

First Contact Service Offer (FCSO) 106-03010000

Background

This document outlines the purpose and use of the First Contact Service Offer (FCSO) online tool.

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Application of FCSO tool

The FCSO guides the screening process when a customer first contacts the Department of Human Services. One focus is on identifying the customer's readiness, capability and capacity to look for and accept work. This topic explains when it is appropriate to run FCSO during the initial contact with a customer and important issues to consider. It contains separate procedures that explain how to run FCSO.

Staff may need to run FCSO when customers enquire about payments and services. These include Age Pension, Sickness Allowance, ABSTUDY, Austudy, Carer Payment, Carer Allowance, Widow Allowance, Pension Bonus Scheme, Youth Allowance (student) and Special Benefit as well as Commonwealth Seniors Health Card, Low Income Health Care Card, Foster Child Health Care Card and Ex-Carer Allowance (Child) Health Care Card.

Features of FCSO

The application guides the Service Officer through a set of questions. Once these questions are finalised, customers claiming one of the following payments:

- Newstart Allowance (NSA) - including incapacitated
- Youth Allowance (YA) (job seeker) - including incapacitated
- Parenting Payment (PP) (single and partnered)
- Disability Support Pension (DSP)
- Carer Payment (CP) (child)
- Carer Allowance (CA) (child)
- Carer Payment (CP) (adult)
- Carer Allowance (CA) (adult)
- Carers Streamlined Transfer - Child to Adult

will have a set of streaming rules applied to assist the Service Officer in determining the most appropriate participation pathway. **Note:** employment assistance for carers is voluntary.

These streaming rules:

- use flags to initiate an Employment Services Assessment (ESAt) or a Job Capacity Assessment (JCA) where a current and valid assessment of the customer's work capacity is not available.
- identify suitability for Department Employment programs for NSA/YA job seekers and Parenting Payment job seekers
- identify customers eligible for Skills for Education and Employment (SEE) through the questions in the Job Seeker Classification Instrument (JSCI). This program helps to improve job seekers' English language, literacy and numeracy skills to assist them in securing sustainable employment or to participate in further education and training
- identify Unreasonable To Live At Home (UTLAH) job seekers claiming YA.
- Identify if the job seeker is in a Remote Jobs and Communities Program (RICP) region.

Combined claims and pre-populated information

FCSO will allow for combined claims from members of a couple to be offered within one workflow. This will result in one joint claim being issued for both the customer and partner to complete. The customer's and partner's eligibility can then be assessed from this single claim.

The following customised claim forms will include this option when a customer and/or partner elect to claim the same entitlement on the same form:

- Age Pension (excluding customers claiming Age Pension with Pension Bonus Scheme)
- Commonwealth Seniors Health Card (CSHC)
- Low Income Health Care Card (LIC)

In addition to this, the following claims will pre-populate customer, and in some cases, partner information already held on the record:

- Age Pension (excluding customers claiming Age pension with Pension Bonus Scheme)
- Commonwealth Seniors Health Card (CSHC)
- Low Income Health Care Card (LIC)
- Foster Child Health Care Card (FST), and
- Ex-Carer Allowance (Child) Health Care Card (EHC)

Note: Person Permitted to Enquire (PPE) rules for Age Pension, CSHC and LIC as follows:

- If both customer and partner PPE is Yes, pre-population of both customer and partner details will be included.
- If customer's PPE is No for partner to enquire, pre-population of both customer and partner details will be included.
- If partner's PPE is No for the customer to enquire, pre-population of partner details will not be included, nor will the partner's income and asset details be displayed.
- If customer has advised a new or different partner in FCSO, and new partner has not been linked, no partner pre-population will occur.
- If customer is not partnered, will pre-populate customer details only.

Customers with a temporary incapacity

FCSO is also run for customers with a temporary incapacity (less than two years) including those who have a job to return to. Customers with ongoing employment who have a temporary incapacity will have a Sickness Allowance (SA) service offer generated. They may volunteer to register for employment services.

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Registration for Job Services Australia services using FCSO

Job seekers are referred to a Job Services Australia provider as a result of FCSO. These providers offer eligible job seekers access to Stream Services matched to their needs and skills.

Non customers

FCSO is used for customers aged between 15-21 years who are not claiming income support but who wish to be registered for full access to services from Employment Services Provider.

Customers outside this age group who are not claiming income support but who wish to be registered for services should be referred to a provider for registration. However, it may be appropriate for them to be registered by the Department of Human Services.

Pensioner Education Supplement (PES) customers

FCSO will automatically identify customers studying fulltime or part-time who could be eligible for Pensioner Education Supplement (PES). FCSO will indicate a claim needs to be issued for Pensioner Education Supplement (SY004) or a claim for ABSTUDY Pensioner Education Supplement - Form C (SY020) if the customer has identified as Aboriginal or Torres Strait Islander. Customers who receive some types of Department of Veterans' Affairs (DVA) payments will have specific messaging displayed and a link to qualifications for PES **before** a claim for Pensioner Education Supplement or ABSTUDY Pensioner Education Supplement is issued to the customer in some circumstances.

Students ceasing studies

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If a YA (student) cease full-time study they must notify the Department of Human Services and register as a job seeker within 14 days. Students can advise the department 28 days prior to their Student End Date (SED) of their intention to cease studies. Failure to notify cessation of study within 14 days after SED will result in cancellation of YA from Study End Date plus one day. Payment of YA (job seeker) may only commence from the date the department was contacted and the First Contact Service Offer (FCSO) or transfer has been initiated. A debt may be generated for students who fail to notify cessation of studies. There is no change to policy or process for customers advising an intention to study.

Minimum School Leaving Age

FCSO is unable to identify that the customer is under the minimum school leaving age for their State or Territory. In these circumstances, the customer may test their eligibility for Special Benefit (SpB) where the Service Offer will need to be manually adjusted.

CDEP wages participants

Community Development Employment Projects (CDEP) wages participants who exit CDEP wages and apply for NSA, YA or PP are required to have FCSO run. All referrals to be made at the first contact will be identified and the Service Officer will need to book the appropriate appointments. These may include appointments with a Senior Service Officer (SSO) or an Assessor.

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PP without participation requirements

If a Parenting Payment (PP) customer who is not subject to participation requirements declines to register for employment services, the claim will be continued using the Staff Assisted Claim (SAC) application. If the customer chooses to later be referred to a provider, a Job Seeker Classification Instrument (JSCI) is required for the customer and can be accessed via the standalone Looking for Work workflow. Customers who are claiming PP who have no participation requirements should be offered the first available provider appointment.

Activity tested customers

Most NSA and YA job seekers, including NSA and YA principal carers, will be identified during the Online Claim Participation interview or the FCSO process as requiring an appointment with a provider, this process is called RapidConnect. However, some job seekers may have their online claim finalised by the Jobseeker Claims Network prior to their provider appointment. These job seekers are still required to attend a RapidConnect appointment.

A provider appointment is not required if an activity tested customer is re-registering within an allowable break in registration period.

If the customer is re-registering outside the allowable break but within 12 months of being on payment, the job seeker is linked to the same provider (providing they are still living in same local area) and an appointment needs to be booked. If a suitable appointment cannot be booked within two working days, or the next 14 days, the customer is exempt from RapidConnect.

Activity tested job seekers not subject to RapidConnect who are required to be connected with a provider, should be referred and have the initial appointment booked with the provider of their choice within two working days.

Customers who have been in receipt of NSA within the last 12 months and are re-applying for the same payment will be identified as eligible for a NSA abridged claim. **Note:** from 1 July 2012 customers must be 22 years of age and over to be eligible for NSA. If a customer was previously in receipt of NSA and is only 21 years of age, check their eligibility under the grandfathering provisions, otherwise they will have to claim YA job seeker. See Age qualification for Newstart Allowance/Youth Allowance (job seeker).

RapidConnect and payability

Customers claiming NSA or YA (job seekers) who are subject to RapidConnect requirements have 14 days from the date that they are advised of their requirement to attend an initial provider appointment and lodge their claim. The day FCSO is run and completed is counted as day zero,

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with day one being the following day. Failure to attend the provider appointment within 14 days can impact on the date the customer is entitled to receive payment.

Activity tested job seeker is exempt from the RapidConnect process

Circumstances could include:

- medical reasons
- where a YA job seeker is assessed as eligible for referral to a youth program such as Youth Connections or Skills for Education and Employment (SEE)
- problems with access to a provider appointment because of location or appointment availability
- customers who are in crisis or have caring responsibilities.

In the following circumstances a customer may be automatically exempt from RapidConnect but are still required to be connected to a provider, usually within two days:

- mature age 55+ job seekers who indicate they are already meeting their Activity Test requirements with activities that may include paid work, self-employment and voluntary work of at least 30 hours per fortnight
- principal carers and people with a partial capacity to work who indicate they are already meeting their Activity Test requirements with activities that may include suitable study, undertaking paid work or self-employment of at least 30 hours per fortnight, can voluntarily be connected to a provider with a full JSCI or be registered at a minimum of No Stream Services Referral Required (NSSRR) No RJCP Referral Requirement (NRRR). **Note:** if the customer has been previously connected to a provider or has an active registration, the customer is unable to be registered as NSSRR.
- job seekers whose liquid assets exceed the threshold (i.e. likely to serve a Liquid Assets Waiting Period).

Some customers may need to be manually exempted from the RapidConnect process if their circumstances change, such as if they have already attended a provider appointment within 14 days of their FCSO being run or notification that they have attended the appointment has not been transferred successfully. See [RapidConnect processes](#) for details.

Customers claiming Age Pension

Customers with a Centrelink record will be sent the appropriate claim form to enable them to claim Age Pension. The system will automatically send out the required claim form. If a customer should contact wishing to claim Age Pension, running FCSO will send out the correct form. Where both members of a couple wish to claim payment FCSO should be run for both.

A customer current on most income support payments will be sent the Transfer to Age Pension (SA383) 63 days before they turn age pension age. These customers also will have the option of completing their [transfer to Age Pension online](#). FCSO will recommend that such a customer complete the SA383 or complete the simpler Transfer to Age Pension online. **Note:** for an [identified Indigenous customer](#) transferring to Age Pension no forms are required.

