Lodging other types of applications

Overview

Introduction

This chapter explains how to complete and lodge other types of applications regarding legal aid, such as:

- Extensions
- Reviews
- Transfers
- File Outcomes

Also, View and Edit is covered.

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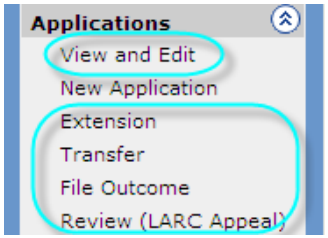
Introduction to other applications

Description

Besides new applications for grants of aid, you can also lodge other types of applications with Legal Aid NSW.

These are the other functions that are listed under the **Applications** heading on the tool bar, as shown opposite.

The table below outlines these applications in more detail.



Note:
These are referred to as 'applications' because they are requests that you need to write on an electronic form online and then submit to Legal Aid NSW.

Name of application	Use this function to
Extension	Submit an extension for a grant of aid for the same client on the same file.
Transfer	Submit a request to transfer a grant of aid to another practitioner or firm.
File Outcome	Record and submit an outcome for the file. This is where you let us know the outcome of the work you have done on the file as funded from the grant of aid.
Review (LARC Appeal)	Submit a request to review the outcome, if a new application or extension for a grant of aid was either refused or you wish to appeal against another outcome.

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Saving or submitting an application

As with new applications for legal aid, you can either save the application or lodge it straight away so that Legal Aid NSW can assess it and make a determination.

Save the application in those cases where you are waiting for further information. You have a 60 day grace period to submit the application once you have created it.

Note:
Lodging an application is also referred to as 'submitting' an application.

Status

Any extension applications that you have saved will be kept in the *Grants Online* system with a status of '**Draft**'.
As soon as an application is submitted, its status will turn to '**Submitted'**.

Legal Aid NSW can only process an application once you submit it.

Note that Legal Aid NSW cannot process applications that you save but do not submit.

You have 60 days to submit an application once you have created and saved it.

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Extension Numbers

Every time you create a new application for an existing file, the *Grants Online* system will assign an Extension number whenever you save an application.

The Extension number acts as a sequence number for the different requests relating to an application.

Example:
When you create the original application, the Extension number will be zero (0).

If you need to request legal aid for further work, you will need to lodge an extension to the original application. In this case, the Extension number for this next request will be one (1), and so on.

If you request a transfer, this request will be given the Extension number (2), and so on.

Before you start

Overview - creating an application

All types of applications in *Grants Online* follow the same general stages when they are created.

These general stages are outlined in the table below.

Stage	Description
1	Select the required application from the tool bar (e.g. **Transfer**). The **Search for File** page will display.
2	Search for and locate the client's file for which you want to lodge the particular application.
3	Fill out the required details on the page or pages for that application.
4	Save or submit the application.
5	Attach any supporting documentation, or a note, if required.
6	Print out and/or save the application, if required.

Note:
These types of applications all relate to an existing grant of aid on the *Grants Online* system.

Therefore, the first step of creating any sort of application will always be to find the existing file.

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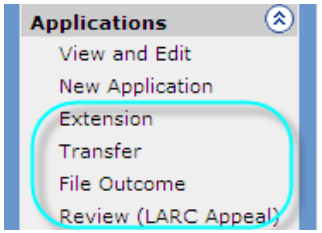
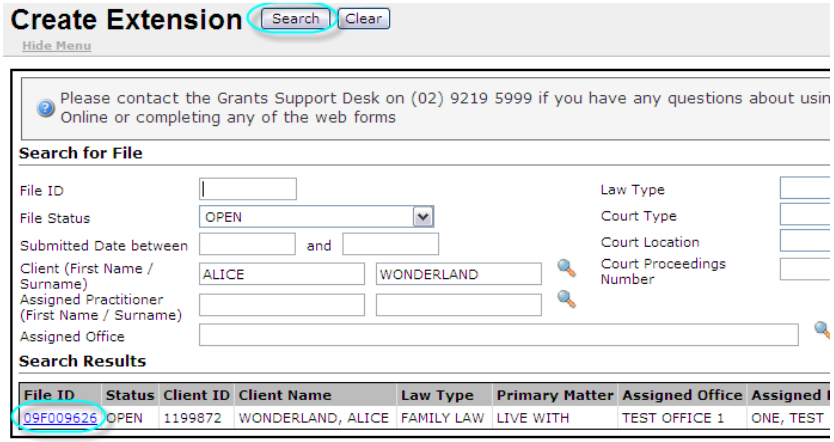
Searching for a file

Follow the steps below to search and locate a client's file via Extension, Transfer, File Outcome, or Review (LARC Appeal) functions.

