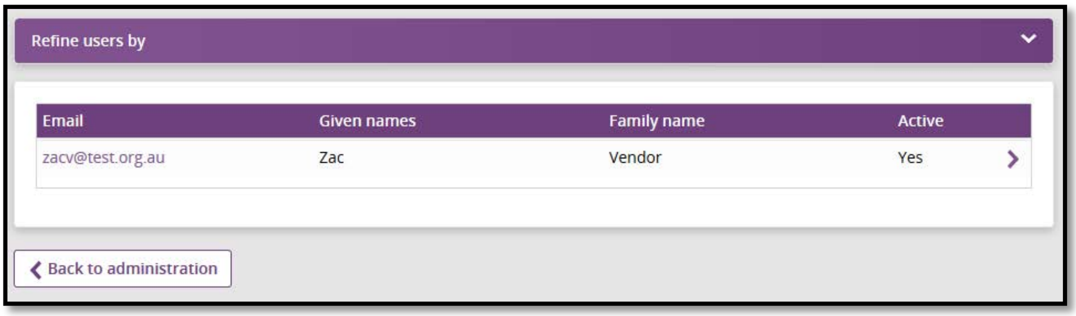


1. To add a new claimant, select ***+ Add claimant***, then select the Trading name and Business Unit from the dropdowns. Click ***Save***.
2. To edit an existing business unit, select ***Edit claimants***, and make any necessary changes. To deactivate, uncheck the box next to the appropriate claimant. Click ***Save***.

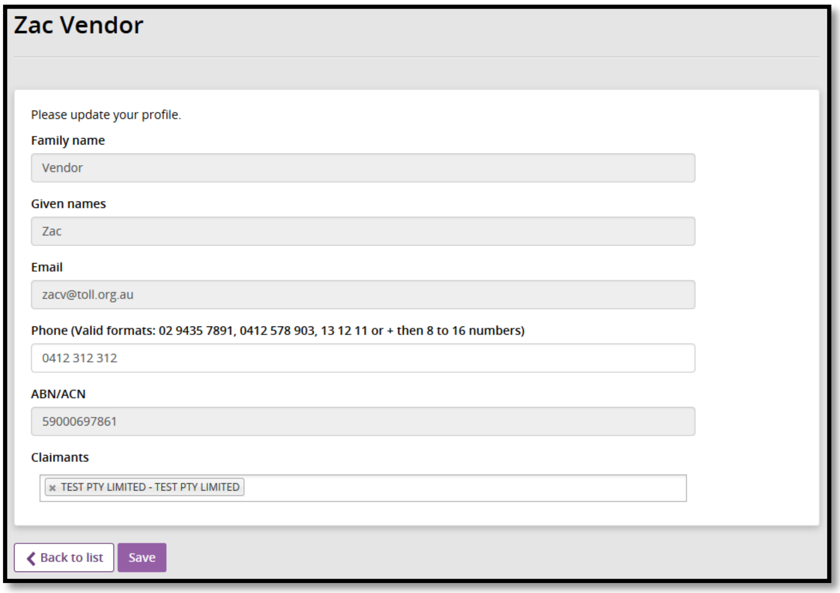
USERS

This page allows the administrator to update the profiles of an existing user. The list can also be filtered by active/inactive users.

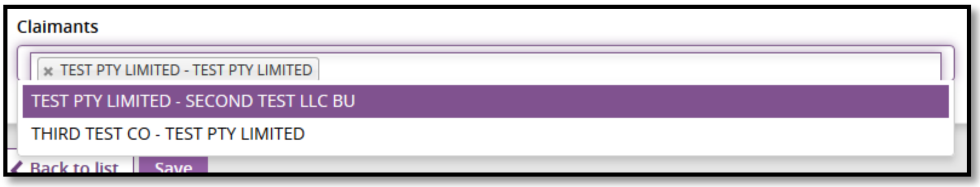
To view the user's profile, select the purple arrow at the end of the row, or the user's email address.



On the user profile page, the phone number can be updated, and the claimants associated to this user can be changed.



To add a claimant, click inside the field and a dropdown of active claimants will appear. Select a claimant and click ***Save***.



To remove a claimant, click the cross next to the claimant's name.