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28 September 2022

Dynamics 365 Legal Aid Portal - LAGRANTS 2.0
Legal Aid ACT

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Part 1: Introduction

Overview

This manual provides guidance for using the Legal Aid PowerApps Portal (LAGRANTS 2.0).

Guidance Includes

- Introduction to LAGRANTS 2.0
- Redeem the Invitation and Login into the portal
- Update account and contact details
- View assign service
- Request an Extension
- Request a Reconsideration of a refused extension
- Request a Reconsideration Review
- Raise Invoice

LAGRANTS 2.0

LAGRANTS 2.0 is an extension of the Dynamics 365 solution implemented for Legal Aid ACT. The portal gives private firm access to view assigned services, raise invoices against approved extensions and request additional extensions for an assigned service if required.

A private firm's primary contacts don't have to be Dynamic 365 licensed users to use the portal. Information entered in the portal is instantly presented in Dynamics 365. The primary contact can update the account (Private firm) information and their profile details directly in the portal.

The primary contact for the private firm account can also view details of any additional contacts linked to the account. Access to the portal is gained by redeeming an invitation code sent from within Dynamics 365.
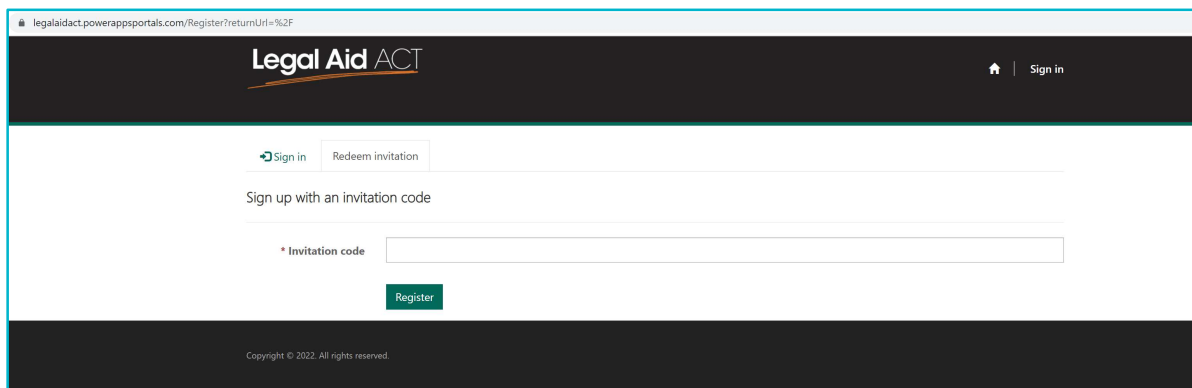
Part 2: Redeem Invitation

<u>Scenario</u>

How to redeem the invitation and register to the LAGRANTS 2.0 portal.
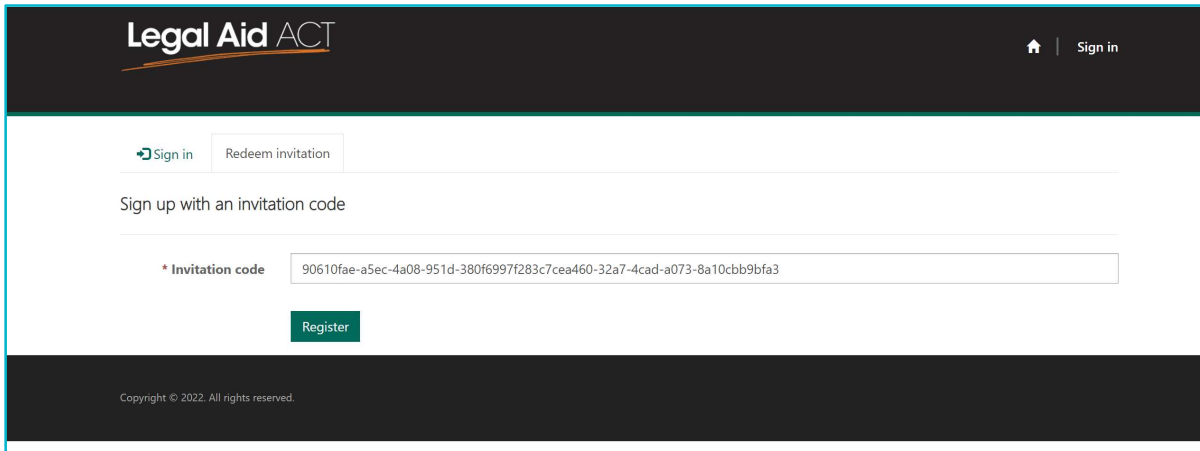
Redeem Invitation Code