The steps of searching for a client's file will be the same for every type of application.



Step	Action
1	Select the required application from the tool bar (e.g. **Extension**). The **Search for a File** page for that application will display.
2	Type in the search criteria that you have on hand. For example: • The client's name: type at least three characters from the client's First Name and Surname into the corresponding **Client** fields, or • Practitioner's name: type the First Name and Surname into the corresponding **Assigned Practitioner** fields.
3	Click the **Search** button in the top window button bar. A list of the client's files will display in the **Search Results** at the bottom of the **Search for a File** page. **Note:** If more than 100 rows display in the **Search Results**, type in more search criteria fields (such as date range, File ID) etc.
4	Locate the file you require in the **Search Results**.
5	Click on the **File ID** for the required file. (This will display as a blue hyperlink in the **File ID** column.) The first page of the selected application will display.



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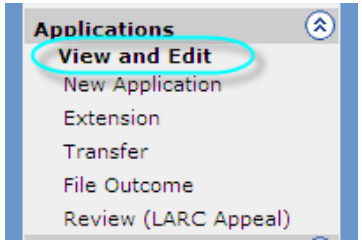
Retrieving a Saved Application – View and Edit

Description

If you want to retrieve any applications that you have saved but not submitted, you need to use **View and Edit** listed on the tool bar (as shown opposite).

The **View and Edit** function is used to retrieve any saved or submitted application. You can update and amend saved application and save again or submit that application. You can view a submitted application



Overview – how to retrieve

Follow the general stages in the table below to retrieve a saved application.

Note:
You can also use this process to retrieve an application that has been submitted.

Stage	Description
1	Search for and locate the saved application, using the **View and Edit** function from the tool bar. (Ensure that you select the correct application type from the **Application Type** drop-down list.)
2	Amend or update the application, if required.
3	**Save** or **Submit** the application.
4	If you save the application, you have 60 days within which to submit it.
5	Attach any supporting documentation, or a note, if required.
6	Print out, View as PDF and/or save the application, if required.

60 day grace period

The 60 day grace period starts from the date the application was originally created.

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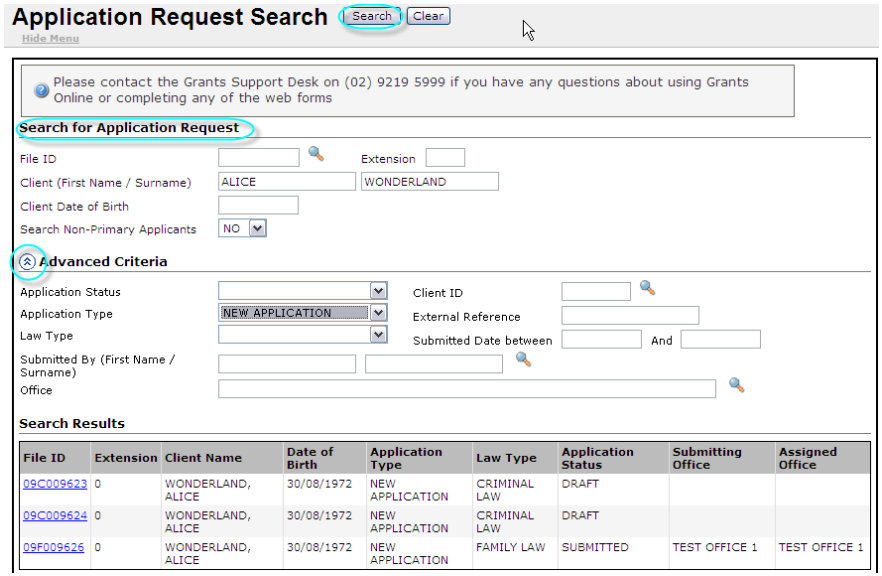
How to retrieve a saved application

Follow the steps below to retrieve an application that you have saved.

Note:
You can also use this procedure to retrieve or view an application that has been submitted.

