

[aDVance Version 6 Upgrade – EAS NEW CLAIMS GUIDE](#)

This guide is designed to assist EAS staff understand the changes to EAS processing under the aDVance Version 6 upgrade.

[Processing an EAS claim:](#)

[Assumptions:](#)

- All registration and aDVance relationships have been created;
- The creation of Payment Accounts, Guardians and TFN recording has been done.

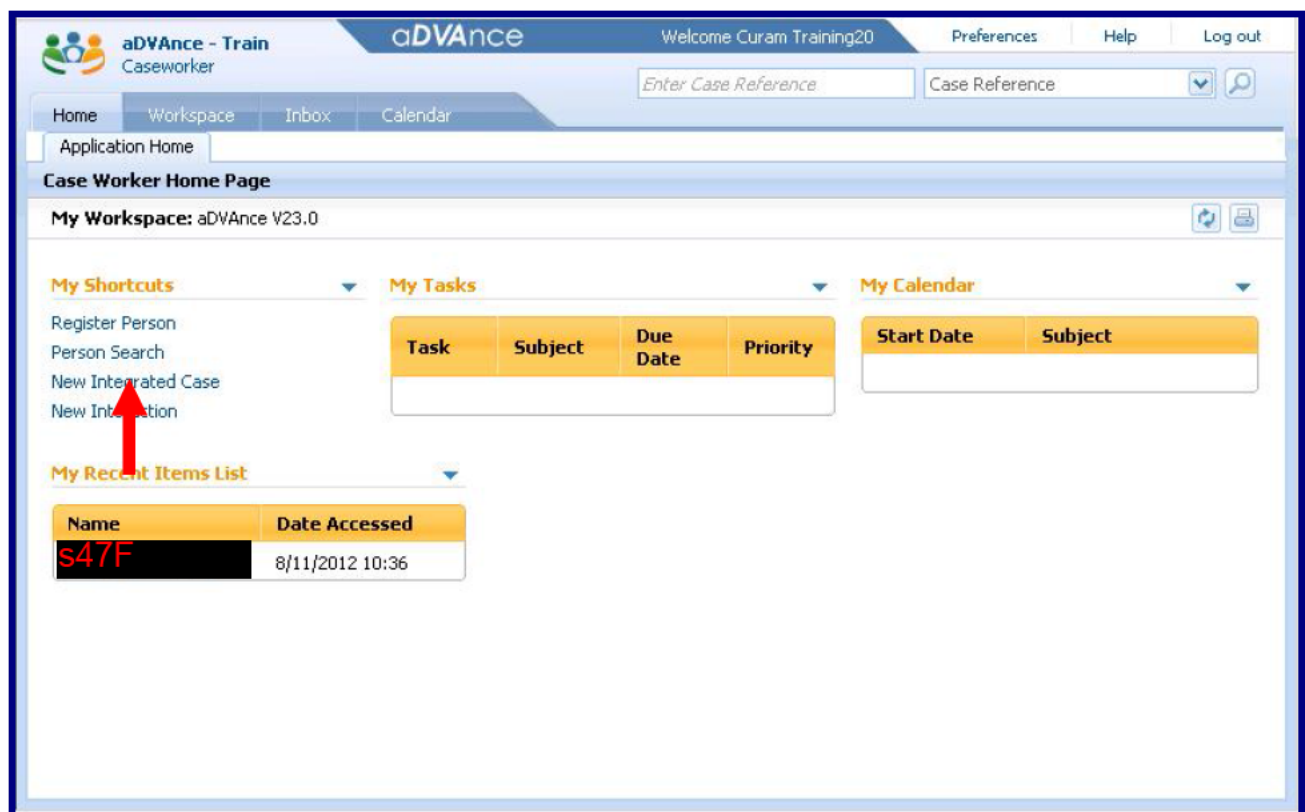
[Step 1 – Check does the veteran’s Integrated Case exist?](#)

Conduct a Person Search for the veteran & check for existing cases.

If an Integrated Case does exist for the veteran then check does the student child already have an EAS Product Delivery case.

Note: If the veteran’s Integrated Case exists but the student child is not a Case Member proceed to Step 3.

[Step 2 - Create the veteran’s Integrated Case](#)



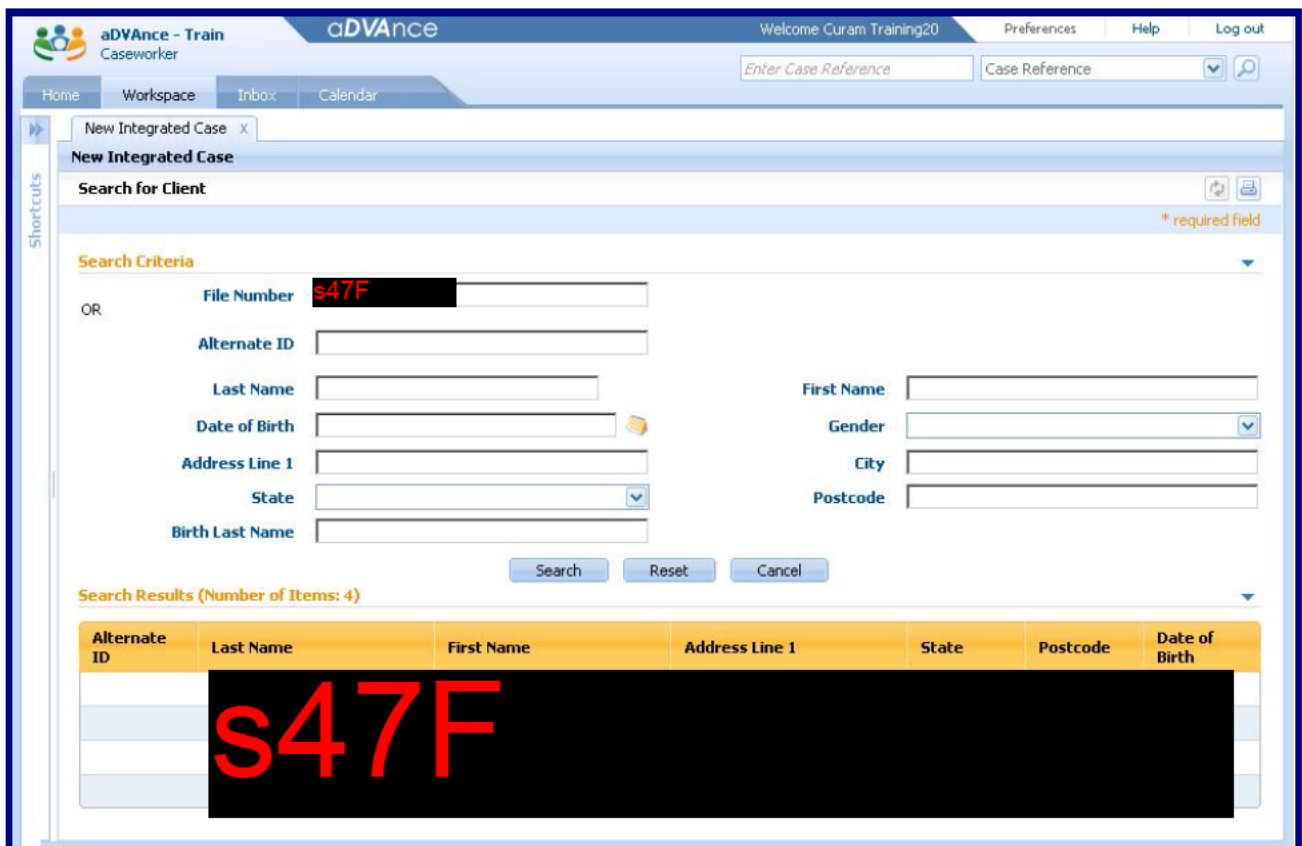
The screenshot displays the aDVance Caseworker interface. At the top, there is a navigation bar with 'aDVance - Train Caseworker' and 'aDVance' logos, along with user information 'Welcome Curam Training20' and links for 'Preferences', 'Help', and 'Log out'. Below this is a search bar for 'Case Reference'. The main content area is titled 'Case Worker Home Page' and shows 'My Workspace: aDVance V23.0'. There are three main sections: 'My Shortcuts', 'My Tasks', and 'My Calendar'. In the 'My Shortcuts' section, a red arrow points to the 'New Integrated Case' link. Below this is a 'My Recent Items List' table with one entry: 's47F' accessed on '8/11/2012 10:36'.

Name	Date Accessed
s47F	8/11/2012 10:36

From your User Home Page click **New Integrated Case**.

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Conduct a Person Search for the veteran.