There are three claim forms that may be appropriate for Age Pension:

- for customers not claiming Pension Bonus Scheme or not registered members of the Pension Bonus Scheme, Claim for Age Pension (SA412) is issued by FCSO. This form has been designed for both customer and partner to claim Age Pension on the one form if they choose, but may wish to provide their details individually for privacy reasons and complete separate SA412s.

- claim for Age Pension and Pension Bonus (SA002), this is included in the claim pack (SA350) All PBS registered customers must use this claim pack to claim Age Pension and Pension Bonus. Both customer and partner can claim at the same time using the one form, but may wish to provide their details individually for privacy reasons and complete separate SA002s.
- customers able to lodge their claim online will be offered this option during FCSO. **Note:** customers transferring to Age Pension also have the option of claiming online.

If the contact is before the date of qualification, the customer should be advised to lodge a claim before qualification under the early claim provisions or contact the Department of Human Services on the date they become qualified.

Process to finalise claims after FCSO

On finalisation of the FCSO interview, customers will be offered a range of claiming options. Customers who intend to lodge a claim for NSA, YA (job seeker) and PP will be required to lodge a claim via the Staff Assisted Claim (SAC) process. These customers have their SAC interview run once the FCSO component is completed. At the completion of SAC staff will either be able to finalise the claim or request further information prior to completing.

Where the customer is unable to continue through to the SAC interview, a new claim finalisation interview will be booked and the customer will be advised of their rights and obligations regarding the interview.

For NSA, YA (job seeker) and those PP recipients who are subject to participation requirements and have an appointment booked which is outside 14 days of the customer's initial contact, a Preliminary Claim Form (SU550) will be produced automatically by FCSO and will be sent to the customer. A Preliminary Claim must be lodged by the customer in this situation.

It is important at the initial interview that the customer is told they will be required to attend a participation interview (incorporating claim finalisation) with the Department of Human Services.

Customers claiming who do not use the SAC process

These customers will be issued with claim forms that they must complete and return for their claim to be assessed. Customers must return their claim forms within 14 days of the CCD. The exception to this is Commonwealth Seniors Health Card claims that have been issued prior to the customer turning Age Pension age. These should not be lodged until the customer has turned Age Pension age. Once a customer has lodged their claim form they will be contacted by an experienced processing staff member by phone or mail within 14 days to discuss or advise the progress of their claim.

Customers claiming Carer Payment (CP) and/or Carer Allowance (CA)

These customers must return their forms within 14 days of the Claim Contact Date (CCD). If the customer cannot return the medical forms or other supporting documentation within 14 days they must return their **claim form within 14 days**. The medical forms or other supporting documentation must then be returned as soon as possible so that the claim can be finalised.

Customers claiming Age Pension, Commonwealth Seniors Health Card, Low Income Health Care Card, Foster Child Health Care Card or Ex-Carer Allowance (Child) Health Care Card will also be offered the option to lodge an online claim. If the customer chooses to claim online they will not be issued with a paper claim form to complete. **Note:** for partnered customers each member of the couple must complete a separate claim if claiming online.

Interpreter service

To communicate with customers who have limited or no use of the English language, or who are deaf/hearing impaired, the use of the [interpreter services](#) may be required.

The [Resources](#) page contains links to online forms on the Human Services Website and a link to Mapstat.

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[Opening the First Contact Service Offer application](#)

[Running the First Contact Service Offer application](#)

[First Contact Service Offer screens and functions](#)

Related links

[Determining when a Job Capacity Assessment \(JCA\) is required](#)

[Determining when an Employment Services Assessment \(ESAt\) is required](#)

[Initial contact by a customer who is ill, injured or has a disability](#)

[Eligibility to access employment assistance through Job Services Australia](#)

[Unemployment due to a voluntary act or misconduct](#)

[Activity Test requirements for Youth Allowance \(job seeker\) customers under 22 years of age who have not completed Year 12 or attained an equivalent qualification](#)

Process Summary

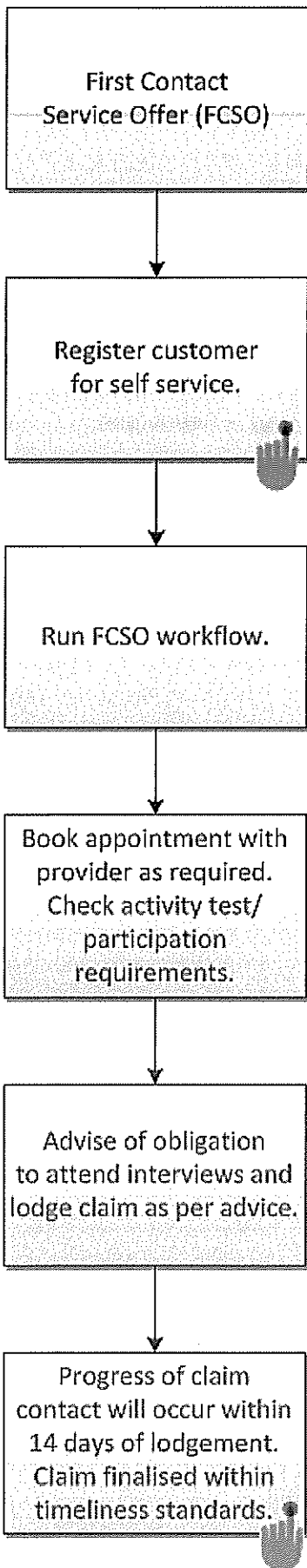
This page provides information on the process of running the First Contact Service Offer.

Flowchart

First Contact Service Officer (FCSO)

This image provides a summary of First Contact Service Offer (FCSO).

Note: a text based version of this process is located [here](#).



Process

This page contains information showing the different contact options that should be taken into account when processing a customer's enquiry using the First Contact Service Offer (FCSO). It provides information via payment type and/or services.

FCSO

First Contact Service Offer (FCSO) by payment type and/or service

This table describes the process for actioning the First Contact Service Offer across payment types.

Item	Description	Role/Authority
1	<p>Newstart Allowance (NSA)/Youth Allowance (YA) + <u>Read more ...</u></p> <ul style="list-style-type: none"> • First Contact Service Offer (FCSO) question set is completed. • Streaming rules applied to determine the appropriate job readiness pathway. • Connection to Job Services Australia completed and appointment booked with provider within two working days where required. • Connection to <u>Remote Jobs and Communities Program (RJCP) provider</u>, where RJCP is identified. <p>s 47E(d)</p>	See Action
	<p>Under minimum school leaving age</p> <ul style="list-style-type: none"> • FCSO is unable to identify that the customer is under the <u>minimum school leaving age</u> for their State or Territory and should test their eligibility for Special Benefit (SpB). The Service Officer will need to manually adjust claim type if the customer is below the minimum school leaving age. <p>s 47E(d)</p>	

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Activity tested customers

- Most NSA and YA job seekers, including NSA and YA principal carers, will be identified during the FCSO process as requiring an appointment with a provider before their claim for income support is finalised.
- The Finalisation appointment, which includes income support, generally will be booked after their scheduled provider appointment. This process is called RapidConnect.
- Customers claiming NSA or YA (job seekers) who are subject to RapidConnect requirements have 14 days from the date that they are advised of their requirement to attend an initial provider appointment and lodge their claim.
- The day FCSO is run and completed is counted as day zero, with day one being the following day. Failure to attend the provider appointment within 14 days can impact on the date the customer is entitled to receive payment.

Customer has participation requirements

- For NSA, YA (job seeker) and those PP recipients who are subject to participation requirements and have an appointment booked which is outside 14 days of the customer's initial contact.
- A Preliminary Claim Form (SU550) will be produced automatically by FCSO and will be sent to the customer. A Preliminary Claim must be lodged by the customer in this situation.

Principal carers or customers with partial capacity to work

- Principal carers or customers who are assessed as having a partial capacity to work who are already meeting the Activity Test are not required to be connected to an Employment Services Provider:
- Register the customer for No Stream Services Referral Required (NSSRR) if they choose not to volunteer for employment services.
- If the customer volunteers to be referred to Job Services Australia, then they should be registered as Fully eligible participate (FEP).
- Ensure the activity is verified at the claim finalisation interview and the appropriate activity code is recorded on the Activity and Exemption Summary (**AEX**) screen. For more information, see Activity Test/participation requirements for principal carers.


Upon completion of SAC interview



- Upon completion of the SAC interview, advise of the verification documents they are required to lodge at the local office.
- Advise customer of the forms/modules and verification documents required.

Registration for job services is available through FCSO

- Job seekers are referred to a Job Services Australia provider as a result of FCSO. These providers offer eligible job seekers access to Stream Services matched to their needs and skills

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 Employment Pathway Plan (EPP) completed if customer has not already had one negotiated and signed.

  Verification of documents or verbal information.

- Finalise claim.
- Book Employment Service Assessment (ESAt) appointment where triggered.

 Advise the customer of the following:

- Required documents
- Specific walk-in arrangements, or book an appointment at the preferred service centre.

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Parenting Payment (PP) + [Read more ...](#)

See Action

- First Contact Service Offer (FCSO) question set completed (including active participation messages).
- Job Seeker Registration, Job Seeker Classification Instrument (JSCI) and referral to provider offer.

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Principal carers already meeting participation requirements

- When meeting participation requirements, the customer is not required to be connected to an Employment Services Provider. If they choose not to volunteer for referral to Job Services Australia, register the customer for No Stream Services Referral Required (NSSRR).
- If the customer volunteers to be referred to Job Services Australia, then they should be registered as FEP. **Note:** if the customer has been previously connected to a provider or has an active registration they are unable to be registered as NSSRR.
- If the customer volunteers to be referred to RJCP then they should be registered as RFE. **Note:** if the customer has been previously connected to a provider or has an active registration they are unable to be registered as NRRR - No RJCP Referral Required.
- Ensure the activity is verified at the claim finalisation interview and the appropriate activity code is recorded on the Activity and Exemption Summary (**AEX**) screen. For more information, see Activity Test/participation requirements for principal carers.

Principal carers without participation requirements

- When the customer without participation requirements chooses not to volunteer for referral to Job Services Australia/RJCP :
- if customer wants to access JETCCFA, register the customer for No Stream Services Referral Required (NSSRR)
- if customer volunteers to be referred to Job Services Australia, then they should be registered as FEP.

If customer has participation requirements or offer of assistance is accepted

- refer to Job Services Australia/RJCP
- continued with the Staff Assisted Claim (SAC) application
- advise customer of the forms/modules and verification documents required at the finalisation appointment in the local Service Centre advised as per Mapstat details.