Step	Action
1	Click **View and Edit** in the tool bar. The **Application Request Search** page displays.
2	Type the File ID or any other identifying piece of data you have on hand into one the search boxes.
3	Click the **Advanced Criteria** arrow.
4	From the **Application Type** drop-down list, select the type of application you are searching for (for example **Record File Outcome)**.
5	Type or select any other search criteria you need to identify the file.
6	Click the **Search** button. A list of files will display in the **Search Results**.
7	Locate the file you require in the **Search Results**.
8	Click on the **File ID** for the required file. (This will display as a blue hyperlink in the **File ID** column.) The first page of the saved application will display.
9	You can now amend your saved application as required, and either submit it or save it again.



Extensions

What is an extension?

If you require a further grant of aid for the same matter, you can lodge an extension application.

This process is known as applying for an extension of aid.

Use the **Extension** function on the tool bar to create and submit your Extension application.

When can I request an extension?

You can lodge an extension application when the previous extension was submitted and granted.

What happens after the extension application

After you lodge the extension application, it will be assessed

We will send a notification to your Inbox on Grants Online letting you know of the outcome of the extension application. An email will be sent to your work email notifying you that the notification is in your Grants Online inbox.

Outstanding invoices

Any outstanding invoices can be submitted after you have completed the work for that extension.

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Saving vs submitting an extension application

You can either **Submit** or **Save** your extension application.

Using the **Submit** option will send the extension application to Legal Aid NSW straight away.

If you do not want to submit your extension application straight away, select the **Save** option instead.

Status

Any extension applications that you have saved will be kept in the Grants Online system with a status of '**Draft**'.

As soon as an application is submitted, its status will turn to '**Submitted'**.

Note:
The only time you need to use the **Save** option is if you want to defer the lodgement of the extension application to a later time.

Do not use the **Save** option in order to keep a copy of the extension application for your own records.

The *Grants Online* system will automatically save a copy of any extension application you submit, for you to view at any time later. You can also print out a hard copy of the extension application (or save a copy to your own computer) at the end of the procedure. And you can view as a PDF.

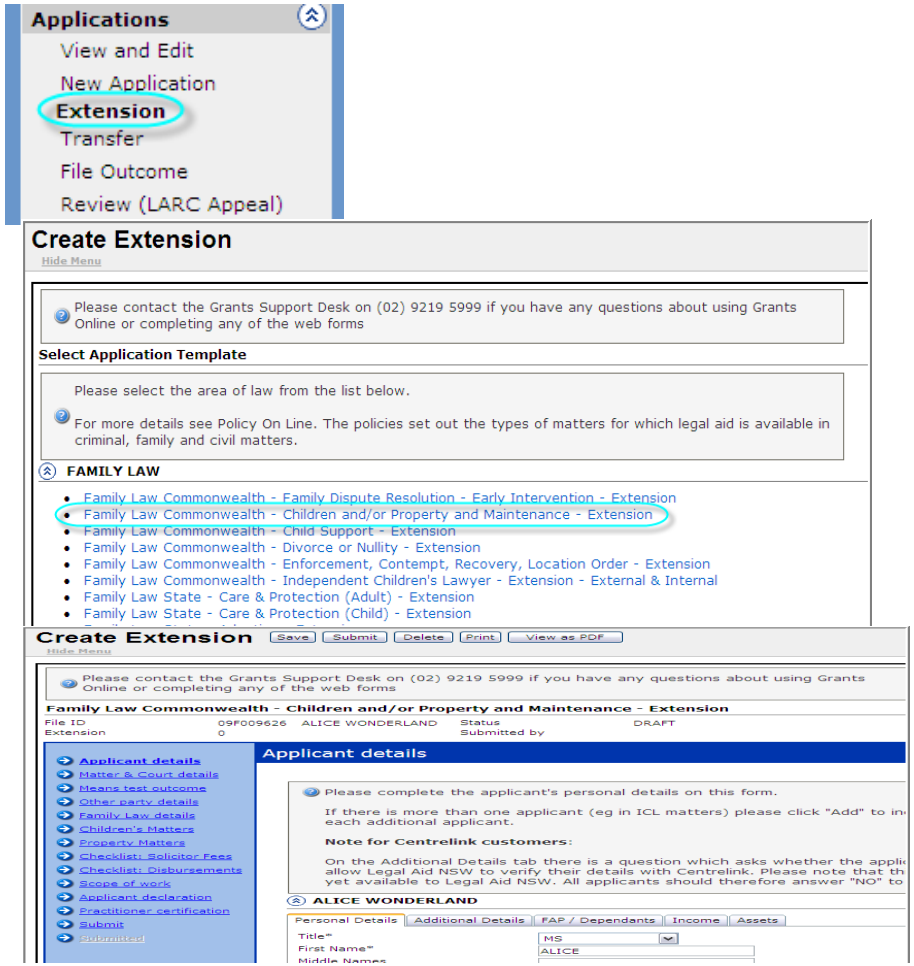
Retrieving a saved extension application

