Getting Started

Overview

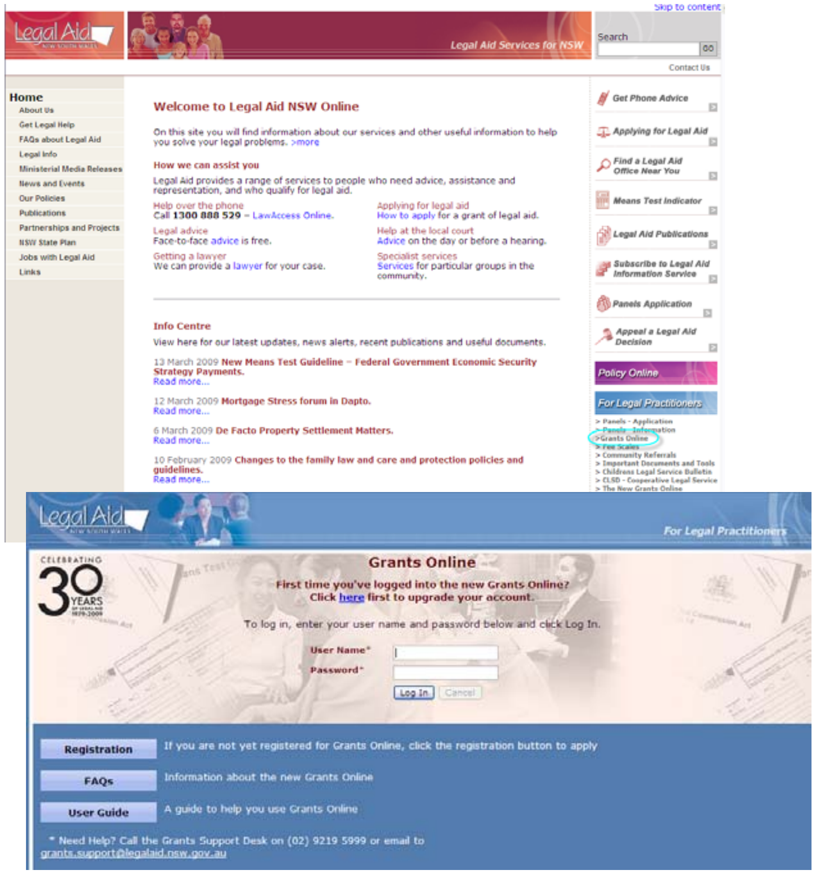
Introduction This chapter introduces you to the Grants Online home page and the noticeboard, and how to log in.

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.

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.

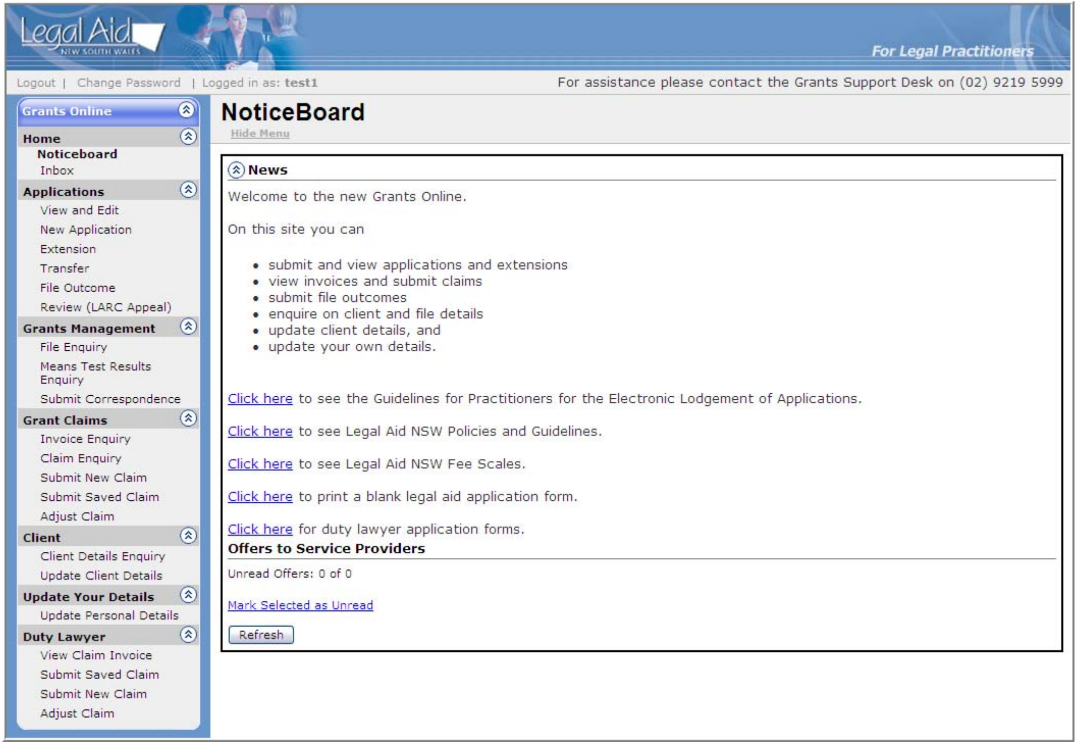
There are two parts to the **Home** toolbar, the **Noticeboard** and the **Inbox** described later in this chapter.