Parenting Payment Single (PPS) customers who may be eligible for Pensioner Education Supplement (PES)

- FCSO will identify customers who could be eligible for PES and will indicate a claim needs to be issued for Pensioner Education Supplement (SY004) or a claim for ABSTUDY Pensioner Education Supplement - Form C (SY010) if the customer has identified as an Aboriginal or Torres Strait Islander.



Verify documents and finalise claim

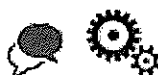
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- Complete and sign Employment Pathway Plan for customers with participation requirements.
- Book an ESAt appointment where triggered.

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- First Contact Service Offer (FCSO) question set completed.
- First contact question set information held.
- Issue a Claim for Disability Support Pension or Sickness Allowance (SA317(B)).

- FCSO will identify customers who could be eligible for PES and will indicate a claim needs to be issued for Pensioner Education Supplement (SY004) or a claim for ABSTUDY Pensioner Education Supplement - Form C (SY010) if the customer has identified as an Aboriginal or Torres Strait Islander.



Service Officer to finalise income support decision.

Note: this part of contact does not have to be completed face-to-face if all information is available.

4 **Sickness Allowance (SA) + Read more ...** See Action

FCSO is also run for customers with a temporary incapacity. Temporary incapacity (less than two years) includes those who have a job to return to.

Customers with ongoing employment who have a temporary incapacity will have a Sickness Allowance (SA) service offer generated. They may volunteer to register for employment services.

- First Contact Service Offer (FCSO) question set completed
- First contact question set information held
- Issue a Claim for Disability Support Pension or Sickness Allowance (SA317(B))
- FCSO finalised.



Service Officer to finalise income support decision.

Note: this part of contact does not have to be completed face-to-face if all information is available.

5 **Claim for Carer Payment (CP) and Carer Allowance (CA), claim for Carer Payment only, or claim for Carer Allowance only + Read more ...** See Action

- First Contact Service Offer (FCSO) question set completed.
- First contact question set information held.
- FCSO will determine the required customised or standard claim form, medical and other forms for the carer and care receiver(s) to complete depending on the customer's circumstances.
- For the carer, the forms will be either blank (for a new customer or those with no payment history) or customised (for a customer currently or previously in receipt of an income support payment) depending on the customer's

circumstances. Customised forms may be personalised and question dynamic.

- All current or previously linked records, such as previous care receivers, children, partner and nominees will be available to be selected as a potential care receiver to enable tailoring of customised forms and personalising of forms. Organisation links will not be displayed. All care receiver(s) who are not listed as a current or previously linked record will be issued standard forms.

For more information on forms issued by FCSO see:

- Initial contact by a customer claiming Carer Payment (CP), and/or
- Initial contact by a customer claiming Carer Allowance (CA)

Carer and Pensioner Education Supplement (PES)

FCSO will identify customers who could be eligible for PES and will indicate a claim needs to be issued for Pensioner Education Supplement (SY004) or a claim for ABSTUDY Pensioner Education Supplement - Form C (SY010) if the customer has identified as an Aboriginal or Torres Strait Islander.

Care receiver aged 16 or over

Advise the carer that a care receiver aged 16 or over may also be entitled to an income support payment. FCSO must be run separately for the customer who is a care receiver.



Advise the customer once their claim form has been lodged they will be contacted by an experienced processing staff member by phone or mail within 14 days to discuss or advise the progress of their claim.



Service Officer to finalise income support decision.

Note: this part of contact does not have to be completed face-to-face if all information is available.

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Age Pension [+ Read more ...](#)

See Action

- First Contact Service Offer (FCSO) question set completed.
- First contact question set information held.
- If the contact is before the date of qualification, the customer should be advised to lodge a claim before qualification under the early claim provisions or contact the Department of Human Services on the date they become qualified.

Issue forms

For customers who are registered in the Pension Bonus Scheme, issue Claim pack (SA350), this includes Claim for Age Pension and Pension Bonus (SA002) as well as the following:

- Information you need to know about your claim for Age Pension (Ci006)
- News for Seniors (RT010)
- Income and assets (SA415) **Note:** when the claim pack is being issued by FCSO an SA415 will be sent not the Income and assets (SA369)

- Details of Income Stream Product (SA330)
- Centrepay Deductions (SA325)
- Retirement Payment Rates Fact Sheet (CO030)

Customers not currently in receipt of an income support payment only claiming Age Pension will be issued with a pre-populated Claim for Age Pension (SA412). **Note:** this form has been designed for both customer and partner to claim Age Pension on the one form if they choose. If they wish to provide their details individually for privacy reasons, each form will contact partner questions and must be completed.

Transfer to Age Pension from another income support payment

Customers currently receiving most social security payments can be transferred to Age Pension without a full claim form when they reach age pension age. A Transfer to Age Pension (SA383) is automatically issued 63 days before the customer reaches age pension age; alternatively customers have the option of completing their transfer to Age Pension online. **Note:** from 1 July 2010 - for an identified Indigenous customer transferring to Age Pension no forms are required.

Note: pre-populated claim forms are only available to customers under specific conditions.

For full details of transfers, see Transfer to Age Pension.

FCSO will identify customers who could be eligible for PES and will indicate a claim needs to be issued for Pensioner Education Supplement (SY004) or a claim for ABSTUDY Pensioner Education Supplement - Form C (SY010) if the customer has identified as Aboriginal or Torres Strait Islander.

Members of a couple

FCSO will allow for combined claims for Age Pension from members of a couple to be offered within one workflow. This will result in one joint claim being issued for both the customer and partner to complete. The customer's and partner's eligibility can then be assessed from this single claim.



Advise the customer once their claim form has been lodged they will be contacted by an experienced processing staff member by phone or mail within 14 days to discuss or advise the progress of their claim.



-4064; Service Officer to finalise income support

decision. **Note:** this part of contact does not have to be completed face-to-face if all information is available.

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Commonwealth Seniors Health Card (CSHC), Low Income Health Care Card (LIC), Foster Child Health Care Card (FST), Ex-Carer Allowance (Child) Health Care Card (EHC) + Read more ...

See Action

- First Contact Service Offer (FCSO) question set completed.
- First contact question set information held.

Lodging claims online

- Customers claiming Commonwealth Seniors Health Card, Low Income Health Care Card, Foster Child Health Care Card or Ex-Carer Allowance (Child) Health Care Card will also be offered the option to lodge an online claim.

- If the customer chooses to claim online they will not be issued with a paper claim form to complete.
- For **partnered customers** each member of the couple must complete a separate claim if claiming online.

If issuing claims via FCSO

- FCSO will determine the required customised claim form, e.g. CSHC (SA443), LIC (SS487), FST (SS489) or EHC (SS490).
- The amount of information pre-populated into the customised form will depend on several factors such as any change in relationship advised via FCSO and the Partner Permitted to Enquiry (PPE) status for the customer and partner.
- Information you need to know about your claim for Commonwealth Seniors Health Card, Low Income Health Care Card, Foster Child Health Care Card, Ex-Carer Allowance (Child) Health Care Card (Ci010).

Members of a couple

- FCSO will allow for combined claims for CSHC, LIC, FST and EHC from members of a couple to be offered within one workflow. This will result in one joint claim being issued for both the customer and partner to complete.
- The customer's and partner's eligibility can then be assessed from this single claim.



Advise the customer once their claim form has been lodged they will be contacted by an experienced processing staff member by phone or mail within 14 days to discuss or advise the progress of their claim.



Service Officer to finalise assessment of claim. **Note:**

this part of contact does not have to be completed face-to-face if all information is available.

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Pensioner Education Supplement (PES) customers [+ Read more ...](#)

FCSO will automatically identify customers studying full-time or part-time who could be eligible for Pensioner Education Supplement (PES). FCSO will indicate a claim needs to be issued for Pensioner Education Supplement (SY004) or a claim for ABSTUDY Pensioner Education Supplement - Form C (SY020) if the customer has identified as an Aboriginal or Torres Strait Islander.

Customers who receive some types of Department of Veterans' Affairs (DVA) payments will have specific messaging displayed and a link to qualifications for PES before a claim for Pensioner Education Supplement or ABSTUDY Pensioner Education Supplement is issued to the customer in some circumstances.

9

Registration of non-customers for job services + Read more ...

FCSO is used for customers aged between 15-21 years who are not claiming income support but who wish to be registered for full access to services from Job Services Australia.

Customers outside this age group who are not claiming income support but who wish to be registered for services should be referred to a provider for registration. However, it may be appropriate for them to be registered by the Department of Human Services.

Resources

This page contains links to the Human Services Website and Mapstat. Links on this page may be unavailable to external audiences.

On this Page:

[Human Services Website link](#)

[Mapstat](#)

Human Services Website link

[Human Services Website](#)

Mapstat

The speed dial numbers for transferring calls to other queues are available on Mapstat. (Select the Nat Xfer Numbers link under 'Lists' on the Mapstat home page.) They can be viewed at [National Transfer Numbers](#).

Training & Support

This page contains training information. Links on this page may be unavailable to external audiences.

Training packages

The following training about this topic is available for staff in ESSentials:

- **CLK00400** - First Contact Service Offer

To access this training, go to the [Learning Portal](#) in ESSentials and search for the relevant course number in the **Search** field.

Note: ensure line manager approval has been provided before applying for any training through ESSentials.

Running the First Contact Service Offer (FCSO) application 106-03010020

Background

This document outlines running the First Contact Service Offer (FCSO) application when a customer makes their first contact with Department of Human Services.

An Operational Message has been created due to a change in the process where a customer is unable to use an online claim, staff in Service Centres and Remote Smart Centre will use the Assisted Customer Claim workflow to obtain a claim from the customer. [Click here to view the Operational Message.](#)

On this Page:

[FCSO screening process](#)

[Screening process system outcomes](#)

[Appointments, letters and forms](#)

['Office Use Questions Only' in FCSO](#)

[Related links](#)

FCSO screening process

The FCSO is a screening process conducted when a customer first contacts the department either at a Service Centre or a Smart Centre Call. It is to be run for all first contacts, including:

- Newstart Allowance (NSA), including incapacitated
- Youth Allowance (YA) (job seeker), including incapacitated
- Parenting Payment (PP) (single and partnered)
- Disability Support Pension (DSP)
- Carer Payment (CP) and/or Carer Allowance (CA) - for all new claims
- Carers Streamlined Transfer - Child to Adult
- Sickness Allowance (SA) - however for this payment, the Job Seeker Registration is not completed.
- Age Pension
- Commonwealth Seniors Health Card (CSHC)
- Low Income Health Care Card (LIC)
- Foster Child Health Care Card (FST)
- Ex-Carer Allowance (child) Health Care Card (EHC).