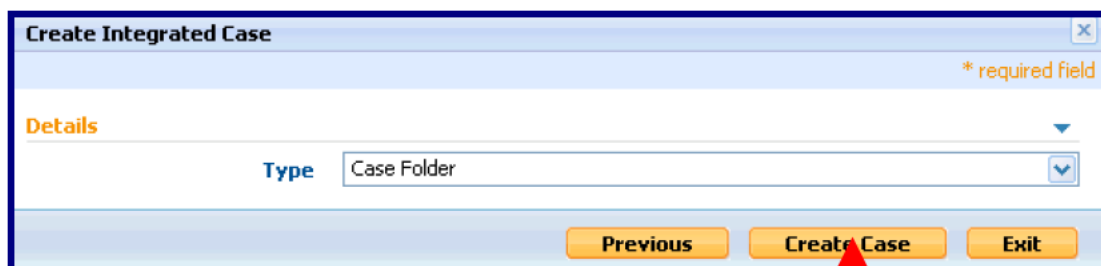


The screenshot shows the aDVance software interface. At the top, there is a navigation bar with 'Home', 'Workspace', 'Inbox', and 'Calendar'. Below this is a 'Search for Client' section with various input fields. The 'File Number' field is filled with 's47F'. Below the search criteria, there are buttons for 'Search', 'Reset', and 'Cancel'. The search results are displayed in a table with the following columns: Alternate ID, Last Name, First Name, Address Line 1, State, Postcode, and Date of Birth. The first row of the table has a large red 's47F' overlaid on the 'Last Name' column.

Alternate ID	Last Name	First Name	Address Line 1	State	Postcode	Date of Birth
	s47F					

Select the veteran's Last Name.

The Create Integrated Case page displays.

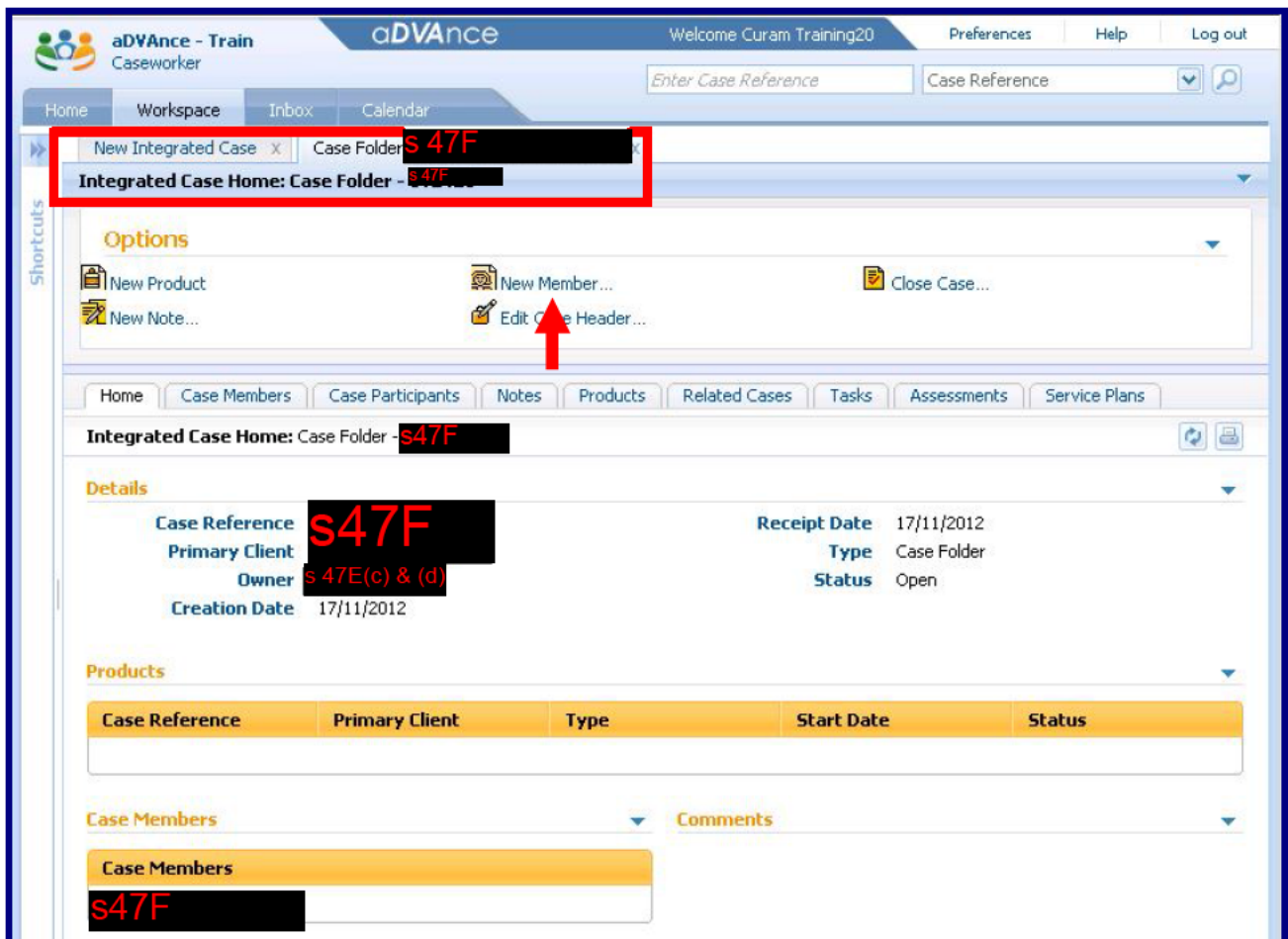


The screenshot shows a 'Create Integrated Case' dialog box. It has a 'Details' section with a 'Type' dropdown menu set to 'Case Folder'. At the bottom, there are three buttons: 'Previous', 'Create Case', and 'Exit'. A red arrow points to the 'Create Case' button.


Click **Create Case** to proceed with the case creation.

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The veteran's Integrated Case is created in a new tab.



Step 3 – Add the student child as a Case Member

In the Integrated Case Options panel click  New Member.

The New Member screen displays.

Click  and search for the student child.

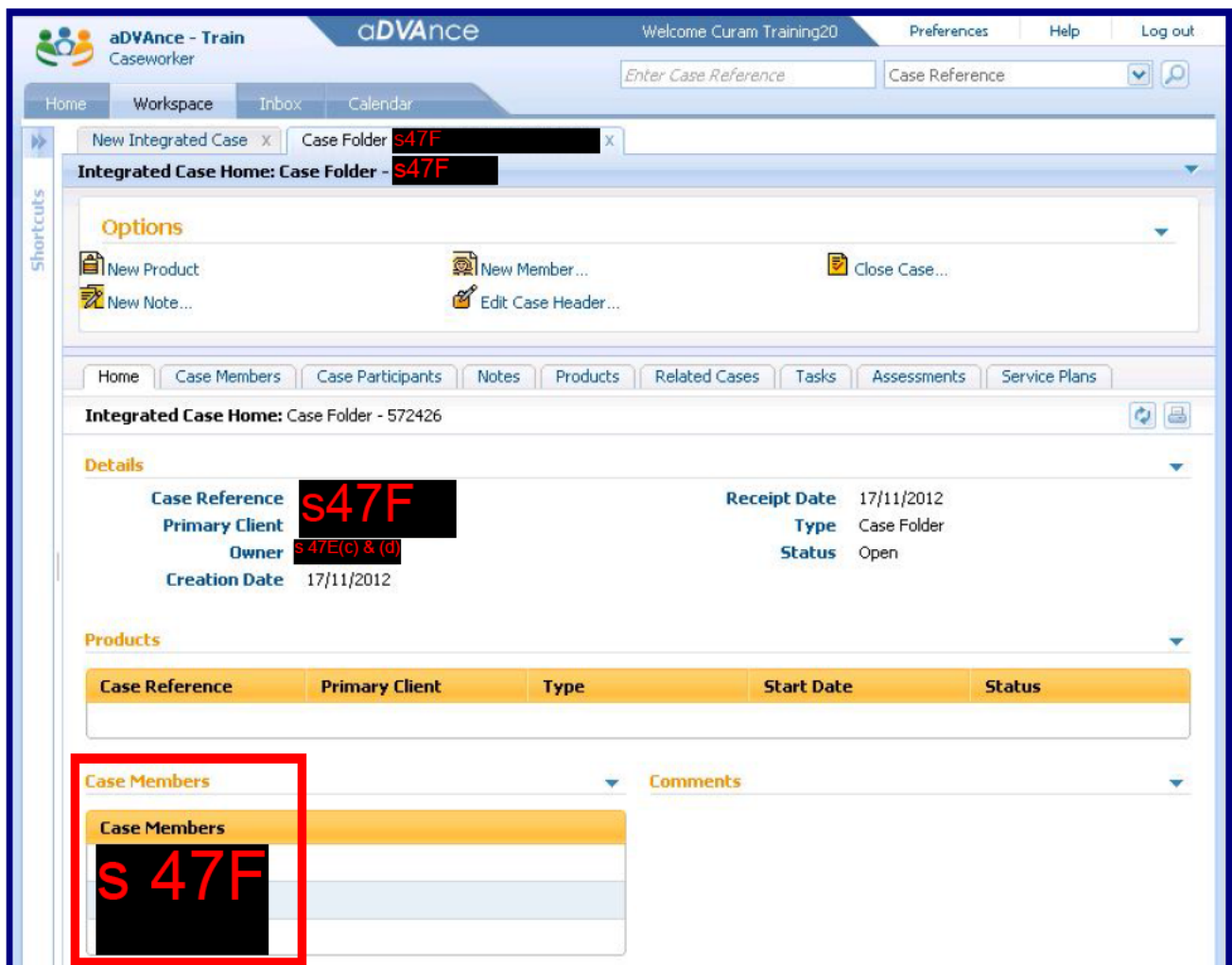
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Following a successful search the student child displays in the New Member screen.