An invitation code will be received by email and can be redeemed from the LAGRANTS 2.0 portal. The user is required to register before gaining access to the portal. To register to the portal, perform the following steps.

1. Click on the link on the email or copy and paste it into a browser to display the LAGRANTS 2.0 portal page
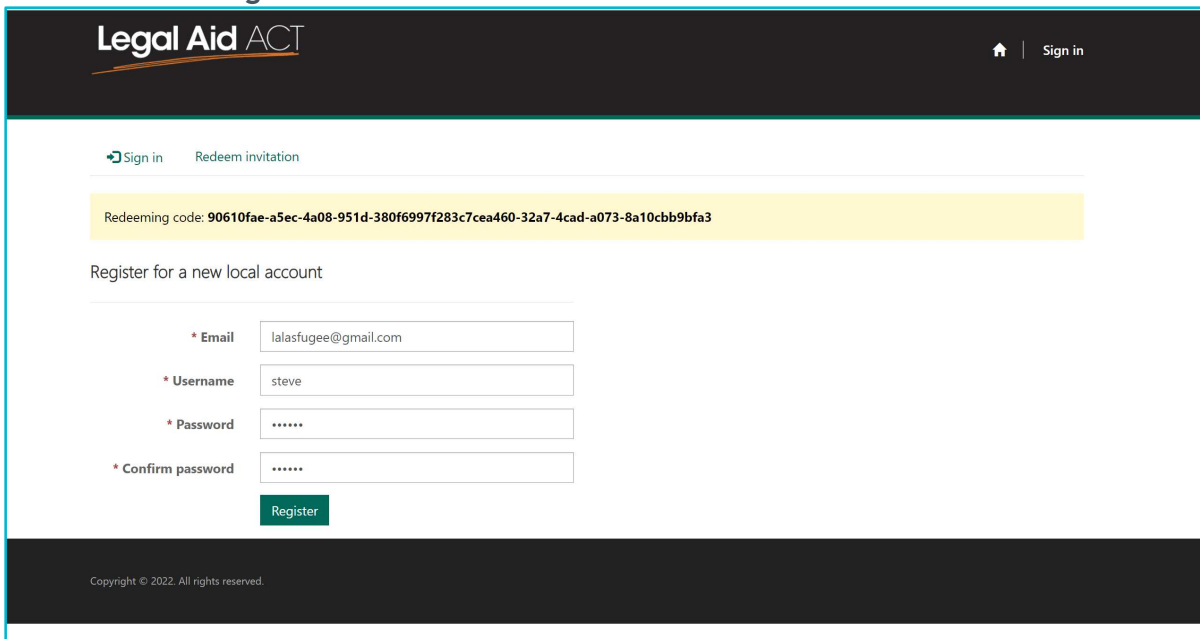