Screening process system outcomes

The screening process includes the following system outcomes:

- Gathers and confirms essential information about the customer, including personal details, contact information and relevant partner information.

- Where applicable, allow for combined concession card claims from members of a couple to be actionable within one workflow, resulting in one joint claim being issued for customer and partner to complete.
- Pre-populates customised claim forms with relevant information already recorded on the system. **Note:** Customised forms not available for all claims.
- Activates the data link with the Department of Immigration and Border Protection (DIBP) and, where applicable, populates the customer's visa, citizenship (in some cases) and movement information into the relevant screens. Where the information is not available directly from Department of Immigration and Border Protection or the customer's record, the relevant residence questions will be asked.
- Ensures the Customer's Contact Date is recorded.
- Completes a job seeker registration where applicable.
- Gathers relevant Job Seeker Classification Instrument (JSCI) responses and completes the JSCI.
- Gathers relevant risk indicators using streaming questions and rules.
- Generates a flag for job seekers identified as part of the RapidConnect target group.
- Identifies RapidConnect customers who have valid exemption reasons.
- Displays messages to prompt the CSO to encourage all job seekers to register with Job Services Australia.
- Issues the job seeker with their Job Seeker Identification Number (JSID).
- Identifies, via trigger questions, which documents and forms need to be issued to the customer.
- Documents for the customer where and when the interview is and what evidence and supplementary forms are required.
- Identifies any special circumstances requiring immediate assistance (e.g. Homelessness for under 18s, people in financial hardship) and refers to the appropriate specialist officer. **Note:** This is currently a manual process.
- Identifies customers studying full-time or part-time who may be eligible for Pensioner Education Supplement (PES).
- Identifies Aboriginal or Torres Strait Islander customers studying fulltime or part-time who may be eligible for ABSTUDY Pensioner Education Supplement (PES).

Appointments, letters and forms

The FCSO screening process:

- Facilitates the booking of appointments with the Employment Services Provider where this is required.
- Books an appointment for a participation interview (incorporating the new claim process) where required. If the interview is booked more than 14 days in advance, a 'Preliminary Claim Form' must also be issued to the customer.
- Generates Confirmation of Intention to Claim letter.
- Books specialist appointments as required.
- For Carer Allowance (CA) and Carer Payment (CP) claims, it will determine if the customer is eligible for customised and personalised forms.
- Issues CA and CP forms via email for customers who select the email option and are registered for Online Letters (OLL).

'Office Use Questions Only' in FCSO

CSOs **must not** change the default selection in the restricted/reduced work capacity of the 'Office Use Questions Only'. This includes situations where there is evidence that the customer has some type of restriction in their work capacity as assessed by a JCA, or has presented a medical certificate for a temporary incapacity exemption, or, when the customer is claiming DSP.

The [Resources](#) page contains a link to the Claim for Disability Support Pension or Sickness Allowance (SA317 (B)).

Related links

[First Contact Service Offer \(FCSO\)](#)

[First Contact Service Offer screens and functions](#)

[Issuing and processing the Preliminary Claim Form \(PCF\)](#)

[Eligibility for Skills for Education and Employment \(SEE\)](#)

[Initial contact by a customer who is ill, injured or has a disability](#)

Process Summary

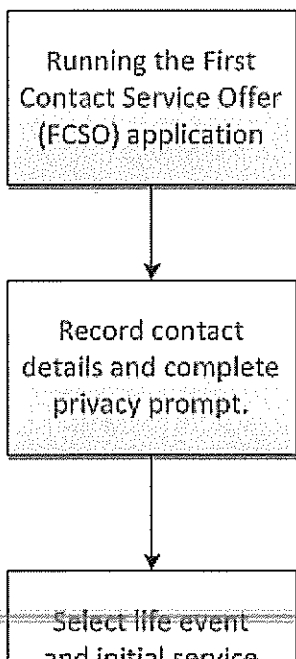
This page contains information on running the First Contact Service Offer (FCSO) application.

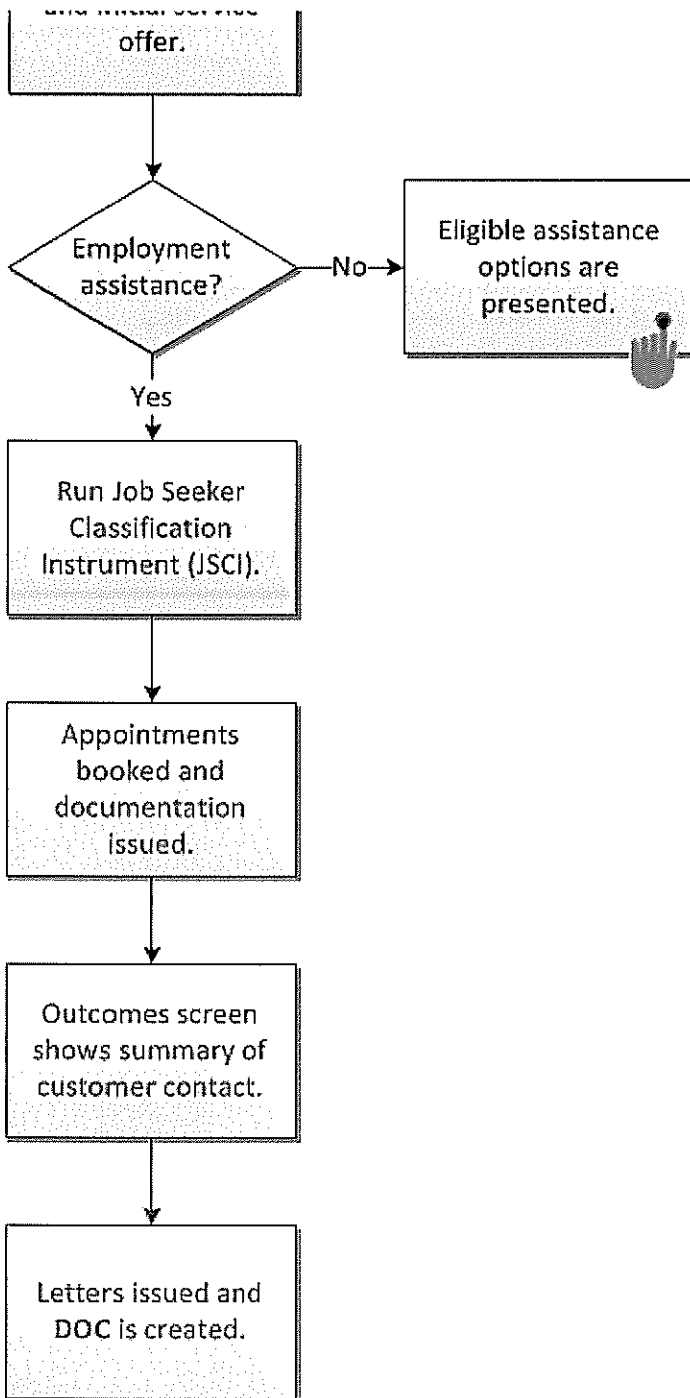
Flowchart

Running the FCSO application

This image provides a summary of how to run the First Contact Service Offer (FCSO) application.

Note: a text based version of this process is located [here](#).





Process

This page contains information about running First Contact Service Offer (FCSO).

On this Page:

[FSCO process](#)

[System information](#)

FSCO process

Running First Contact Service Offer (FCSO) for initial customer contact

This table describes the steps to complete FCSO when a customer makes contact for assistance from the Department of Human Services.

Step	Action
1	<p>Initial contact + Read more ...</p> <ul style="list-style-type: none"> • Customer contacts by phone or in person to ask about the availability of assistance from the Department of Human Services. • Search for the customer on the system. • When certain that the correct customer record has been located, access the First Contact Service Offer workflow and select Start New Workflow.
2	<p>No customer record + Read more ...</p> <ul style="list-style-type: none"> • If not in the customer's record, the Name Search (IN) screen will appear to enable a search for a record. Where the customer does not have a record and indexing is required, code 'FSC' in the Service Reason: field and 'ADD' in the Act: field. • If in the customer's record, the First Contact History Screen will appear. This 'display only' screen provides a summary of a customer's historical First Contact interviews and outcomes. A First Contact Workflow interview can be started or continue with an existing one. The system determines whether a workflow is to be 'started' or 'continued'. <p>When either 'start workflow' or 'continue workflow' is selected the system will check for any conflicting activities. If any activities exist, an 'error' or 'warning' screen will display and then the Activity List (AL) screen.</p> <p>For Carer Payment (CP) and Carer Allowance (CA) the First Contact History screen will identify if the customer has been automatically issued a Carers Streamlined Transfer child to adult form.</p> <p>If there are no conflicting activities, the First Contact Details screen will appear. Use this screen to record information about how and when the customer contacted the department. When completed, select 'Continue'. The Privacy Prompt screen will appear.</p>
3	<p>Privacy Prompt + Read more ...</p> <p>The Privacy Prompt screen displays information that must be read to the customer. Request the customer's consent to continue beyond this screen.</p> <p>If the customer does not consent to continue, choose 'continue' to be navigated direct to the First Contact Outcomes screen.</p> <p>If the customer consents to continue, select 'Continue' to be navigated to the Customer Summary screen. All fields on this screen will be pre-populated with the data currently on the customer's record. This screen is used to confirm details on how the Department of Human Services can get in touch with the customer, including address and phone details. Current information can be edited or new information inserted by clicking on the relevant hyperlink.</p> <ul style="list-style-type: none"> • If the customer and/or partner's PPE is coded as 'N', update to 'Y' if requested by the customer. The update will be immediately applied to the record by the FCSO workflow. • The names of any current correspondence and payment nominee will display. If the arrangement is voluntary and the customer chooses to cease the arrangement however, the Nominee Action script/ Nominee Action Guided Procedure will need to be run after FCSO is completed.