Click **Save** to add the child as a Case Member or **Save & New** to add the child as a Case Member and add another family member.

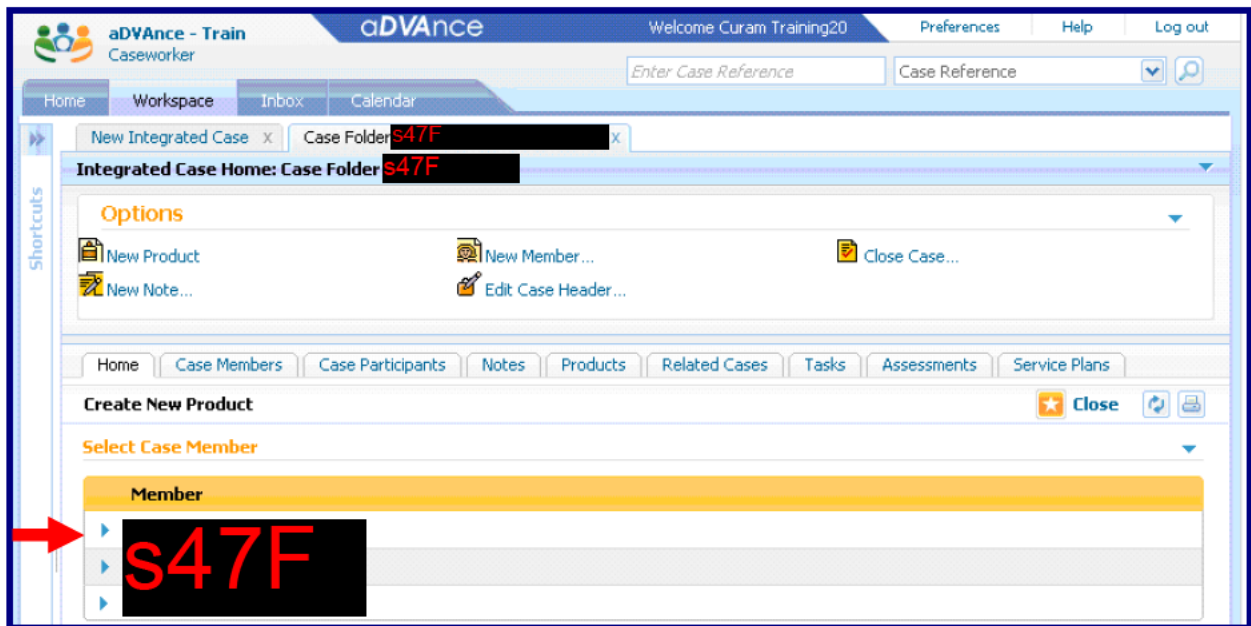
The student child/children display in the Case Members panel.




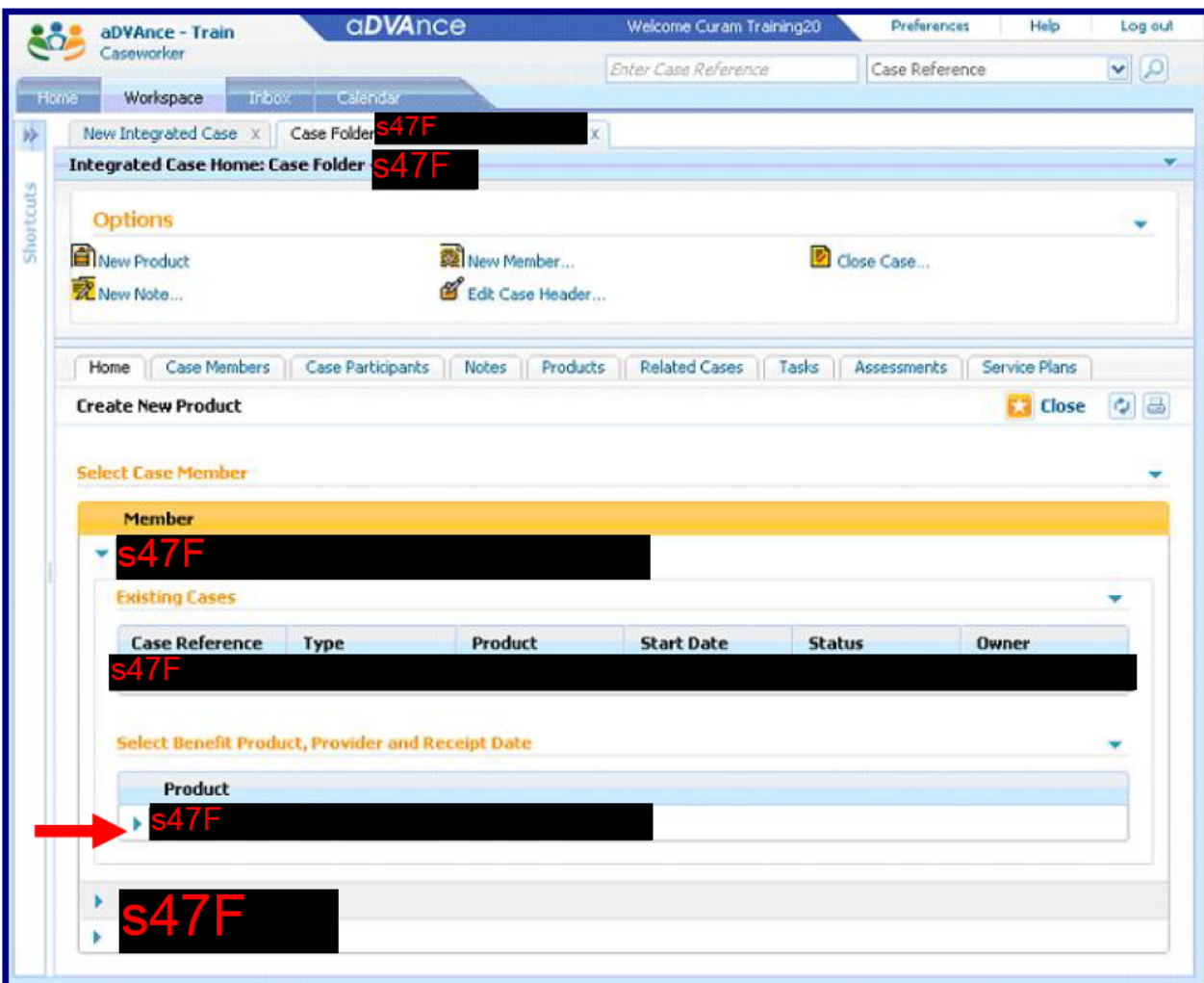
Click **New Product** to commence creating the EAS Product Delivery Case.


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Step 4 - Create the EAS Product Delivery Case:



Select Case Member – click  alongside the student child's name.



Select Product - click  alongside Education Assistance.

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Select Benefit Product, Provider and Receipt Date panel

The Select Benefit Product, Provider and Receipt Date panel expands to display the DVA Location and Receipt Date fields.

DVA Location drop-box – select the required DVA Office.

Receipt Date field – record the actual Receipt Date of the claim – either use the calendar or manually record the Receipt Date.

The screenshot shows the aDVance software interface. The top navigation bar includes the aDVance logo, user information (Welcome Curam Training20), and navigation links (Preferences, Help, Log out). The main workspace is titled 'Create New Product' and features a 'Select Case Member' dropdown menu. Below this, there is a table for 'Existing Cases' with columns for Case Reference, Type, Product, Start Date, Status, and Owner. The 'Select Benefit Product, Provider and Receipt Date' section is expanded, showing a 'Product' dropdown menu, a 'DVA Location' dropdown menu, and a 'Receipt Date' field. A red arrow points to the 'Create Delivery' button.