Use the **View and Edit** function in the tool bar to retrieve any extension applications that you have either saved or submitted.

How to create a new extension

Follow the steps below to create a new extension on an existing file.

Step	Action
1	Log into *Grants Online*. The Grants Online **Home Page** displays.
2	Select **Extension** from the tool bar. The **Create Extension** page displays, showing the **Search for File** section.
3	Search for the file that you are looking for. A list of files will display in the **Search Results**.
4	Click on the required file in the **Search Results** list. The **Select Application Template** page displays with a list a application templates within the file's law type.
5	Select the application template for the extension. The **Applicant details** page displays, showing your client's existing details.
6	Scan through the client's details to make sure they are up to date, using the arrow buttons.
7	Update any details, if required. Click the **Next** button.
8	Complete the rest of the application form as outlined previously. See creating a new application. This is the end of the procedure.

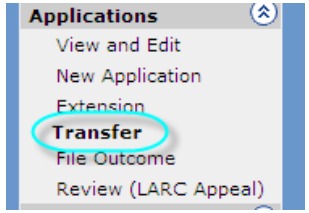


Transfers

What is a transfer?

If you decide you can no longer work on an application of aid you can request a file transfer.

This process is known as submitting a Transfer request.



Use the **Transfer** function on the tool bar to create and submit your Transfer application/request.

When can I request a transfer?

You can request a transfer when:

- You are not available;
- Your firm is not available;
- Expertise is required;
- The matter is not within your jurisdiction;
- Certain client circumstances arise;
- Your client requests a transfer; or
- There is conflict

What happens after the transfer request?

After you lodge the Transfer request, we will assess and either approve or refuse the transfer. If the transfer is approved, an extension is created and the matter is assigned to another practitioner. We will send notification letters to the following people:

1. You, to confirm the transfer has or has not taken place
2. To the receiving practitioner, to provide them with a grant or refusal of aid.
3. Your client, to confirm that their grant of aid has or has not been transferred to the receiving practitioner.

Note:
We will send a notification to your Grants Online Inbox letting you know of the outcome of the Transfer request

Outstanding invoices

You will still have access to claim on invoices with unclaimed available amounts where the extension is assigned to your firm.

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Saving vs submitting a transfer request

You can either **Submit** or **Save** your Transfer Request application.

Using the **Submit** option will send the Transfer Request to Legal Aid NSW straight away.

If you do not want to submit your Transfer Request straight away, select the **Save** option instead.

Note:
The only time you need to use the **Save** option is if you want to defer the lodgement of the Transfer Request to a later time.

Do not use the **Save** option in order to keep a copy of the Transfer Request application for your own records.

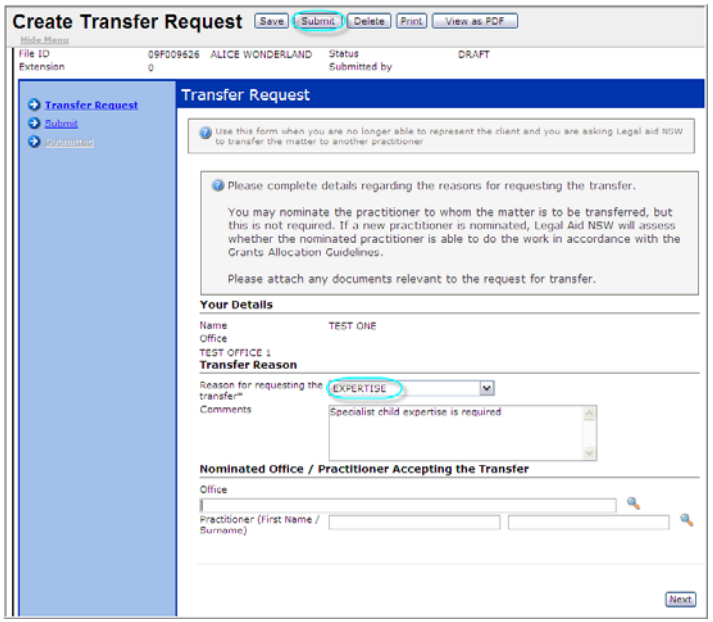
The *Grants Online* system will automatically save a copy of any Transfer Request you submit, for you to view at any time later.