- When a third party requests claim forms for Carer service offers on behalf of the customer, FCSO will allow standard claims forms to be issued to the customer. If the CSO determines it is not appropriate to send standard forms, an option to record a CCD only will be available and the CSO should request the customer contact themselves ASAP.

Select '**Continue**' to go to the **More Customer Information** screen.

4

The 'More Customer Information' screen + [Read more ...](#)

This screen holds additional customer questions, the responses to which assists in determining the most appropriate service offer. Select '**Continue**' to go to the **Life Events** screen.

If possible, residence information will be obtained from the customer's Centrelink and the Department of Immigration and Border Protection records. The customer will be asked the necessary questions when this information is not available.

5

The Life Events screen + [Read more ...](#)

This screen presents a number of 'life events' relevant to the current circumstances of the customer.

Select the appropriate life event(s) for the customer:

- at least one life event must be selected.
- to select a particular life event, click on the plus ('+') icon. This will display sub life events which may be selected, there is no restriction on the number of sub life events that can be selected. Where a number of life events are selected a hierarchy will be applied.
- if a crisis event is selected, the option of referring immediately to a social worker is given.

Select '**Continue**' to go to the **Initial Service Offer** screen.

6

The Initial Service Offer screen + [Read more ...](#)

This screen will display which offer(s) a customer may be eligible for, together with some information text. A 'recommended' option will be automatically identified; but select the offer that best meets the customer's circumstances.

For Parenting Payment (PP), the **Parenting Payment Further Eligibility Assessment** must be completed before progressing with claim. See [Initial contact by customers claiming Parenting Payment \(PP\)](#).

Offer of DSP (non manifest) or Parenting Payment: the system will display static text which prompts the CSO to offer a referral to Job Services Australia, and requires a '**yes**' or '**no**' response from the customer. ^{s 47E(d)}

s 47E(d)

Offer of Newstart or Youth Allowance (job seeker): an alternative text will be displayed which prompts the CSO to explain to the customer they have been identified as being potentially eligible for employment services.

If the customer has agreed to, or is required to have, an Employment Services Provider referral, the Job seeker questionnaire will display after selecting '**Continue**'.

If the customer discloses a medical condition(s) during the Job Seeker Classification Interview (JSCI) part of the FCSO, [go to Step 7](#).

If a customer is to be offered a payment that does not require proceeding through the Job seeker questionnaire, the text presented will simply state the assistance they may be eligible for. This includes:

- Age Pension
- Sickness Allowance (SA)
- Youth Allowance (YA)
- ABSTUDY
- Disability Support Pension (DSP) (manifest)
- Austudy
- Carer Payment (CP)
- Carer Allowance (CA)
- Newstart Allowance (NSA)
- Special Benefit (SpB)
- Commonwealth Seniors Health Card (CSHC)
- Low Income Health Care Card (LIC)
- Foster Child Health Care Card (FST), and
- Ex-Carer Allowance (child) Health Care Card (EHC).

When '**continue**' is selected the screen flow is determined by the type of assistance offered.

The JSCI will also identify customers eligible for Skills for Education and Employment (SEE). If a referral cannot be made at the FCSO, record a **DOC**, with the keyword '**SEE**' which will flag it for follow up at the Staff Assisted Claim interview.

- **Offer of Youth Allowance (student) or Austudy:** these customers will be given the option of claiming online or being manually issued with a paper claim. Where they choose to claim online, the CSO will be navigated to the **First Contact Outcomes** screen. Where the paper claim option is chosen, the CSO will be navigated to the **Requested Documentation** screen.
- **Offer of Youth Allowance (under minimum school leaving age):** FCSO is unable to identify that the customer is under the minimum school leaving age. In these circumstances, the customer may test their eligibility for Special Benefit (SpB) where the Service Offer will need to be manually adjusted.
- **Offer of ABSTUDY:** these customers will be advised they can complete an ABSTUDY paper claim form. Alternatively, the customer may lodge their claim via the ABSTUDY Simplified Claiming Tool.
- **Offer of payment under New Apprenticeship conditions:** these customers can have their claim processed by continuing the Staff Assisted Claim (SAC) at this contact, or lodging an online or Paper claim.
- **Offer of Crisis payment:** this payment is offered in conjunction with another appropriate service offer. A prompt will be displayed to either continue with the First Contact workflow or select immediate referral to a social worker.
- **Offer of Carer Payment (CP) and/or Carer Allowance (CA):** Customised or standard claim forms are generated determined by the carer's and care receiver's circumstances. Carers in combined care or multiple care situations will receive multiple Medical Reports and Carer Payment Care Needs Assessment for a child under 16 years (SA394) forms for CP (child) claims, these may also be customised. For more information on forms issued, see the Detail section in First Contact Service Offer (FCSO). **Note:** advise the carer that a care receiver aged 16 or over may also be entitled to an Income Support Payment (ISP). FCSO must be run separately for the customer who is a care receiver.

- On the **Additional Forms and Modules** screen FCSO will display a list of persons the customer has links with, including children, previous care receivers, partner and nominees. The CSO has the option of selecting the current care receivers from this list. If selected, FCSO will then use the information from the care receiver's/customer's records to customise and personalise claim and medical forms. If the care receiver is new, additional questions will be asked within the workflow and standard forms will be issued.
- Customers will also be offered a voluntary referral for [employment assistance](#).
- **Offer of Sickness Allowance (SA):** If the life event 'employed - incapacity less than 2 years' is chosen, manually send the Claim for Disability Support Pension or Sickness Allowance (SA317 (B)). A link to the form can be found in the [Resources](#) page.
- **Offer of Age Pension:** Selecting the option 'Planning For or Needing Help in Retirement' will advise a paper claim or an online claim can be made. FCSO will issue the new claim pack or, if appropriate, issue a pre-populated Claim for Age Pension (SA412) or the new claim pack, if registered or claiming under Pension Bonus Scheme.
- **Offer of CSHC, LIC, FST or EHC:** A customised claim form will be issued with relevant customer and partner (if applicable) information pre-populated. The information which is pre-populated will depend on PPE rules for partnered customers; see [First Contact Service Offer](#). Customers claiming CSHC, LIC, FST or EHC will also be given the option of claiming online.
- **Partner Service Offer:** For Age Pension, CSHC and LIC, a partner service offer will be displayed if meeting certain conditions. Once the partner service offer is displayed, the claim form will include the partner claim questions within the form. If the partner service offer is selected within FCSO, a CCD and Partner **DOC** will also be generated on partner record.
- **No offer available:** Where no offer is generated, text will display to prompt the CSO to advise they are not eligible for any Centrelink services or payment and they should recontact if there is a change in circumstances.

Employment services only: CSO will be navigated to the Outcomes screen and displayed text will prompt the CSO to run the separate [Looking for Work workflow](#) for Employment Services Provider assistance.

Third party contact: Where the contact has been made by a third party, the service offers will be displayed but the CSO does not select a suitable option. The workflow will navigate direct to the **Outcomes** screen to finalise the interview.

Offer of Pensioner Education Supplement (PES): this payment can be offered in conjunction with another appropriate service offer or as a service offer on its own. A prompt will be displayed and will indicate a claim needs to be issued for Pensioner Education Supplement (SY004) or a claim for ABSTUDY Pensioner Education Supplement - Form C (SY010) if the customer has identified as Aboriginal or Torres Strait Islander.

7

Results screen and disclosure of medical condition [+ Read more ...](#)

When conducting a JSCI during the FCSO interview, customers may disclose an on-going medical condition(s) which may affect their ability to work.

Where this information has been disclosed, the system will create a [JSCI Initiated Employment Services Assessment \(ESAt\) flags](#).

Advise the customer:

- to provide medical evidence for assessment at their new claim finalisation interview,
- a JCA appointment may be booked for them at their finalisation interview and

- the JCA process will be explained and they will be provided with a factsheet at the finalisation interview.

A **DOC** must be written on the customer's record noting this advice has been provided to the customer.

Note: the default selection in the restricted/reduced work capacity of the 'Office Use Questions Only' **must not** be changed. This includes situations when there is evidence the customer has some type of restriction in their work capacity.

System information

Finalising First Contact Service Offer (FCSO)

This table describes the steps to finalise the first contact service offer.

Steps	Action
1	<p>The Book appointments screen + Read more ...</p> <p>This screen will list all the appointments required as a result of the First Contact Service Offer. The screen will be populated according to the individual requirements of the customer.</p>
2	<p>The Requested Documentation screen + Read more ...</p> <p>This screen is displayed for all payment Service Offers. It allows the CSO to both view and add/subtract modules and documents as required. It will not display for a service offer of Employment Services only, or where no service offer is made. Where no modules or documents are required, the screen will display the text: 'No documentation is required'. Modules and claim packages required may be generated automatically by the First Contact Service Offer workflow and/or manually. Manual selection can be made using the 'add document' twistie on the screen.</p>
3	<p>The First Contact Outcomes screen + Read more ...</p> <p>This screen is presented at the end of the FCSO workflow, or where the workflow has been completed or is being interrupted. It provides a summary of the outcomes obtained as a result of the contact with the customer (or third party). Proof of Identity (POI) required for the claim, and POI tier level will display based on information from the POI screen and the payment type being claimed.</p> <p>In certain circumstances it will provide the option of running the workflow on the customer's partner.</p>
4	<p>Letters produced by the FCSO process + Read more ...</p> <ul style="list-style-type: none"> • Confirmation of Intention to Claim - this is a Batch Laser Advice (BLA) sent to all customers with a service offer of NSA, YA, Parenting Payment (PP) single and partnered, DSP, CP and/or CA, Age Pension, SA, CSHC, LIC, FST and EHC. It is not sent where the offer is for employment services only, or where no service offer has been made. This BLA may be printed centrally or as a local immediate print. The letter will also contain details of the Proof of Identity (POI), and POI tier level required, based on information from the POI screen and the payment type being claimed. • Preliminary Claim Form (PCF) - this BLA ensures the customer has been advised of the most appropriate payment to claim. The customer must

	complete and lodge the PCF within 14 days after their initial contact, to ensure they meet the requirement to lodge a claim within 14 days.
5	<p>Document Recording + Read more ...</p> <p>The First Contact DOC will be created for all customers who complete the First Contact workflow who have received a service offer of NSA and YA, PP, DSP (Job seekers), DSP manifest, CP and/or CA, SA, CSHC, LIC, FST and EHC, Employment Services only, Non-working age payments, students, no offer and third party contacts. The DOC will contain information relevant to Life Events, Responses, Financial Details, Modules and Documents.</p> <p>If the partner has chosen to claim Age Pension, CSHC or LIC on the same claim form as the customer, a First Contact DOC and CCD will also be created on the partner record.</p> <p>A callback DOC will also be created where a Finalisation appointment for a customer could not be made.</p> <p>For YA and NSA claimants aged 22-24 and identified as being streamed to a Senior Customer Service Officer (SCSO), an additional DOC will be created. This DOC will be left open and will include relevant keywords.</p>

Resources

This page contains a link to the claim form for Disability Support Pension (DSP) or Sickness Allowance (SA317 (B)).