Click .

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The Education Assistance Product Delivery Case has been created and displays in the student child's Existing Cases panel within the veteran's Integrated Case.

The screenshot displays the aDVance software interface for a caseworker. The top navigation bar includes 'Home', 'Workspace', 'Inbox', and 'Calendar' tabs. Below this is a 'Shortcuts' panel with options like 'New Product', 'New Note...', 'New Member...', and 'Edit Case Header...'. The main content area is titled 'Create New Product' and features a 'Select Case Member' dropdown menu. Underneath, there are two 'Existing Cases' panels, each with a table showing case details. The first table has columns for Case Reference, Type, Product, Start Date, Status, and Owner, with a row containing 's47F'. The second table has the same columns, with a row containing 's47F' and 'Curam Training20' in the Owner column. A 'Product' dropdown menu is also visible, showing 's47F'.

Step 5 - Access the student's EAS Product Delivery Case:

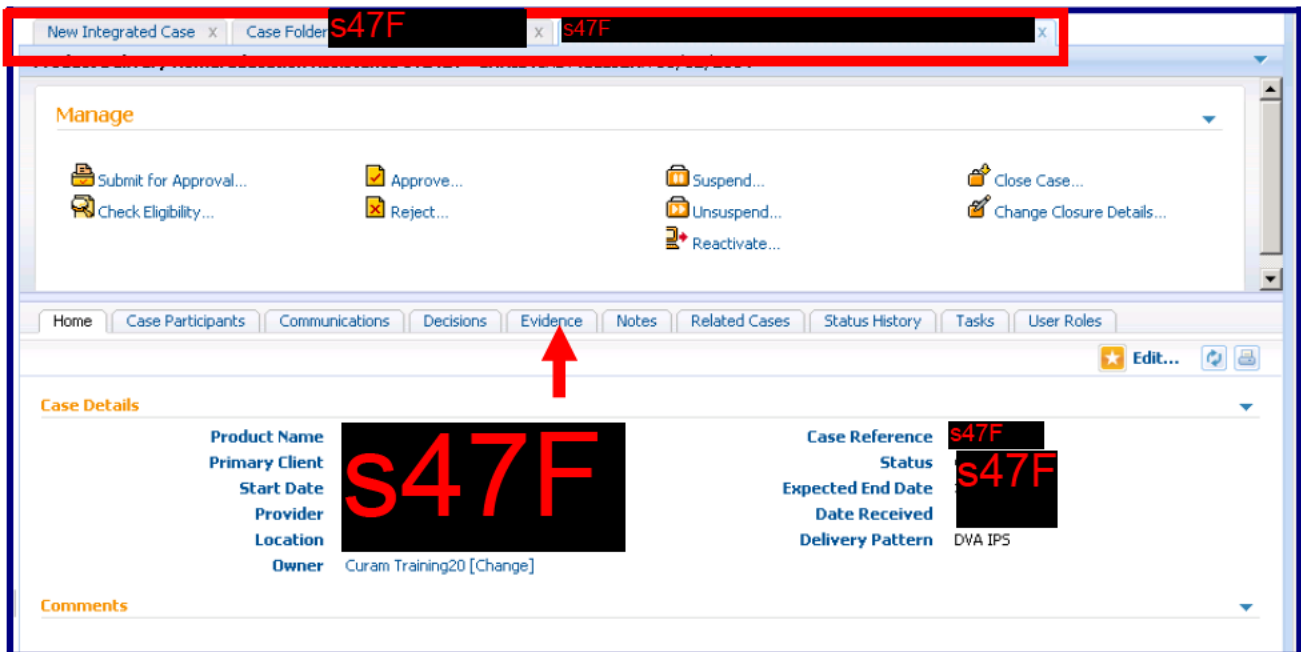
Access the student child's EAS Product Delivery Case from either:

1. the Products tab of the veteran's Integrated Case; or
2. the Case Reference number in the Existing Cases panel of the veteran's Integrated Case.

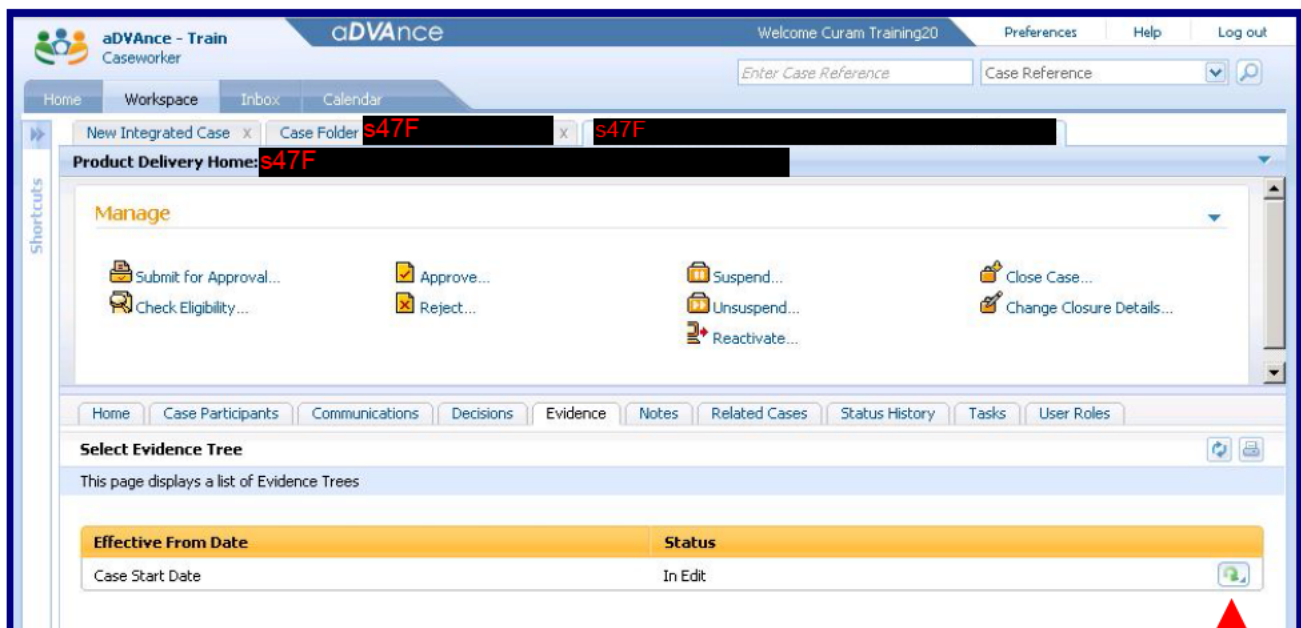
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Education Assistance – Product Delivery Home Page


The EAS Product Delivery Home Page displays in a new tab.

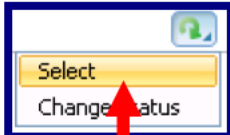


Access the Evidence tab.



The initial Evidence Tree is listed.