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

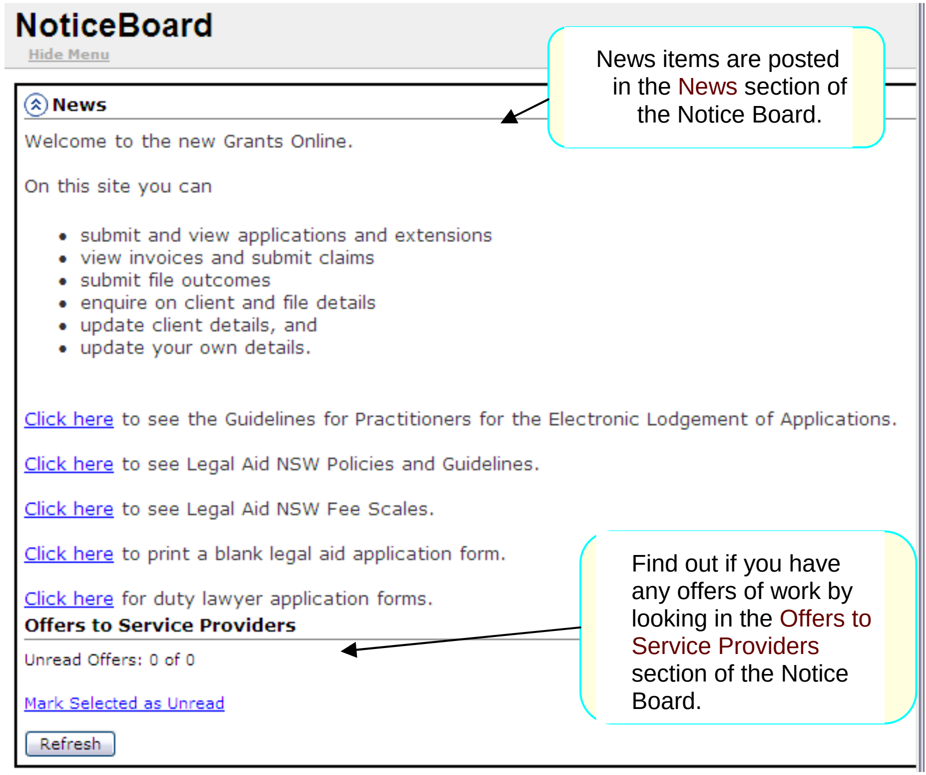


Noticeboard

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.



What is a Service Provider?

The term 'Service Provider' is used to refer to all types of legal practitioners. However, It is 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

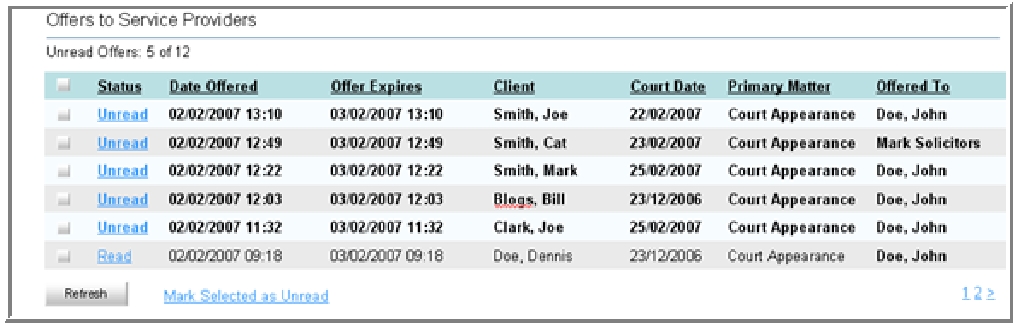
Panel offers

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.