You can also print out a hard copy of the Transfer Request (or save a copy to your own computer) at the end of the procedure.

How to submit a Transfer Request

Follow the steps below to submit a transfer request to Legal Aid NSW.

Step	Action
1	Log into *Grants Online*. The Grants Online **Home Page** displays.
2	Select **Transfer** from the tool bar. The **Create Transfer Request** page displays, showing the **Search for File** section.
3	Search for the file that you are looking for. A list of files will display in the **Search Results**.
4	Click on the required file in the **Search Results** list. The **Create Transfer Request** page displays.
5	Select a reason from the **Reason for requesting the transfer** drop-down list. Some Reasons will make a **Comments** field appear. If the comments field appears then you must explain the reason for the transfer.
6	Enter the Nominated **Office** and/or **Practitioner** accepting the Transfer if required. Otherwise leave these fields blank. **Note:** You must use the **Pick Lists** to find and enter the office and/or practitioner.



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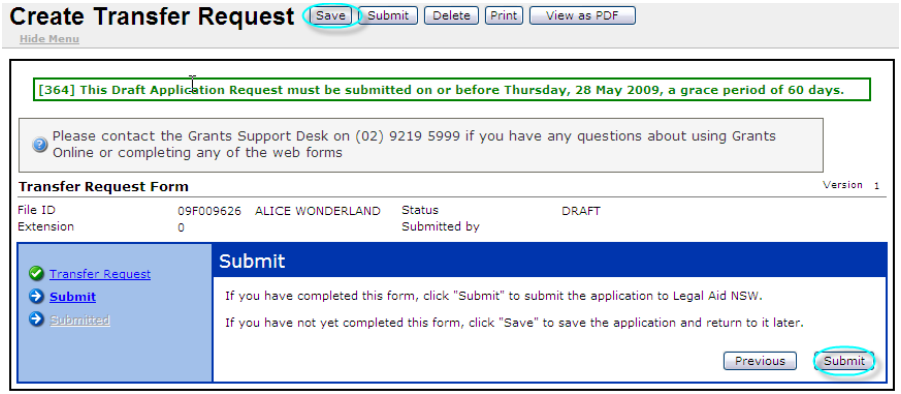
Continue the steps below to submit a transfer request to Legal Aid NSW.

Step	Action
8	Click the **Next** button. The **Submit** page displays.
9	Click the **Save** or **Submit** button.
10	**Attach supporting documents** or add a **Note** if required.
11	On the **Attach Supporting Documents** window, click the **Continue** button. The **Application Request Enquiry** page displays, showing your completed Transfer Request application in full.
12	Print or save your Transfer Request application, as required. This completes the procedure.

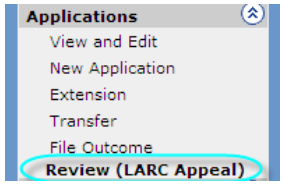


Review (LARC Appeal)

What is a review?

If you receive a decision letter from us refusing some or all of your request for aid, you can lodge an appeal.

This process is known as lodging (or submitting) a Review application.



Use the **Review** function on the side tool bar to create and submit your Review application.

When can I lodge a review?

Ideally, lodge the review application within 28 days of receiving the decision letter.

If you lodge a review application after the 28 day period has elapsed, you will need to provide a reason why your application is 'out of time'.

What happens after lodgement?

After you lodge the Review application, Legal Aid will assess your request for review and notifications will be sent to your Grants Online Inbox regarding the outcome of the Review within a certain length of time.

Saving vs submitting a review

You can either Submit or Save your Review application.
Submitting will send the Review to Legal Aid NSW straight away.
If you do not want to submit your Review application straight, select the **Save** option instead.
You only need to use the **Save** option if you want to defer the lodgement of the Review application to a later time.