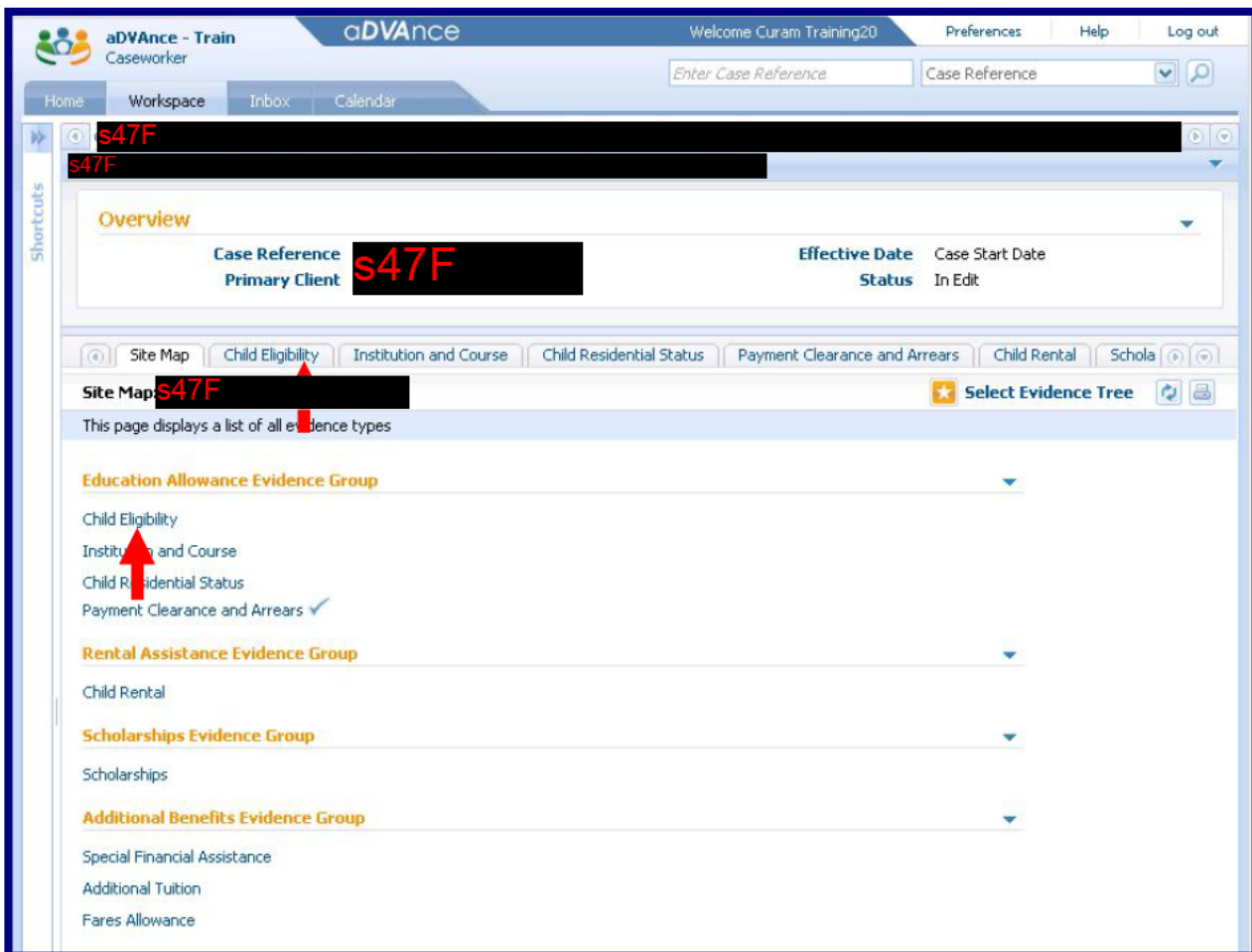
To access the Evidence Tree click  the Evidence Tree Action icon located on the right hand side.

The Evidence Tree Action menu displays  - click Select.

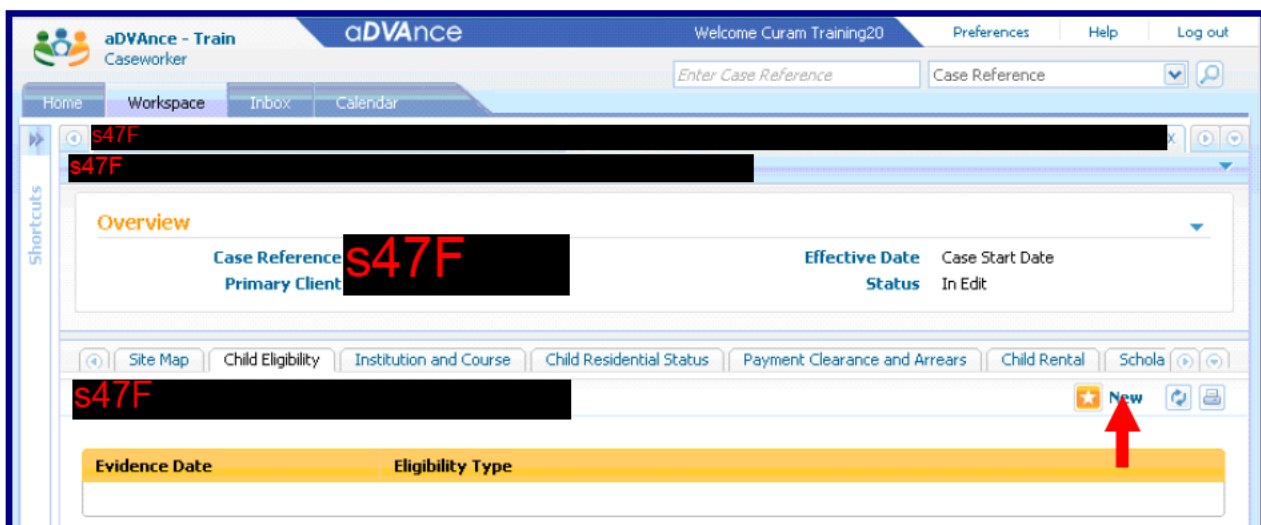
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The Evidence Tree displays with Evidence tabs across the screen.

The first tab is the Site Map which displays the standard EAS Evidence Groups and Evidence Types running down the page.



To commence recording the claim evidence click **Child Eligibility** in the Site Map or access the Child Eligibility tab.



Child Eligibility Evidence - click .

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The screenshot shows the 'Child Eligibility' form in the aDVance Train Caseworker interface. The form is partially filled with redacted information (s47F). A red arrow points to the 'Save' button.

Overview

Case Reference	s47F	Effective Date	Case Start Date
Primary Client	s47F	Status	In Edit

Eligibility Type

Eligibility Type	s47F	Eligibility Date of Event	s47F
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TFN Status

TFN Status	s47F
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Other financial support

Full Time Employment *	s47F	Date of Event *	s47F
In Receipt of Conflicting Government Benefit *	s47F	Date of Event *	s47F

Special Eligibility - Vulnerable

Confirm parent/step parent has Vietnam service
SQP has assessed the student applicant

Special Eligibility - ONCOSP

Confirm a parent had Operational Service
Confirm the parent with Operational Service is deceased
Confirm the student is not in the care of a surviving parent

Special Eligibility Date of Event

Special Eligibility Date Of Event	s47F
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Comments

s47F

Complete the New Child Eligibility Evidence Details and click

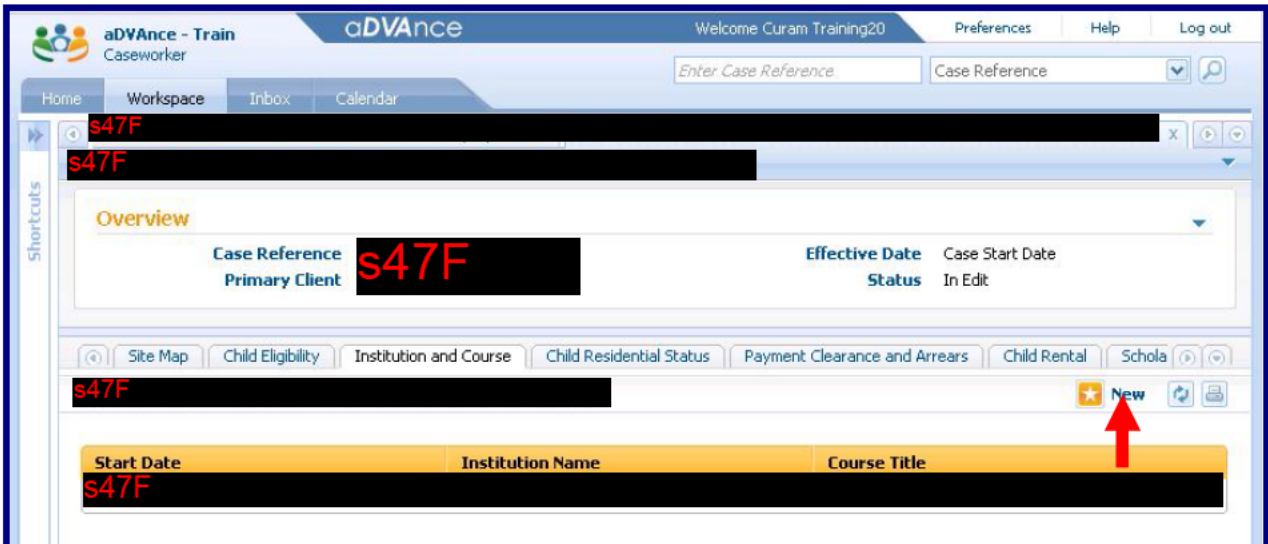



The screenshot shows the 'Evidence Date' and 'Eligibility Type' fields in the aDVance Train Caseworker interface. The 'Evidence Date' field is filled with s47F.