Forms

[Claim for Disability Support Pension or Sickness Allowance \(SA317 \(B\)\)](#)

Training & Support

This page contains training information. Links on the page may be unavailable to external audiences.

[CTT0800 - First Contact Service Offer](#)

A login ID and password may be required.

Note:

- Ensure that line manager's approval has been provided before applying for any training through ESSentials.
- If the links above do not work, go to [Learning Portal](#) in ESSentials and search for the relevant course number under **Find a course**.

Opening the First Contact Service Offer application 106-03010010

Background

This document outlines opening the First Contact Service Offer (FCSO) application. The First Contact Service Offer is the screening process conducted when a customer first contacts the Department of Human Services either at a Service Centre or Smart Centre Call.

Related links

[Running the First Contact Service Offer \(FCSO\) application](#)

[Customer First](#)

Process Summary

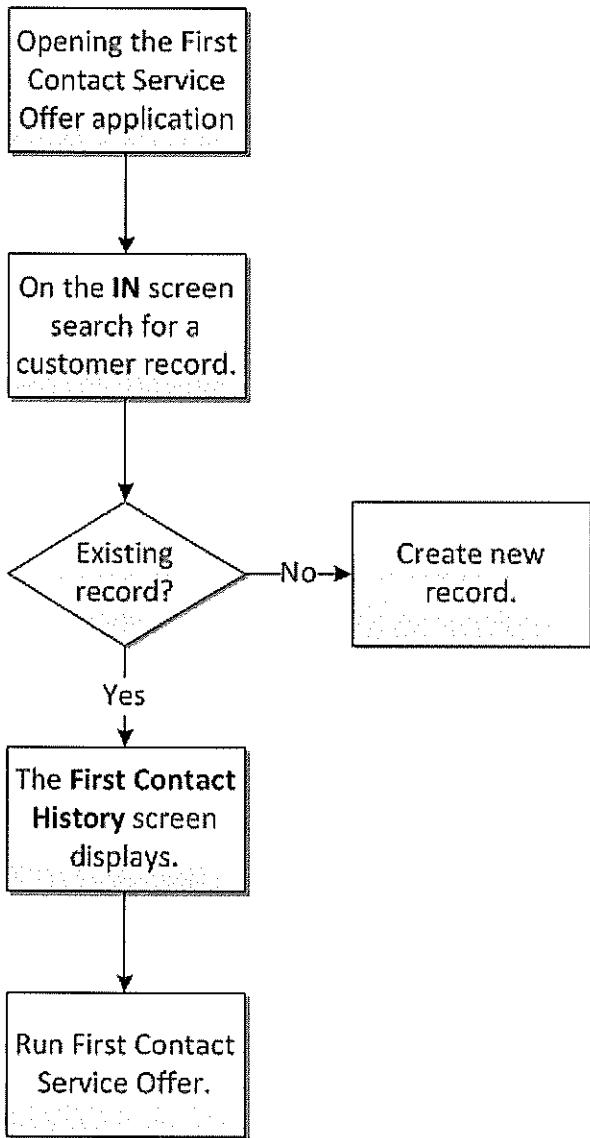
This page contains information on opening the First Contact Service Offer (FCSO) application.

Flowchart

Opening the FCSO application

This image will assist Customer Service staff to open the First Contact Service Offer (FCSO) application.

Note: a text based version of this process is located [here](#).



Process

This page contains information on opening the First Contact Service Offer (FCSO) application.

FCSO application

Opening FCSO application

This table describes the steps to open the FCSO application.

Step	Action
1	<p>Opening FCSO + Read more ...</p> <p>Navigate to the Name Search (IN) screen to search for a customer. Where the customer does not have a record, <u>index the customer</u> coding 'FSC' in the ServRsn: field and 'ADD' in the Act: field.</p>
2	<p>First Contact History screen + Read more ...</p> <p>When a customer's record has been accessed the First Contact History screen will display.</p>

	<ul style="list-style-type: none">• The navigation button will read 'Start workflow' when there is a customer record open and there is no 'Incomplete' interview on the customer record.• The navigation button will read 'Continue Workflow' when there is a customer record open and there is an 'Incomplete' interview on the customer record.
3	<p>Running FSCO + Read more ...</p> <p>Go to Running the <u>First Service Contact Offer</u> to continue the application.</p>

First Contact Service Offer screens and functions 106-03010030

Background

This document outlines the screens used for registering a claim and assessing job seeker readiness by the First Contact Service Offer (FCSO) process for Service Centres and Smart Centre Call.

Related links

[First Contact Service Offer \(FCSO\)](#)

[Running the First Contact Service Offer \(FCSO\) application](#)

Process

This page contains information about screens and their functions in the First Contact Service Offer (FCSO) application.

On this Page:

[Screens in FCSO for initial contact](#)

[Screens for Initial Service Offer and other circumstances](#)

[Job Seeker Registration and claim outcomes](#)

Screens in FCSO for initial contact

First Contact History, customer contact details and Life Events screens

This table describes information on FCSO screens that capture customer's First Contact History, contact details and the life events.

Category	Description
1	<p>First Contact History + Read more ...</p> <p>This screen is displayed when the First Contact application is opened and a customer record is opened. This is a 'display only' screen which provides a summary of a customer's historical First Contact interviews and outcomes. The 'related workflow' drop down list will always display 'First Contact Workflow'. Depending on the customer's circumstances, the navigation button next to the 'related workflow' will display text reading either:</p> <ul style="list-style-type: none"> • Start new workflow or • Continue workflow <p>Select the navigation button displayed.</p>
2	<p>First Contact Details + Read more ...</p> <p>This screen is used to record contact details:</p> <p>Contact made by: choose from the drop down list.</p> <p>Contact made via: choose from the drop down list (e.g. office contact).</p>

Where are you calling from? choose from the drop down list (will only display if user is from a Smart Centre Call or contact mode is telephone).

Contact made on: default response is date of contact. Contact date can only be backdated up to 14 days.

What delayed your contact with us?: choose from the drop down box (only displays where appropriate).

Is this an early claim?: Yes/No

Will you be prevented from lodging your claim within 14 days due to a special circumstance?:

- **Yes** - condition affecting me
- **Yes** - caring for someone with a medical condition

No

Do you require someone to act on your behalf?: Yes/No response.

- If the customer already has a Correspondence and/or Payment nominee, these will be displayed and the question will be '**Do you want this arrangement to continue?**' Yes/No response. Court appointed nominees will not display.
- If **no**, a message will display advising the arrangement should be cancelled using the Nominee Script after FCSO is completed.

Do you give permission for your partner to enquire?: Yes/No response.

- **Does the partner give permission for the customer to enquire?:** Yes/No response
- If the response is **yes** to either of the above questions, the PPE status will be updated by the FCSO workflow

What language did you first speak as a child?: choose from the drop down list.

What is your preferred language?: choose from the drop down list.

Do you require an interpreter?: Yes/No (this will only appear if preferred language is not English).

What language do you require to be interpreted?: choose from the drop down list.

Is an interpreter being used for this interview?: choose from the drop down list.

What language is being interpreted?: choose from the drop down list.

Continue to **Privacy Prompt**.

3

Third Party Contacts to Request Claim + [Read more ...](#)

Only a limited service offer can be provided where the customer is not contacting in their own right, including capture of Claim Contact Date (CCD). Updates to an existing record should not be made unless otherwise satisfied that this information is correct.

Please advise the third party that claim forms can be sent to the customer based on the information supplied but, would not include any customised forms. Cancellation of FCSO will create a Claim Contact and if the customer would like to recontact personally, customised forms can be sent.

4

First Contact Service Offer Privacy Prompt + [Read more ...](#)

The Privacy Prompt contains information of which the customer must be advised when claiming via the First Contact Service Offer process.

For privacy reasons and duty of care, the user must obtain the customer's consent to proceed further with the application. Advise the customer of the information on this screen. Once the user has obtained the customer's consent, select the **Yes** option then click the **Continue** button. The application will then advance to the **Customer Summary** screen. The customer must be issued with a Privacy Information booklet. If the customer does not give their consent, select the **No** option and click the **Continue** button. The user will be navigated to the **Outcomes** screen.

5

Customer Summary [+ Read more ...](#)

All fields on this screen will be pre-populated with the data currently recorded on the customer's record.

Customer details: Information on name, gender, date of birth and relationship details (including date of occurrence if appropriate) will be displayed.

Relationship Details:

Has your relationship status changed?

Certain responses may generate additional questions:

- What is your current relationship status? And
- Are you still partnered with ...?

Address details: Current information including:

- home address
- postal address
- term address
- temporary address
- home phone
- contact phone
- mobile phone
- customer authority to send messages via [Centrelink Electronic Messaging \(EM\)](#)
- work phone
- Email address is displayed. Hyperlinks can be used to edit existing or record new information

Note: proceed through FCSO workflow to get to the Electronic Messaging workflow to [unsubscribe customer from Electronic Messaging \(EM\)](#).

Other contact details:

Do you have any special contact considerations?: check box.

What is your preferred language?: choose from the drop down list.

Do you require an interpreter?: Yes/No.

Are you?(Aboriginal, Torres Strait Islander).check box.

Preferred: Customer Service Centre choose from the drop down list.

Continue to **More Customer Information** screen.

Click on the **continue** button.

6

More Customer Information [+ Read more ...](#)

Residence information: The residence questions are dynamic, so this means the type of questions displayed will depend on the person's individual circumstances, and whether information was available from the customer's Australian immigration record, or existing information from Mainframe. The following are possible questions which may be asked:

- What is your country of citizenship?
- Are you a refugee or former refugee?
- Are you a permanent visa holder?