2. Copy and paste the invitation code on the email into the **Invitation Code** Field and click on Register

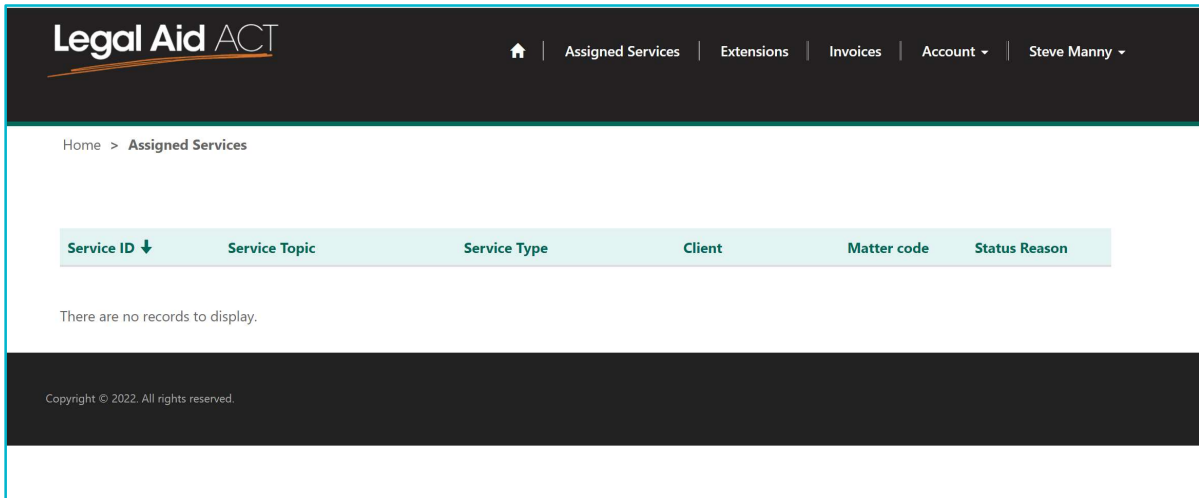3. The email is automatically populated with the primary contact email

4. Enter **Username**

5. Enter **Password**

6. Enter **Confirm Password**

7. Click on **Register**

8. The portal page is displayed as shown below

_____

Part 3: Update Details in Portal

Overview

This module presents how to update account and contact details in the portal. Primary contacts for a private firm account can update details of the account directly from the portal. They can also update their profile information from the portal which will be synced into Dynamics 365.

Scenario

Update account and contact details on the portal.

Update Account Details

1. Click on **Account** to display the drop-down menu

2. Select Edit Account
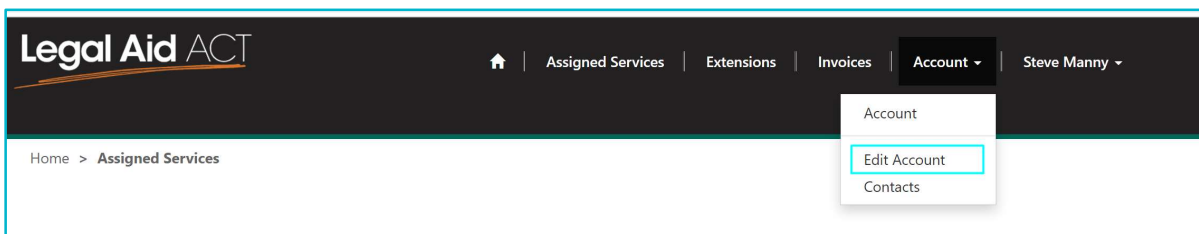
3. On the Edit Account form displayed enter or update the required information

Summary

ACCOUNT INFORMATION

Business Name *
Australia Law Firm

Areas of Practice/Specialty
Family ×   Criminal ×

ABN
123664866

Registered for GST
○ No   ● Yes

Phone
0423659632

Website
https://www.autralialawfirm.com.au

Number of Solicitors
3

Publicise
Yes

SPECIAL INFORMATION

Special Instructions

ADDRESS

Address 1: Street 1
123B Apple-Bee Avenue

Address 1: City
Canberra

Address 1: State/Province
ACT

Address 1: ZIP/Postal Code
2600

Address 1: Country/Region
Australia

Finance Institution Details

Name of Institution

Account Name

BSB

Account Number

Submit

4. Click Submit

Home > Account > **Edit Account**

Submission completed successfully.   x

Note! *Dynamics 365 is instantly updated with any Information entered in the portal*