Offers to Service Providers

Unread Offers: 5 of 12

	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 1 2 >

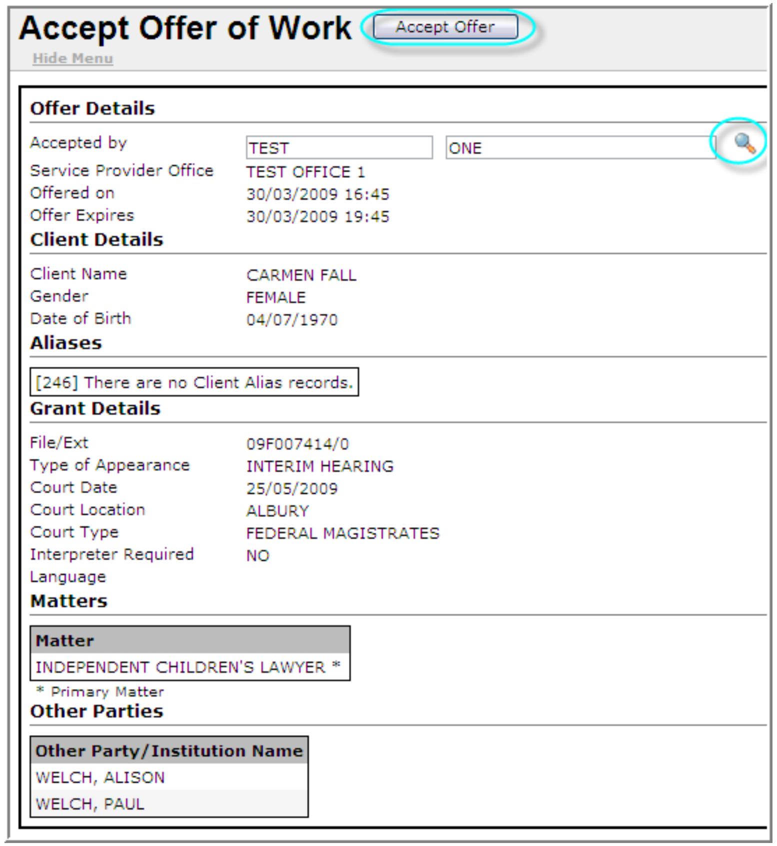
Accepting offers of work

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 the then the offer will not be accepted by you and the above confirmation message will not appear.



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.

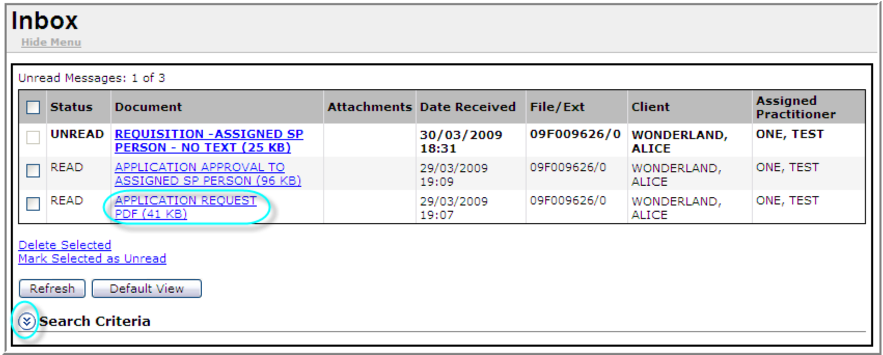
1. Log into Grants Online. The Grants Online **Home** page appears