(The following note will only appear for customers who identify as New Zealand citizens.) Please note this does not include special category visas granted to New Zealand passport holders.

- Did you arrive in Australia on a New Zealand passport?
- Were you in Australia on 26/2/01?
- Were you in Australia for 12 months in the 2 years period from 26/2/99 to 26/2/01?
- Are you a refugee who has arrived in Australia within the last 13 weeks?
- Are you a refugee who has arrived in Australia for the first time within the last 7 days?

Have you been employed for 20 hours or more a week for a total of 13 weeks anytime in the last 12 months? - This question is displayed where the customer is female, born before the 1st July 1955 and has indicated that their relationship status is widowed, divorced or separated.

Are you the principal carer of a dependent child aged under 16?

If the customer answers yes to this question the following additional question will be displayed:

What is the date of birth of your youngest child under 16 years?

All questions **must** be **answered** before continuing.

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Life Events + [Read more ...](#)

This screen initially presents all of the primary life events in the following order, with an 'expand toggle'(+):

Responsible for children

Looking for Work

Leaving, seeking or changing education

Sick or have a disability or injury

Caring for a child or adult who has a medical condition or disability; or an adult who is frail aged

- If the carer life event is selected, FCSO will display on the **Additional Forms and Modules screen** a list of records that are linked to the customer i.e. Children, previous care receivers, nominees and partners. If the current care receiver is listed the CSO can select them from here. This will assist in sending customised forms
- **Note:** If the customer has been issued a **Carers Streamlined Transfer - Child to Adult form**, discuss the customer circumstances and appropriate timing for returning their forms
- Where a carer has been identified as eligible for a manual Carers Streamlined Transfer - Child to Adult for the care receiver, the following message-4064; displays on the '**Additional forms and modules**' screen: 'This customer is

eligible for the Carers Streamlined Transfer - child to adult form(s) for Carer Payment and/or Carer Allowance'. If the customer wishes to proceed with the Carers Streamlined Transfer, select the relevant payment type(s) from the 'When 16+' or 'When 18+' row(s). The transfer is simpler than doing a full new claim and if the carer is qualified for Carer Payment and/or Carer Allowance under the provisions for adult care receivers, payment will continue without a break in entitlement

- For further information, see [Carer Payment and /or Carer Allowance Automatic Carers Streamlined Transfer - Child to Adult](#)
- **Note:** advise the carer that a care receiver aged 16 or over may also be entitled to an Income Support Payment (ISP). FCSO must be run separately for the customer who is a care receiver

Planning for or needing help in retirement

Changing your partner or relationship status

Recently arrived in Australia

In crisis or needing special help

Self employed or responsible for a farm or business

Australian Apprentice

The expand toggle is used to display sub life events which the user may select. In some cases questions will be generated by the choice of a sub event.

There is no restriction in the number of sub life events that can be selected for a customer. A hierarchy will be applied by the system to determine the most appropriate initial service offer.

At least one life event must be selected.

Selection of particular life events will generate additional questions:

Is this customer claiming because of drought? (a 'yes' response will create a **DOC** with keyword DROUGHT)

Centrelink understands that some medical conditions can prevent you from participating in any type of activity.

Does your condition require ongoing nursing home level of care or is classified as a terminal illness? (a 'yes' response will mean the customer is treated as a Disability Support Pension (DSP) Manifest customer).

Continue to the **Initial Service Offer** screen.

Screens for Initial Service Offer and other circumstances

Initial Service Offer, Living Arrangements and other circumstances screens

This table describes information on the initial service offer and a customer's personal circumstances including living arrangements and income and assets.

Category	Description
1	<p>Initial Service Offer + Read more ...</p> <p>This screen will display the service offer(s) appropriate for the customer, and present static information text. Up to three offers may be presented. The most appropriate service offer as determined by the system will be marked 'recommended'.</p>

The user chooses the most appropriate by clicking on the appropriate check box.

Depending on the service offer chosen further questions may be generated, for example:

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Would you like to answer some more detailed questions to identify how we can assist you? Yes/No

For customers whose service offer is Newstart Allowance (NSA) or Youth Allowance (YA) (job seeker) an alternative text will be displayed for the Customer Service Officer (CSO).

Where the customer has agreed to, or is required to have, a provider referral click 'continue' to the **About You** screen.

For customers whose service offer is Carer Payment and/or Carer Allowance, it will be necessary to identify if the carer is:

- Caring for a person under the age of 16 years
- Caring for their partner
- Caring for a person (not their partner) age 16 years and over.
- Where a carer who already receives Carer Allowance for two adult care receivers, claims CA for a third care receiver, FCSO will prompt the CSO to check if the customer would like to proceed or not

Please advise the customer they currently receive Carer Allowance for two adult care receivers. A carer can only qualify for a maximum of two payments of CA for adult care receivers at one time. The carer may continue with the claim however, if granted they will be required to relinquish payment of CA for one of their existing care receivers.

Different prompts will be displayed for other service offers, including the option of an online or paper claim for YA (student) and Austudy customers. When the option is for a paper claim to be issued the user will be navigated to the **Requested documentation** screen. In some cases no service offer may be appropriate, and relevant information text will be displayed. Navigation will be to the **Outcomes** screen.

FCSO will identify customers who could be eligible for the Pensioner Education Supplement (PES) or eligible for ABSTUDY Pensioner Education Supplement (PES) and will display this as a service offer. Customers, who receive some types of Department of Veterans' Affairs (DVA) payments, will have specific messaging displayed and a link to qualifications for PES before a claim for a Pensioner Education Supplement (SY004) or a claim for ABSTUDY Pensioner Education Supplement - Form C (SY010) is issued to the customer in some circumstances.

Self Service encouragement question:

Centrelink has a number of Self Service options where you can use the phone or internet to enquire and/or update your record unassisted. Would you like to register for this service?

If the customer does indicate an interest in Self Service, once FCSO has finalised, the CSO will be automatically taken to the Access Management for Self Service (AMSS) workflow. A **DOC** is created as a part of the FCSO workflow which will be **automatically placed on hold** during the First Contact Service Offer workflow.

If the customer does not indicate an interest in Self Service, a **DOC** is created as part of the FCSO workflow which will be closed.

2

About You + [Read more ...](#)

Note: not all of the following questions will be asked of each customer. Questions will be tailored to individual circumstances.

Do you consider you speak English - select response from list.

The FCSO will identify customers eligible for:

[Skills for Education and Employment \(SEE\)](#), or

[Adult Migrant English Program \(AMEP\)](#)

through the questions in the Job Seeker Classification Instrument (JSCI).

Have you attended any English courses in the last 6 months?

What is your country of birth?

What country did you come from? - select only **one** response from the list.

This question is voluntary; however your answer may help us to help you. **Are you...** - select the relevant response(s) from the options displayed.

Are you a single parent? -Yes/No.

Do you have 4 or more children ages 6 years and over but less than 16 years in your care? - Yes/No.

Are you a registered and active foster carer parent? - Yes/No.

Do you provide home schooling to your children? - Yes/No.

Are your children undertaking distance education? - Yes/No.

3

Living Arrangements + [Read more ...](#)

What are your accommodation circumstances? - select response from list

Who lives with you?

What is the reason you do not live with your parents?

The next question asked is to identify if the customer has any accommodation difficulties that they may be facing, if any, which could be a possible barrier to getting a job.

Are you currently living in emergency or temporary accommodation? - Yes/No.

How long have you lived at your current address?

How often have you moved in the past year?

4

Other circumstances + [Read more ...](#)

What have you mostly been doing in the last two years? - select the relevant response(s) from the options displayed. If paid work is selected these additional questions will be asked:

How many hours did you mostly work per week?

In the last eight weeks, have you voluntarily ceased employment or become unemployed due to misconduct?

Have you done any paid work in the last two years?

Are you doing any paid work now?

If the customer answers they are not working or working less than 15 hours per week and they are claiming NSA or YA as a principal carer they will be asked: **Are you currently doing 15 hours per week or 30 hours per fortnight of paid work and study?**

If the customer has answered they are working 15 hours or more per week and they are claiming Newstart Allowance or Parenting Payment and aged 55 and over they are to be advised, they will need to provide verification of these details at their Income Support Finalisation Appointment by providing work telephone contact details.

If the over 55 customer has answered they are not working or working less than 15 hours the additional question is to be asked: **Are you currently doing 15 hours or more per week or 30 hours per fortnight of either paid work, approved voluntary work or a combination of both these activities?** - Yes/No.

If the customer answers **Yes** to this question they are to be advised that they need to provide verification of these details at their Income Support Finalisation Appointment by providing work telephone contact details. If the customer answers **No** they are to be advised they can satisfy the Activity Test by doing 15 hours or more per week of either work, approved voluntary work or a combination of these activities.

Advise the customer they are required to independently organise their engagement in approved voluntary work and they should contact Centrelink again after they have commenced to allow verification and to provide evidence they are meeting their Activity Test requirements.

Immediately before claiming what were you doing? - select the relevant response(s) from the options displayed

Have you ever worked?

Have you recently left studies? - This question is not asked when the service offer is Parenting Payment or Disability Support Pension.

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Other circumstances (continued) [+ Read more ...](#)

Are you participating in a Community Development Employment Project (CDEP)? - Yes/No.

Have you been married or lived as a member of a couple that has lasted for at least 12 months, or at least 6 months where the relationship ended due to exceptional circumstances (such as violence or death of partner)? - Yes/No.

Have you ever had a child (naturally or legally adopted)? - Yes/No.

Have you worked at least 15 hours per week for 24 months since leaving secondary school? - Yes/No.

Have you worked for at least 30 hours per week for 18 months (within the last 24 months)?

Have you earned 75% of the maximum Wage Level A of the National Training Wage schedule in a modern award in an 18 month period since leaving school? - Yes/No.

Does it take you 90 minutes or more to travel one way from your permanent home by public transport to reach your place of study or work?

6

Your health, other factors and confidence to work details [+ Read more ...](#)

This question is voluntary. **Do you have any disabilities, medical conditions or addictions that affect your ability to work?** - select **one** response from the list. If the response is **No** or **Not sure**, the next three questions will not be asked.

Will any of these conditions affect your ability to work in any job for three months or more? - select **one** response from the list. If the response is **No**, the next two questions will not be asked.

So that you can be referred to the most suitable type of assistance please tell me what is your condition? - select the relevant response(s) from the options displayed.