Update Profile (Contact) Details

5. Click Username (Steve Manny) to display a drop-down menu
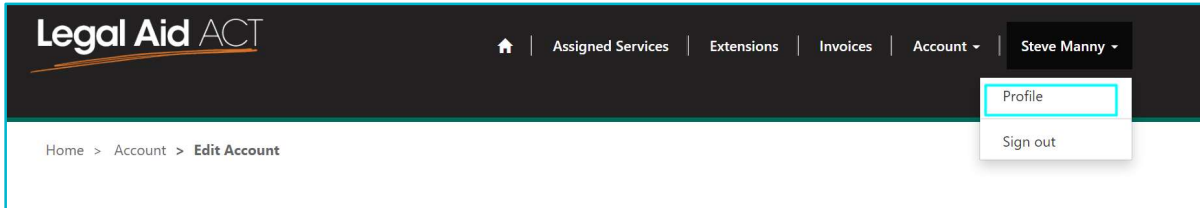
6. Select **Profile** to display the contact form

7. Enter or update the required information and click **Submit**

Confirm Email

You may be required to confirm you email address on the portal. To this follow the steps below.

1. Click on Confirm Email

2. An email is sent to you email address will a link. Sample of the Email shown below
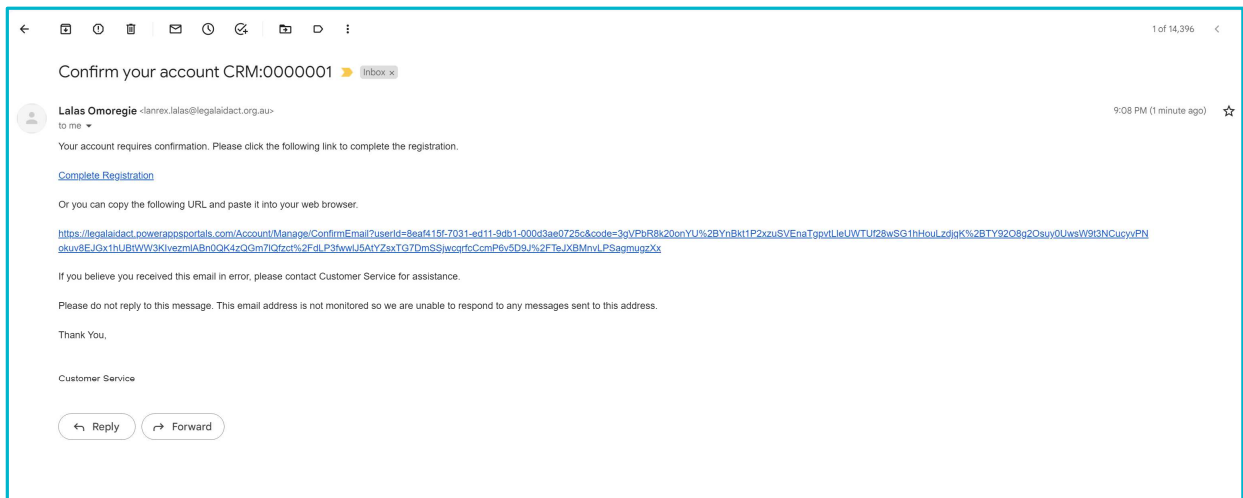
3. Click on Complete Registration or copy and paste the link on your browser to confirm your email. Ensure you are login to the portal on the same browser or you may be required to sign in
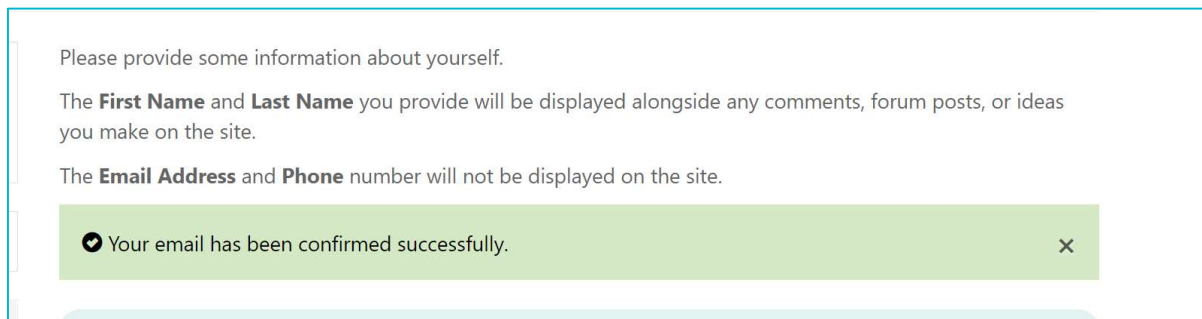
Part 4: View Assigned Service on the Portal