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

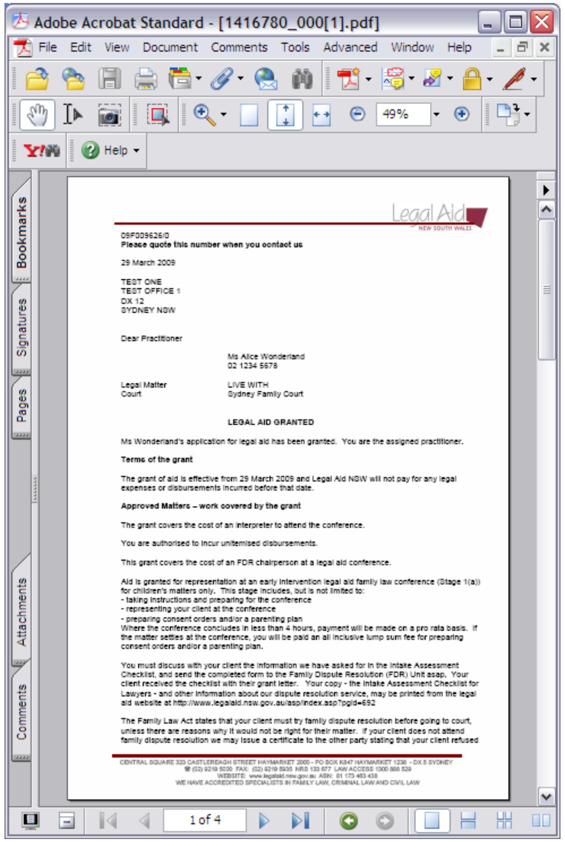
Continued on Next Page

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.

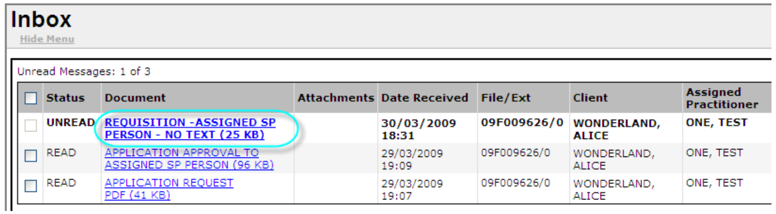


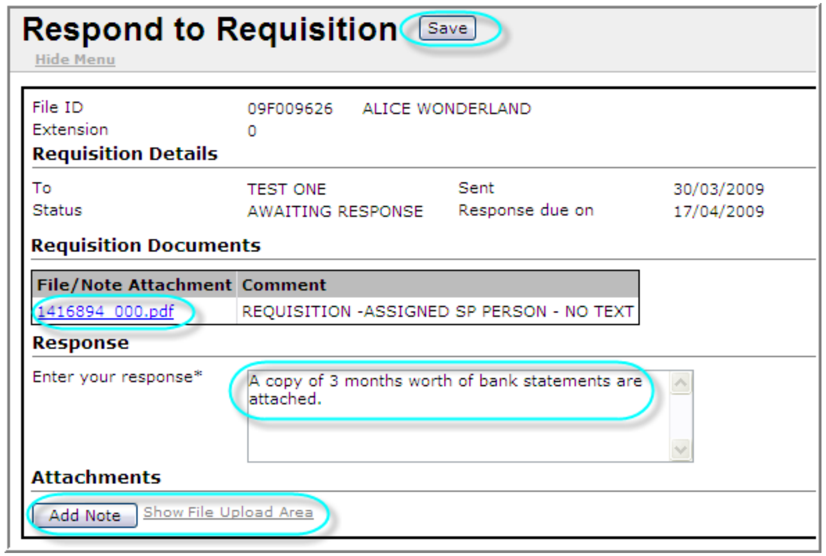
Continued on Next Page

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.





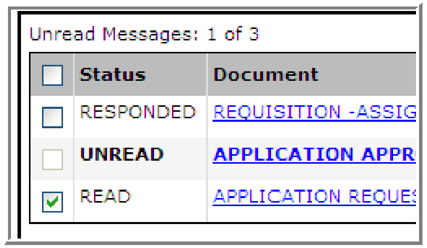
9. After clicking **Save,** a message will appear**:** *Your record was saved successfully*. Click on the **Inbox** menu link

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.



Delete Selected

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

Mark Selected as Unread

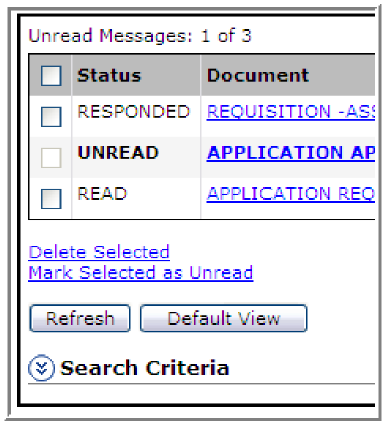
- Click the **Checkbox** to Read Status and click on the **Mark Selected as Unread** link to mark selected Read documents to Unread.