Do you have any other conditions that affect your ability to work?

Are you able to work at least 15 hours a week? -Yes/No.

7

Your education and work qualification details [+ Read more ...](#)

What is the highest level of primary or secondary schooling you have completed of those listed? - select **one** response from the list.

Have you completed any further education? - Yes/No. If the response is **No**, the next question will not be asked.

What is the highest qualification you have completed? - select **one** response from the list.

Have you completed any work related qualifications? - Yes/No.

Can you use your qualification? - Yes/No. If the response is **Yes**, the next question will not be asked.

Why is that? - select **one** response from the list.

So that we can refer you onto any specific programs we need to ask the following questions:

Do you consider you read English... - select **one** response from the list.

And do you consider you write English... - select **one** response from the list. If customer has indicated **Not well** or **Not at all** a further question will be asked:

- **Have you attended an English literacy courses in the last six months?** - Yes/No

8

Other personal factors [+ Read more ...](#)

This question is voluntary, select **one** response from the list.

For customer under 18 years of age:

Have you been convicted of a criminal offence in the last five years?

For customer who is between 18 years and 23 years of age:

Have you been convicted of a criminal offence as a juvenile in the last 5 years or as an adult in the last 10 years?

For customer over 23 years of age:

Have you been convicted of a criminal offence in the last 10 years?

If customer's response was **Yes**, the following three questions will be asked:

- **Did you serve a custodial sentence?** - select **one** response from the list.
- **Was the custodial sentence...** If more than one month was chosen the next question will be asked.

- **Was the custodial sentence completed in the last 2 years?** - select **Yes** or **No**.

This question is voluntary.

Are there any other factors which you think might affect your ability to work, obtain work or to look for work that we haven't already discussed?

- select the relevant response(s) from the options displayed.

9

About Your Finances Income and Assets + [Read more ...](#)

Do you earn more than \$ (the allowable income limit dependent on whether the customer is single, partnered, Principal Carer or homeowner)? - Yes/No.

Do you have assets (excluding the family home) over \$ (the allowable asset limit will be displayed dependent on whether the customer is single/partnered and/or a homeowner or non-homeowner)?

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Job Seeker Registration and claim outcomes

Screens for registration of job seekers, forms, modules and FCSO outcomes

This table describes details on screens for job seeker registration, recording additional forms and modules and a list of outcomes for FCSO.

Category	Description
1	<p>Job seeker Registration screen + Read more ...</p> <ul style="list-style-type: none"> • This screen is used to register a customer as a job seeker, including as a Stream 1 (Limited), No Stream Services Referral Required (NSSRR) job seeker or No RJCP referral Required (NRRR) • Note: FCSO will identify if the customer is in a Remote Jobs and Communities Program (RJCP) region. • The following questions are used to determine whether a job seeker is a Vulnerable Youth or Vulnerable Youth (Student): • Are you currently working an average of 15 hours per week or more? • Does the young person have at least one serious non-vocational barrier? • Are you a Full-time student? • Is the person a youth presenting in crisis? • Are there other suitable local services available? • CSO can also indicate whether the job seeker is participating in a non-supplement Community Development Employment Project (CDEP), and the start date. <p>The remaining questions are Office Use Questions Only and are used to identify if the job seeker belongs to a special category, including:</p> <ul style="list-style-type: none"> • Live Cattle Exports Redundant Workers • Insulation Redundant Workers • Tasmanian Forestry Redundant Workers

	<ul style="list-style-type: none"> NZ Non-Protected SCV.
2	<p>Online Diary + Read more ...</p> <p>The Online Diary workflow within the FCSO is used to make the referral for the job seekers to a Job Services Australia provider of their choice, where appropriate.</p> <p>The Online Diary also displays information about the Job Services Australia provider's performance star ratings.</p> <p>For more details, see Online Diary.</p>
3	<p>Additional Forms and Modules screen + Read more ...</p> <p>For Carer Payment (CP) and Carer Allowance (CA):</p> <p>The Additional Forms and Modules screen displays a list of current or previously linked person(s) allowing you to select a claim for Carer Payment and/or Carer Allowance if the name of the person(s) being cared for is displayed. Customised forms may be issued to the Carer and the linked person(s) when a claim is made for a current or previously linked person(s).</p> <p>If the name of the person being cared for is not displayed you will need to select a claim for Carer Payment and/or Carer Allowance by indicating the number of persons being cared for under the 'New Person(s) Under 16 and/or 'New Person (s) 16 and over' option. Customised forms may be issued to the Carer however non customised forms will be issued in regards to the new person(s) being cared for.</p> <p>If Carer Allowance and/or Carer Payment is selected on the initial service offer screen and the care receiver is already current on the payment(s) then the payment type will be protected. If a care receiver is current on a Carer Allowance Health Care Card only the Carer Allowance payment type will be unprotected allowing for a claim of Carer Allowance at payment level.</p> <p>If the check box for a required payment type is protected, the CSO will need to return to the Initial Service Offer screen to select the required Service offer(s).</p>
4	<p>Requested documentation + Read more ...</p> <p>Displays for all payment service offers. Where no modules or documents are required, the screen will display 'No document is required'.</p> <p>Modules and documents that have been selected automatically will appear on the screen. Associated check boxes are used to de-select or select additional items.</p> <p>For Carer Payment and Carer Allowance service offers, FCSO will advise which claims, medical reports and other forms are necessary for the customer's and care receiver's situation. FCSO will display the forms to be completed under a heading for the carer and care receiver(s).</p> <p>A search box assists in finding other required forms and/or brochures that may need to be sent to the customer. Enter a keyword or form number to display a tailored list to select from.</p>
5	<p>Proof of Identity (POI) + Read more ...</p> <p>Displays a message to inform the customer of the amount of Proof of Identity (POI) required for their new claim.</p> <p>Various messages will be displayed depending on the POI that has already been provided. Where a customer has full POI recorded and is not required to provide additional documents, the message will display as:</p>

- 'As the customer is eligible for abridged POI and they have fully satisfied their POI requirements, no further POI is required to assess their claim. 'The amount of POI required will be displayed on the FCSO **DOC**, or if abridged requirements are met the **DOC** will state, 'Authenticated and Abridged POI satisfied'

The Intention to Claim letter provides the customer with a written request for the amount of POI required, if appropriate.

6	<p>Looking for Work screen (for Service Centres only) + Read more ...</p> <p>Allows for printing of the Looking for Work question and responses.</p>
7	<p>Preliminary Claim Form + Read more ...</p> <p>Allows for printing of the Preliminary Claim form (where this is required).</p>
8	<p>Confirmation of Your Intention to Claim + Read more ...</p> <p>Allows for printing (either centrally or as local immediate print) the Confirmation of Intention to Claim.</p> <p>For Carer Payment and Carer Allowance claims, the Confirmation of Intention to Claim (ITC) letter will display Proof of Identity (POI) requirements for both the customer and the care receiver. FCSO will retrieve the information from the POI screens and will place the appropriate message on the ITC. For example where the customer has previously supplied a cardinal document and they require Tier 3 POI, the message: 'You need to provide 100 points of identification for yourself' will display.'</p>
9	<p>First Contact Service Offer Outcomes + Read more ...</p> <p>A list of outcomes from the First Contact will be displayed at the end of the workflow, where it has been either completed or interrupted. It presents a summary of the outcomes and in certain circumstances will provide the option of running the First Contact application on the customer's partner.</p> <p>The fields displayed on this screen will depend on both the initial service offer type and whether the user is exiting the workflow.</p> <p>Proof of Identity (POI) requirements will display based on POI previously provided. FCSO will retrieve the information from the POI screens and will display a message For example where the customer has previously supplied a cardinal document and they require Tier 3 POI, the message will be: You need to provide 100 points of identification for yourself.</p> <p>For Carer Payment</p> <p>Does the customer wish to apply for an interim claim while their claim for Carer Payment is being determined? Yes/No response.</p> <p>If 'Yes', Please re-run FCSO and select an alternate Service Offer for the customer to test their eligibility, upon completion of this interview.</p> <p>Appointments</p> <p>All appointments required as a result of the <u>First Contact Service Offer workflow</u> will be identified on the Outcomes screen.</p> <p>Appointment types available are:</p> <p>Job Services Australia provider</p> <p>Participation assessment/new claim</p>

Specialist

Note: Disability Support Pension (DSP) Participation appointments cannot be made using the tool (check Mapstat for local arrangements).

Job Services Australia provider appointments

Where a provider appointment is required, or desired by the customer, appropriate text will be displayed in the **comments:** field according to the customer's circumstances.

Where the customer is already connected to a provider, the provider details will be displayed in the **comments:** field.

Appointments to finalise claim

Where the service offer is for a non-working age payment (defined as Age Pension (AGE), Sickness Allowance (SA), Special Benefit (SpB), ABSTUDY and Austudy) the **appointment** button will display as **New Claim**. There is no compulsion for the user to book an appointment. The CSO will be prompted to check local procedures.

The appointments screen will not display for Carer Payment (CP) service offers or when Carer Allowance (CA) is the only service offer.

Where the service offer is for NSA, YA, PP or DSP the appointment button will display as **Participation Assessment**. Appropriate text will be displayed in the 'comments' field according to the customer circumstances.

Specialist appointments

The type of specialist appointment required will be displayed in the 'comments' field. Selecting the appropriate appointment button will launch the automatic appointment booking systems.

If an appointment has not been made after an attempt, a Callback appointment will be suggested as an option in some circumstances.

If a Callback appointment is required but cannot be made, a callback **DOC** will be created.

Completing the workflow will produce **DOCs** that record information obtained as part of the First Contact process. Three types of **DOCs** will be produced:

- First Contact Workflow **DOC**
- Callback **DOC** (where a participation assessment appointment for a customer could not be made)
- NSA/YAL under 25 **DOC**.

Self Service Offer

If a positive response was selected for Self Service, the CSO will be taken to the Access Management for Self Service (AMSS) application.

Training & Support

This page contains training information. Links on this page may be unavailable to external audiences.

Training packages

The following training about this topic is available for staff in ESSentials.

[**CT10800 - First Contact Service Offer**](#)

A login ID and password may be required.

Note:

- ensure that line manager's approval has been provided before applying for any training through ESSentials
- if the links above do not work, go to [Learning Portal](#) in ESSentials and search for the relevant course number under **Find a course**