Overview

Portal users can view assigned services on the portal.

View Assigned Service from the Portal

1. On the portal go to **Assigned Services**.

2. To open the Service record, click on **Service ID** or select the down arrow beside Status Reason and click on **View details**.

3. The Service form will display as shown below.

Understanding the Portal Service Form

The Service form on the portal is Read-only, Portal users cannot edit the form. They can only Request additional extensions from within the Service Form. The different sections of the form are explained below.

1. **Service Information** -basic information about the Service. It indicates the name of the Client, Matter Code and Matter Description.

Details

Service Information

Service ID

SER-01450

Service Type

Referred

Matter Code

CDEC

Client

Dan Brown

Matter Description

Deception / Fraud

Approved Extensions

Extension ID	Name	Total Amount	Status Reason	Created On ⬇	
EXT-01132-L6Q7C3	Sammy Extension	$6,360.00	Approved	9/11/2022 8:37 PM	⌄

Requested Extensions

Request Extension

Extension ID	Name	Total Amount	Status Reason	Created On ⬇

There are no records to display.

Invoiced Extensions

Extension ID	Name	Related Service	Total Amount	Status Reason	Created On ⬇

There are no records to display.

2. **Approved Extensions** – The extension created and approved for the Service is shown on the Approved Extension Subgrid

3. **Requested Extensions** – additional unapproved extensions requested for the service are shown on this Subgrid. This also includes refused extensions, extensions open for reconsideration and review

Matter Code			Client		
CDEC			Dan Brown		

Matter Description

Deception / Fraud

Approved Extensions

Extension ID	Name	Total Amount	Status Reason	Created On ⬇	
EXT-01132-L6Q7C3	Sammy Extension	$6,360.00	Approved	9/11/2022 8:37 PM	⌄

Requested Extensions

<div align="right">Request Extension</div>

Extension ID	Name	Total Amount	Status Reason	Created On ⬇

There are no records to display.

Invoiced Extensions

Extension ID	Name	Related Service	Total Amount	Status Reason	Created On ⬇

There are no records to display.

Invoices

Invoice ID	Name	Extension	Total Amount	Status Reason	Created On ⬇

4. **Invoiced Extensions** – Extensions for which invoice has been created are shown on this Subgrid.

Deception / Fraud

Approved Extensions

Extension ID	Name	Total Amount	Status Reason	Created On ⬇	
EXT-01132-L6Q7C3	Sammy Extension	$6,360.00	Approved	9/11/2022 8:37 PM	⌄

Requested Extensions

Request Extension

Extension ID	Name	Total Amount	Status Reason	Created On ⬇

There are no records to display.

Invoiced Extensions

Extension ID	Name	Related Service	Total Amount	Status Reason	Created On ⬇

There are no records to display.