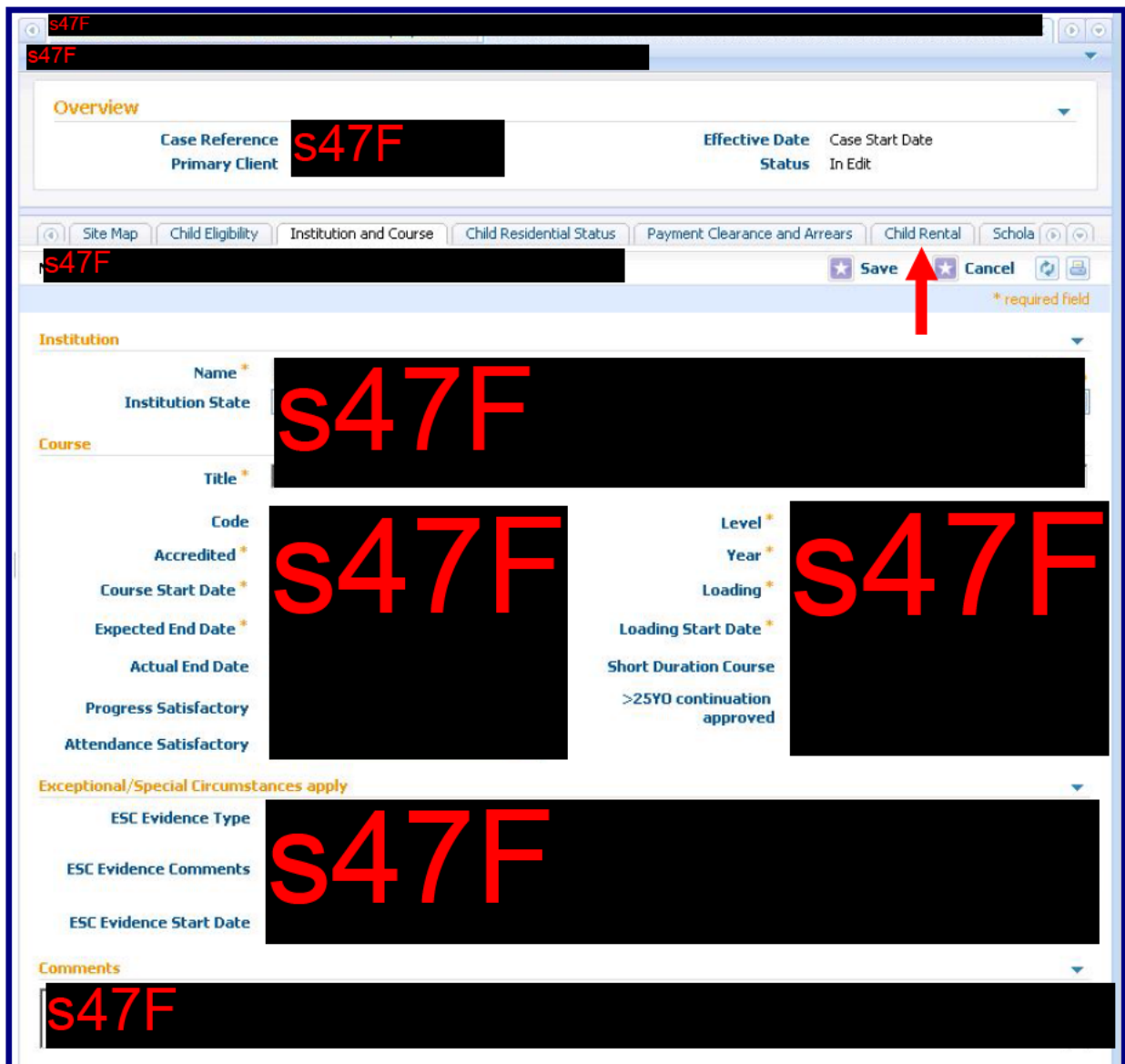
Evidence Date	Eligibility Type
s47F	


To continue recording the evidence return to the Site Map tab and click **Institution and Course** or access the Institution and Course tab.

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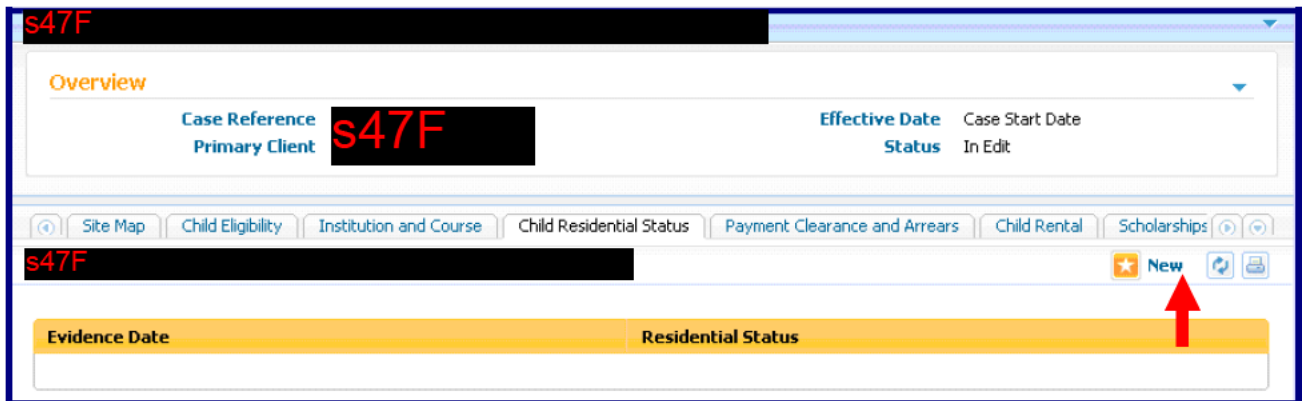
Institution and Course Evidence - click .




Record the Institution and Course Evidence and click .

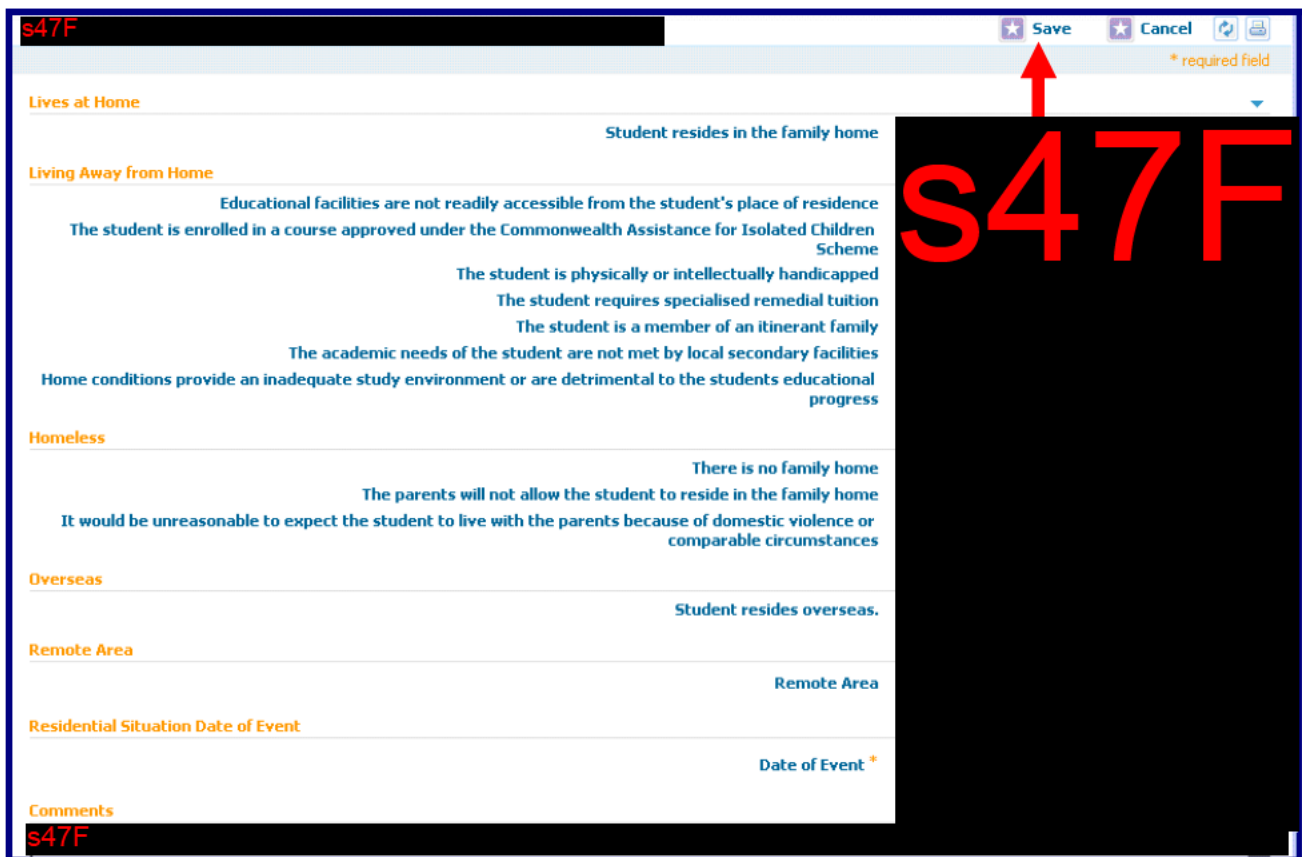
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Return to the Site Map tab and click **Child Residential Status** or access the Child Residential Status tab.