Refresh

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

Default View

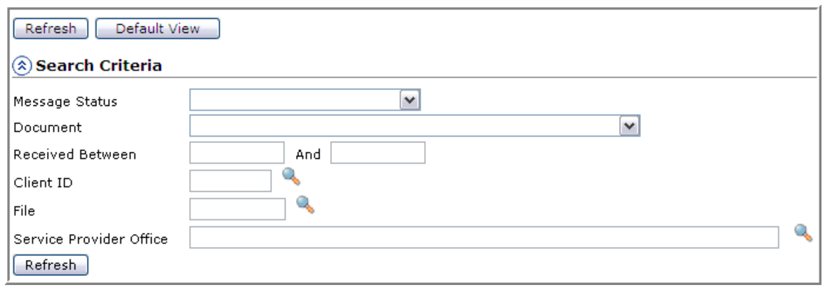
- Click the **Default View** button and the Inbox reverts back to the default view.



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)



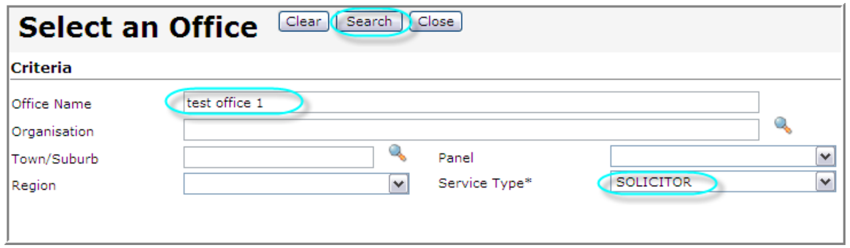
Using the Pick List function - How to select an office

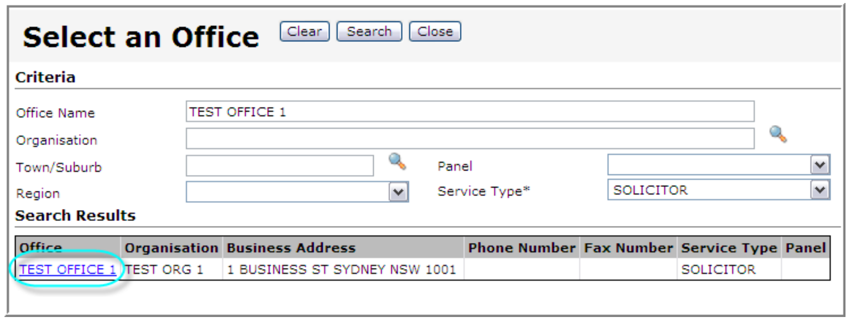
Before you start

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: • 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.





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.

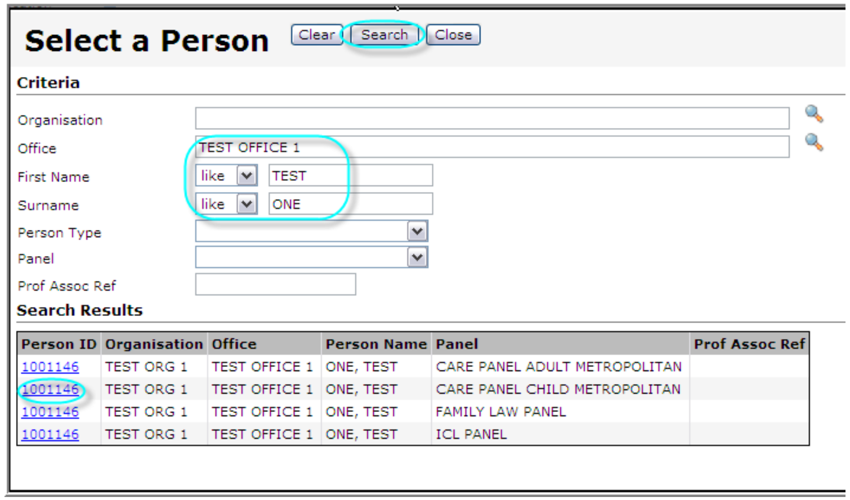
This procedure is most commonly used to select a practitioner name when you are certifying claims.

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.

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.