Invoices

Invoice ID	Name	Extension	Total Amount	Status Reason	Created On ⬇

There are no records to display.

5. **Invoices-** Invoices created for the extensions relating to this service are displayed here.

Deception / Fraud

Approved Extensions

Extension ID	Name	Total Amount	Status Reason	Created On ⬇	
EXT-01132-L6Q7C3	Sammy Extension	$6,360.00	Approved	9/11/2022 8:37 PM	⌄

Requested Extensions

Request Extension

Extension ID	Name	Total Amount	Status Reason	Created On ⬇

There are no records to display.

Invoiced Extensions

Extension ID	Name	Related Service	Total Amount	Status Reason	Created On ⬇

There are no records to display.

Invoices

Invoice ID	Name	Extension	Total Amount	Status Reason	Created On ⬇

There are no records to display.

Part 5: Extensions

Overview

Portal users can request an extension for a service. The extension can either be approved or refused. If the extension is refused, the portal user can request a reconsideration and enter the reason for reconsideration.

Extensions can only be requested from within a Service. They cannot be requested independently.

Request Extension

An extension can only be requested from within a Service on the portal. To request an extension, do the following

1. Locate and open the Service Record.

2. Go to the Requested Extension Section

3. Click on the Request Extension Button to open the Pop up Create Extension Form

4. Enter the **Extension Name** (Mandatory)

5. Enter the **Next Court Date**

6. Enter **Why is this Necessary** if applicable

7. Enter **Prospects of Success?** If applicable

8. Click on **Submit**

9. Upon saving the record, the Extension main form is displayed. As shown below. Work Types and Notes can be added to the extension and then saved. The created extension is also automatically added to the CSU Decision Queue for review and approval.

General

INFORMATION

Extension ID *

EXT-01136-K2V3W8

Name *

New Request for additional days

Related Service

Dan Brown_SER-01450_Referred

DESCRIPTION

Next Court Date

9/14/2022

Why is this necessary?

To attend court

Prospects of success?

Very Likely we will get an adjournment for the case

Extension Request Status

Status Reason

New

Extension Items

Add Work Type

Product Name	Unit	Price Per Unit	Quantity	Extended Amount

There are no records to display.

Total Amount

$0.00

TIMELINE & ATTACHMENTS

Note Text

3 minutes ago   See attachment for reason for request
Steve Manny

Affidavit.docx (52.52 KB)

Add note

Save

10. To **Add Work Type,** Click on Add Work Type Button to open the pop-out form

11. On the Existing Product Field search and select the required Work Type and then click on **Select**

12. Enter the required **Quantity** (Mandatory) and click on Submit

☑ Create   ✕

Existing Product			Unit	
Additional day	✖	🔍	Per Day	🔍

Quantity *

1

Price Per Unit

1200.0000000000

Amount

—

Extended Amount

—

Submit

13. The Extension Items is updated the Work Type Selected

Extension Items
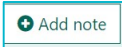
Add Work Type

Product Name	Unit	Price Per Unit	Quantity	Extended Amount	
Additional day	Per Day	$1,200.00	1.00000	$1,200.00	⌄