The screenshot shows the 'Child Residential Status' tab selected in the navigation menu. The 'New' button, represented by a star icon, is highlighted with a red arrow. The interface includes a header with 'Case Reference s47F' and 'Primary Client s47F'. Below the navigation menu, there is a table with columns for 'Evidence Date' and 'Residential Status'.

Child Residential Status Evidence - click .

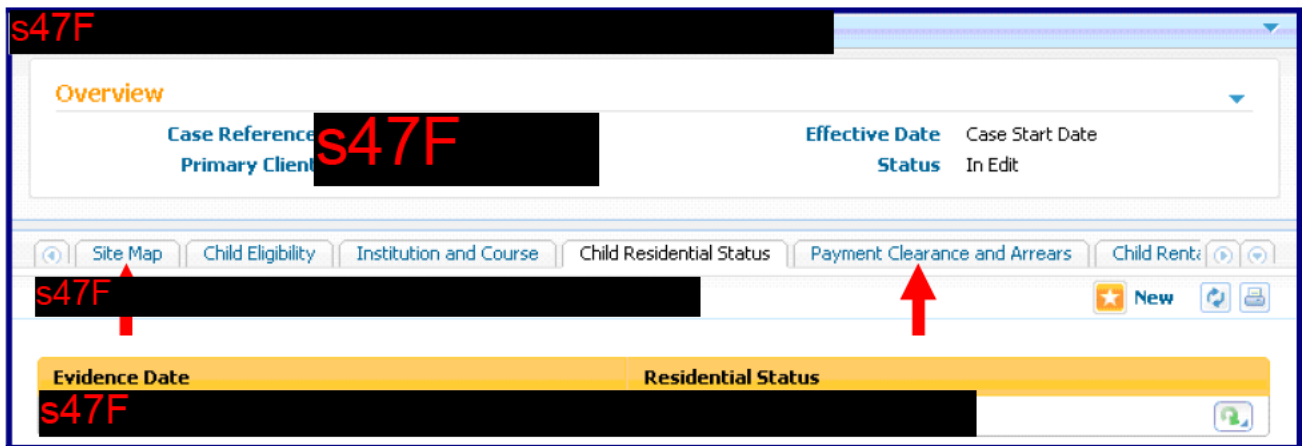


The screenshot displays the 'New Child Residential Status Evidence Details' page. The 'Save' button is highlighted with a red arrow. The page contains several sections for selecting residential status evidence, including 'Lives at Home', 'Living Away from Home', 'Homeless', 'Overseas', 'Remote Area', and 'Residential Situation Date of Event'. A large red watermark 's47F' is overlaid on the right side of the page.

Complete the New Child Residential Status Evidence Details page as per standard procedures and click .

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The Child Residential Status Evidence has been saved.



s47F

Overview

Case Reference s47F Effective Date Case Start Date
Primary Client s47F Status In Edit

Site Map Child Eligibility Institution and Course Child Residential Status **Payment Clearance and Arrears** Child Rent:

s47F New

Evidence Date	Residential Status
s47F	


Return to the Site Map tab and click **Payment Clearance and Arrears** or directly access the Payment Clearance and Arrears tab.



s47F

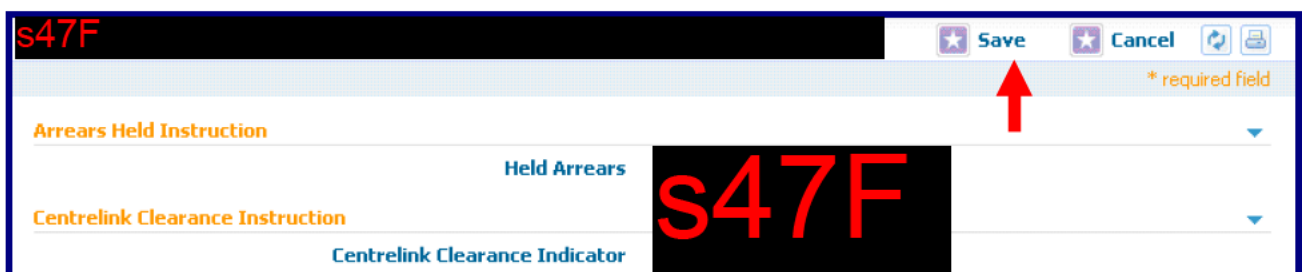
Held Arrears	Centrelink Clearance Indicator
s47F	

Payment Clearance & Arrears page – Arrears are automatically Held.

To change the Centrelink Clearance Indicator to YES click  the Action icon located on the right hand side.



The Action icon displays 2 options - click Edit.




s47F Save Cancel

* required field

Arrears Held Instruction Held Arrears s47F

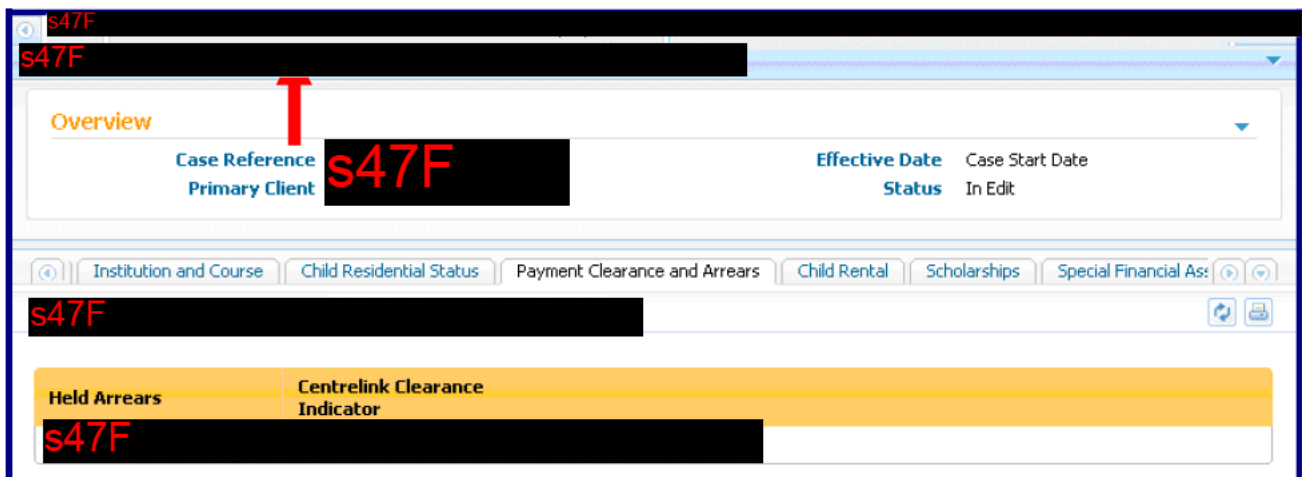
Centrelink Clearance Instruction Centrelink Clearance Indicator s47F

Activate the Centrelink Clearance Indicator checkbox & click .

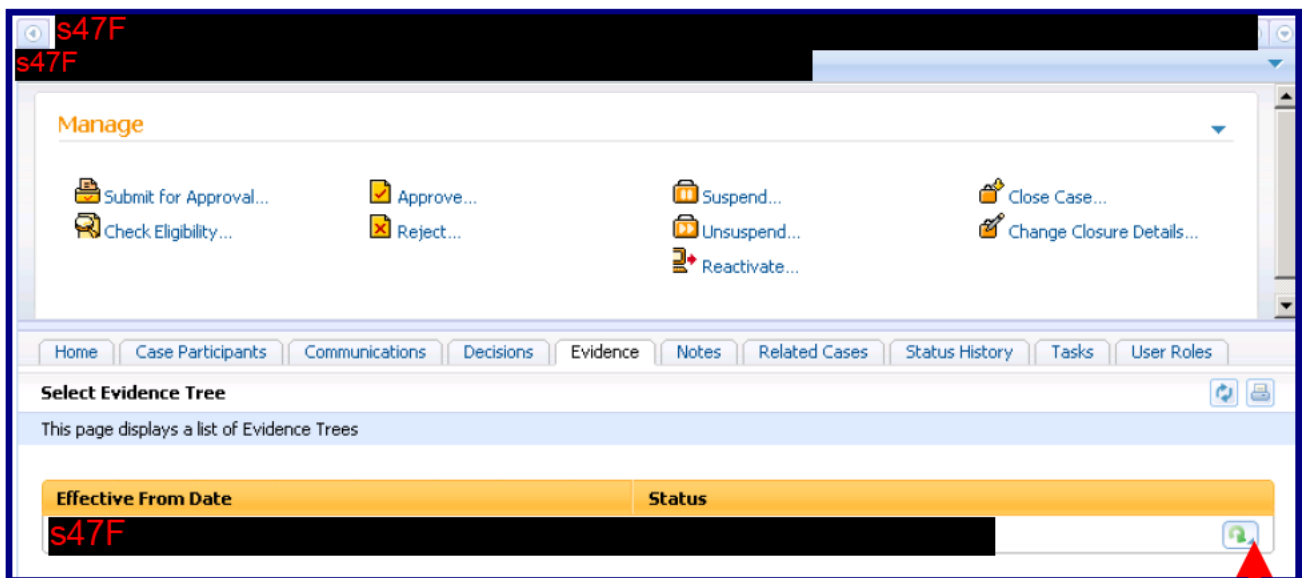
Depending on the circumstances of the claim – access and data collect any other evidence in the same manner (Child Rental, Scholarships, Special Financial Assistance etc).