Note:
The *Grants Online* system will automatically save a copy of any Review application you submit, for you to view at any time later – so you do not need to use the **Save** option in order to keep a copy of the Review application for your own records.

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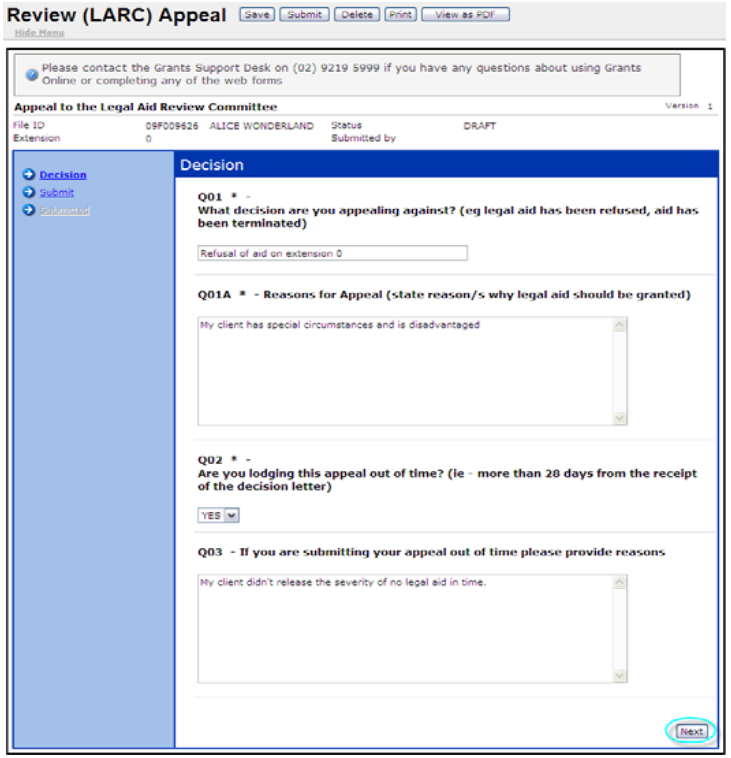
How to Submit a Review (LARC Appeal)

Follow the steps below to lodge a review with Legal Aid NSW.

1. Log into *Grants Online*.
   The Grants Online **Home Page** displays.
2. Select **Review (LARC Appeal)** from the tool bar.
   The **Review (LARC Appeal)** page displays, showing the **Search for File** section.
3. Search for the file that you are looking for.
   A list of files will display in the **Search Results**.
4. Click on the required file in the **Search Results** list.
   The **Decision** page displays.
5. Type the decision that you are appealing against into the **Q01** field.
6. Type the reason(s) for the appeal into the **Q01A** field.
   Explain why you think legal aid should be granted.
7. Are you lodging this appeal out of time?
   Your appeal will be out of time if you lodge it more than 28 days after receiving the decision letter.



If …	Then …
No	Select **NO** from the **Q02** drop-down list. Continue to the next step.
Yes	Select **YES** from the **Q02** drop-down list. Enter the reason why it is out of time. Continue to the next step.

Continued

Continue the steps below to lodge a review with Legal Aid NSW.

8 Click the **Next** button.

The **Submit** page displays.

9 Do you want to lodge this appeal straight away?*

If …	Then …
Yes	Click the **Submit** button. The **Attach Supporting Documents** window displays. Continue to the next step.
No–you want to save it and lodge it at a later time	Click the **Save** button. This completes the Review lodgement procedure.

Notes

* The *Grants Online* system will automatically save a copy of this Review application for you to view at any time later – you do not need to click the **Save** button in order to keep a copy of this Review application. (You only need to click the **Save** button if you want to save the Review for lodgement at another time.)

10 Do you want to attach supporting documents or add a note?

If yes, attach the document(s) or add the note.

If no, continue to the next step.

11 On the **Attach Supporting Documents** window, click the **Continue** button.

The **Application Request Enquiry** page displays, showing your completed Review application in full.

12 Print or save your Review application, as required.

This completes the Review lodgement procedure.

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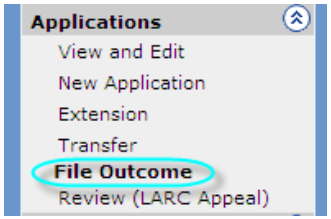
How to Submit a File Outcome

Description

The **File Outcome** page is where you record the outcome of the work you have done for the grant of aid.
You can access the File Outcome via

- the Grants Online menu or
- via the **Record File Outcome** button on a Claim when requesting that the claim is the final claim for the file.