Total Amount

$1,200.00

14. Click on **Save**

15. On the Submit Validation dialogue box, click on **OK**
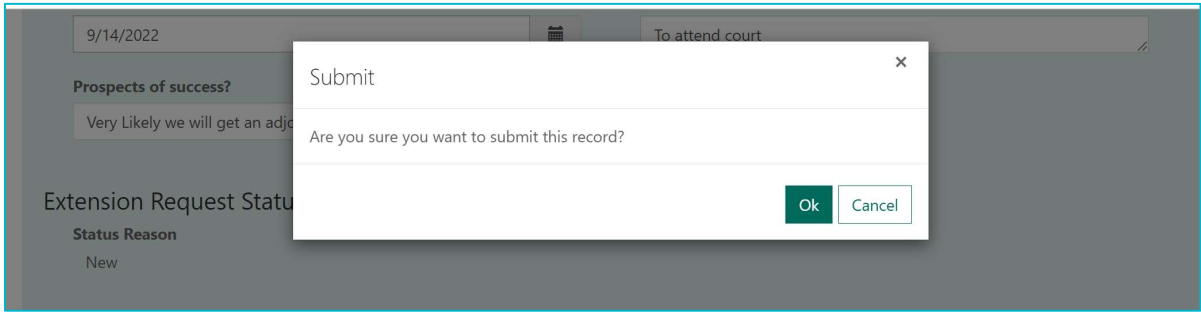
16. Notes and attachments can be added to the extension by clicking [+ Add note] on TIMELINE & ATTACHMENTS. On the pop-out form enter the note and add a file
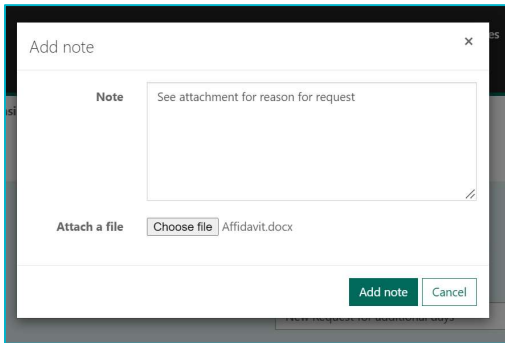
17. A note can be edited by selecting the down arrows beside the note record and clicking on edit to open the form
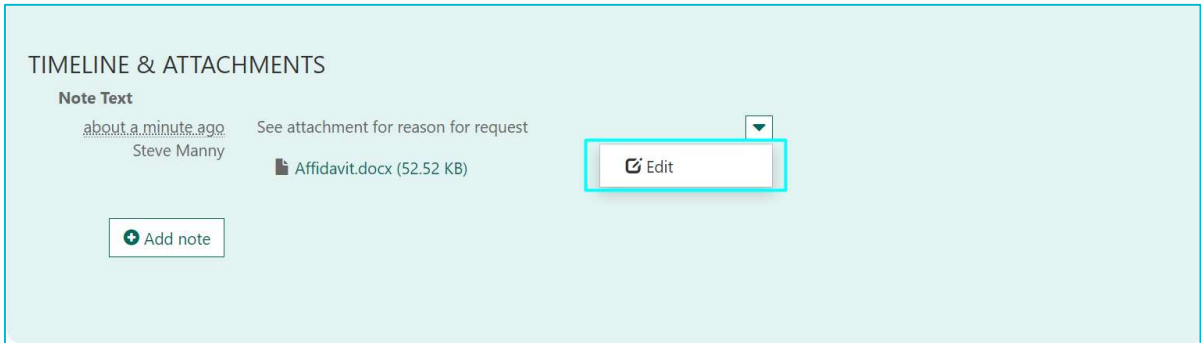
18. Click on **Save** to save any changes.

*Please Note! All requested Extensions will be in the **Extensions - New** View*

Request a Reconsideration

Requested Extensions by Portal Users may be refused by the Client Service Unit (CSU) Approver. If the extension is refused the Status Reason will be updated to **Refused (Open to Reconsideration**) and the Reason for Refusal indicated on the Extension, giving the Portal User, the opportunity to request a Reconsideration

Refused Extension(s) can be viewed from within the Assigned Service record or the from the Requested Extension view on the Extension tab.