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Note: these prints are for a different case – they will be updated.




Once all evidence is recorded click the Education Assistance tab.



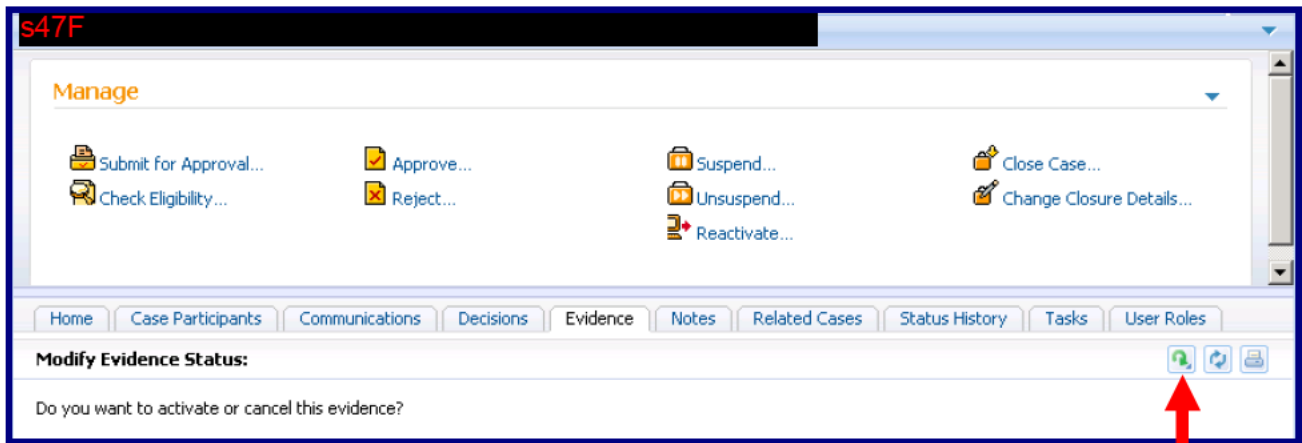
The EAS Claim is now ready to be completed.


Activate the Evidence

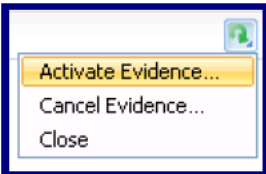
Click  the Action icon alongside the evidence tree.

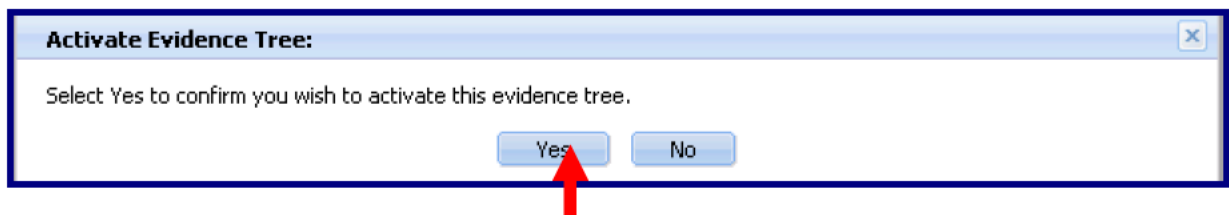
The Action icon displays 2 options  - click Change Status.

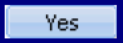
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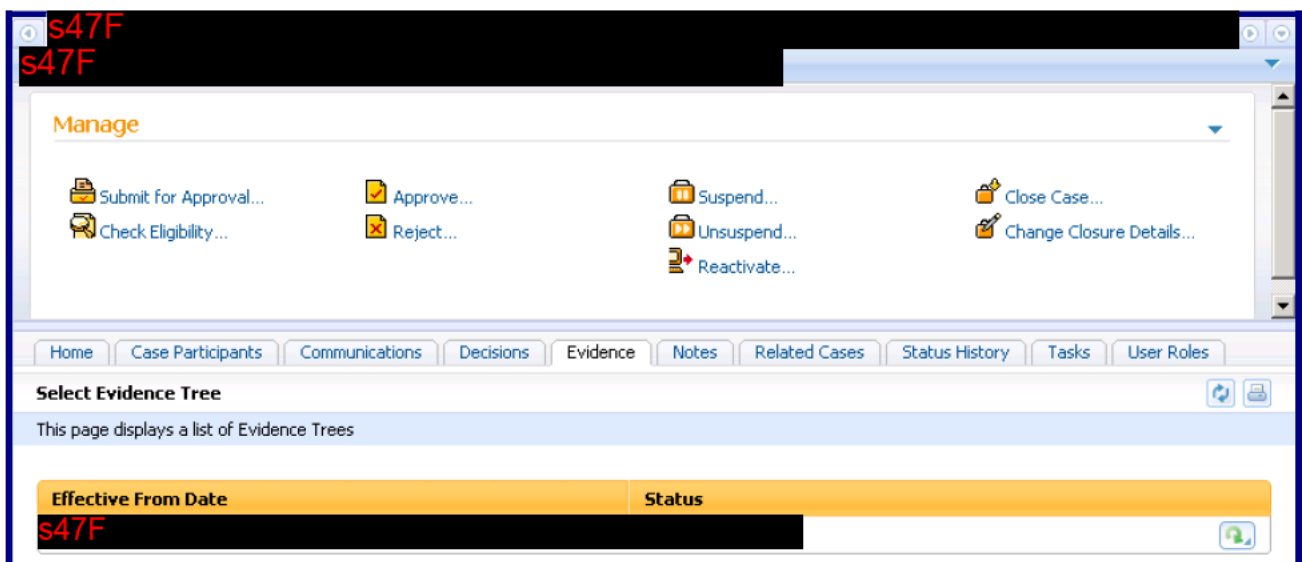


Modify Evidence Status - click  the Action icon.

The Action icon displays 3 options  - click Activate Evidence



Click  to confirm your desire to activate the evidence.



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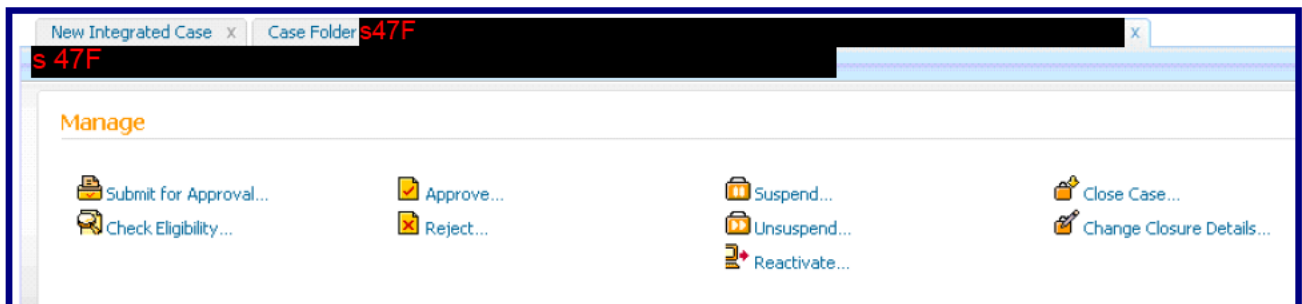
Assign Case Supervisor:

Before submitting the case for approval experienced EAS officers need to assign themselves as the Case Supervisor.




From the EAS Product Delivery Case tab structure access the User Roles tab.


Click the New Supervisor link – search for yourself and Save.

Product Delivery Case – Manage panel:



The MANAGE panel is unchanged.

  and  are unchanged. Submit the case for Approval and continue as per current processing.

Note: Once finished with the EAS case close any unwanted tabs by using the  on the right hand side of the tab.



Further Information:

For further information access the aDVance Version 6 – Reference Guides section of the aDVance Training sharepoint site:

<http://dvashare/BusinessUnits/Support/RCSS/BSA/aDVance/default.aspx>

This section of the aDVance Training sharepoint site contains a variety of aDVance Version 6 Reference Guides.