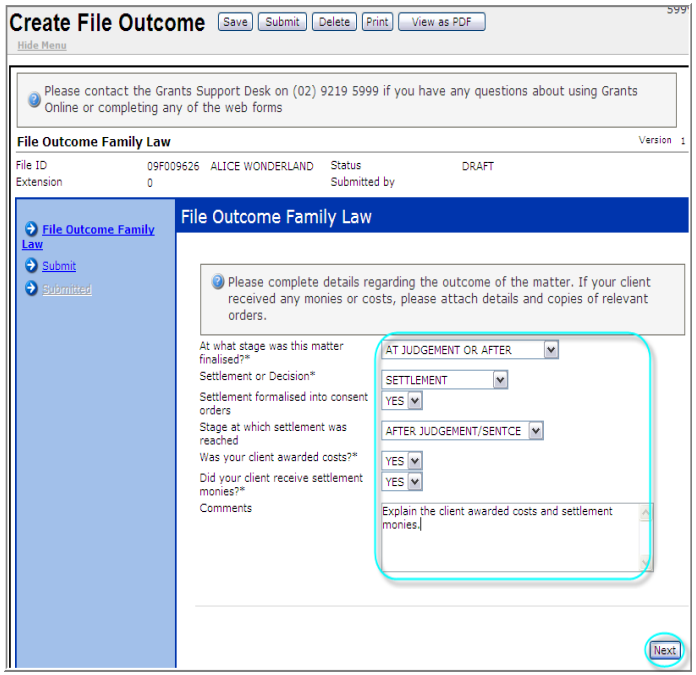


Complete the **File Outcome** page and then submit it. You need to do this when work is complete on the grant of aid.

File outcome

Follow the steps below to record an outcome for a file.

Step	Action
1	Log into *Grants Online*. The Grants Online **Home Page** displays.
2	Click **File Outcome** (under the **Applications** heading) on the tool bar. The **Create File Outcome** page displays, showing the **Search for File** section.
3	Search for the file you want to lodge a file outcome on. You can use any of the boxes on this page to enter identifying data that will locate the file.
4	Click the **Search** button. A list of client's names and file details will display in the **Search Results** section of the page.
5	Click on the **File ID** number (highlighted in blue) that you are looking for. The **File Outcome** page displays, showing the **File Outcome** section.



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Continue following the steps below to record an outcome for a file.

Step	Action
6	Complete the following boxes on this page:

Name of box	Do this …
At what stage was this matter finalised?	Select the required option from the drop-down list.
Settlement or decision?	Was a Settlement reached? If no, select the required decision option from the drop-down list. If yes, follow these steps: • Select **Settlement** from the drop-down list • Select **Yes** or **No** to record if the settlement was formalised into consent orders • Select which stage settlement was reached from the drop-down list.
Was your client awarded costs?	Select either **Yes** or **No** from the drop-down list. **Note:** If you select **Yes**, a **Comments** box will display. Type in the details of the awarded costs into the **Comments** box.
Did your client receive settlement monies?	Select either **Yes** or **No** from the drop-down list. **Note:** If you select **Yes**, a **Comments** box will display. Type in the details of the client settlement monies into the **Comments** box.

7	Click the **Next** button. The **File Outcome** page displays, showing the **Submit** section.

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How to record a file outcome

Continue following the steps below to record an outcome for a file.

Step	Action
8	What action do you want to take regarding this file outcome record?

If you need to …	Then …
Save it	Click the **Save** button (in the top button bar). **Note:** This will save this file outcome record in the *Grants Online* system. You will have 60 days in which to submit it.
Print it or view it as a PDF file	Click either the Print or View as PDF button. **Note:** If you want to save this file outcome record to your own computer, you can do so after viewing it as a PDF file.
Submit it to Legal Aid NSW	Click the **Submit** button Submit (located in two places on this page, in the top button bar and at the bottom of the page.
Go back to correct any entries on the previous page	Click the **Previous** button, Previous and make any amendments required. Click the **Next** button to return to the **Submit** page.
Delete it (after having saved it in error)	Click the **Delete** button Delete (in the top button bar).

9 This completes the procedure.