To Request a Reconsideration

1. Open the Extension to View **Reason for Refusal**

2. Select Reconsideration on the **Update Requested Extension Action**
a. *Reason for Reconsideration displays*

3. Enter the **Reason for Reconsideration**

4. Click on **Submit**

Extension Request Status

Status Reason

Refused (Open for Reconsideration)

Reason For Refusal

REF

Refusal Code Description

Refusal Category

Refusal (Standard)

Refusal Clause Explanation

Client: Eligibility for Legal Aid is determined by either the Commonwealth Government's Guidelines or by our Commission's Guidelines. We look carefully at your financial eligibility, the merits of your case and whether it complies with requirements of the Legal Aid Act. Taking in to account these guidelines, your application has been refused for the following reasons:

Sol: Eligibility for Legal Aid is determined by either the Commonwealth Government's Guidelines or by our Commission's Guidelines. We look carefully at your clients financial eligibility, the merits of your case and whether it complies with requirements of the Legal Aid Act. Taking in to account these guidelines, your client's application has been refused for the following reasons:

Extension Request Actions

Update Application Status

Reconsideration

Reason for Reconsideration

I need this extension to provide adequate service. Please reconsider

Please Note! Portal Users must Withdraw the Extension if they do not wish to request a review of the Reconsideration

Request a Review

Portal Users can request a review of a refused reconsideration request.

To request a review, do the following

1. Select Review from **Update Application Status**

2. Enter Reason for **Requesting a Review**

3. Click on **Submit**

Part 6: Invoicing

Overview

Portal users can raise an invoice for an approved extension from within the Extension record. Invoices cannot be raised independently. The approved extension cannot be edited.

Raise Invoice

To raise an invoice for an approved extension, do the following

1. Locate and open the Approved Extension Record.

2. Go to the bottom of the record and click on **Raise Invoice**

3. Once the Invoice is Created the Invoice View Open

4. The initial status reason is Incomplete (indicating the invoice must be certified and tax review before it can be submitted for processing.

5. Click on the Invoice ID or select Edit on the down arrow beside the invoice record to open the created invoice.

6. Review the created invoice
   Note!
   a. *The amount to be Claimed defaults to the **Approved Amount***
   b. ***GST** is defaulted to **Yes***
   c. *Tax is 10% of the **Amount to be Claimed***

General

Invoice ID *		Client *	
INV-01138-Q8R5K3		Dan Brown	
Name *		Related Firm *	
Sammy Extension		Australia Law Firm	
Related Extension		Services	
Sammy Extension		Dan Brown_SER-01450_Referred	

ITEMS

Product Name	Unit	Amount	Amount to be Claimed	Include GST?	Tax	Extended Amount	
Appeal from the Family Court/FMC - Single Judge	Fixed	$3,240.00	$3,240.00	Yes	$324.00	$3,564.00	⌄
Appeal from the Family Court/FMC - Single Judge	Fixed	$1,670.00	$1,670.00	Yes	$167.00	$1,837.00	⌄
Appeal from the Family Court/FMC - Full Court	Fixed	$1,450.00	$1,450.00	Yes	$145.00	$1,595.00	⌄

Detail Amount

$6,360.00

(+) Total Tax

$636.00

Total Amount

$6,996.00

☐ I Certify that the above work has been completed and the payment for the work have been claimed in accordance with the Legal Aid Act and Practice Standards and I understand that files and documents may be audited by Legal Aid ACT.

Timeline & Attachments

Note Text

There are no notes to display.

⊕ Add note

Submit

7. Notes and attachments can be added to the Invoice using the **Add Note** button

8. The record must be certified before it can be submitted (Save) after it has been created. The Submit button is greyed out until the Certify attestation is ticked.

9. The invoice Amount can be adjusted based on the Amount to be Claimed. To charge a different amount from what was approved. Click on the down arrow beside the line items and select Edit to open the invoice item

10. Enter the value you wish to invoice for the item into the Amount to be Claimed field.
    a. Do if Include GST? Is ticked, the Tax calculates automatically (10% of the Amount to be Claimed)

    b. Do if Include GST? Is not ticked, the Tax is 0

c. You cannot enter a value greater than the approved amount

11. Click on Submit to save the changes and return to the Invoice Record.

12. Click on the Certify Attestation and click on Submit