



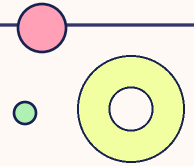
Claiming in Lookout: Session 2

Addressing your most common claiming questions with our SMEs



Live Webinar: 20 May 2026

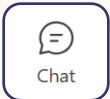
Housekeeping



Session is being **Recorded** and the recording with the slide deck will be shared with you post webinar.



Mute When Not Speaking: Please keep your microphone muted to minimise background noise for the group.



Use **Chat** for Quick Inputs: Share brief comments or reflections in the Chat as we move through the content.



Questions: Please add any questions to the **Q&A** panel throughout the session.

We will address questions in chat where possible or note them to address in next week's Q&A session.



We're unable to show a live PRODA-connected or customer environments due to privacy constraints (PII), however, we will walk you through the scenarios and answer your questions as clearly as possible.

Welcome

Session 2 of 3

Today's focus:

- Address your pre-submitted questions focused on billing runs, claim file generation and submission, amendments to unclaimed invoices

Next week:

- Continued Q&A based on your pre-submitted questions including clarification on amendments and adjustments for claimed invoices



Finance SME: Brad Lo Giusto
Customer Education Specialist



Product SME: Emma Taylor
Product Design Director

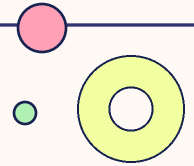


Facilitator: Luis Ramirez Nossa
Customer Success Lead



Facilitator: Joti Kaur
Training Operations Lead

Question 1



What is the difference between account transactions and credit notes?

Why can I not use account transactions any more to correct variances?

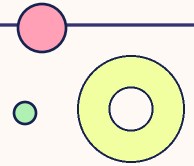
Answer

Under Support at Home, account transactions no longer meet the required level of detail and compliance, as claims must include service codes, invoice-claim numbers etc.

As a result, Lookout has restricted the use of account transactions to the Client Contribution account (SAH) only.

Where they are used to record member payments for client contribution, to align with your external finance system reconciliation.

Question 2



Can credit notes be added directly to a purchase order, or must they be entered via 'Invoices and Credit Notes', including when an invoice hasn't yet been published?

Wanting visibility altogether on the PO ticket for Care Partners to see the credit note has been actioned and which lines the credit note applied to.

Answer

No – credit notes cannot be processed directly on a purchase order.

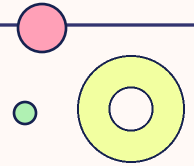
For **unpublished** PO line items:

- Document the credited or cancelled items in discussion notes
- Delete the PO line item to remove the entry

For **published** invoices:

- Raise a credit note via Invoices and Credit Notes
- Document the action in the PO discussion, and even link the credit note in the discussion

Question 3



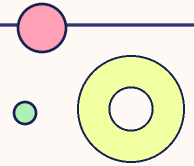
At what point should a discharged member be archived, and how does archiving affect invoice creation and claim eligibility?

Further, what drives the invoice appearing in the claim screen to be included within a claim; Issued on date, Service Delivery date, Transaction date?

Answer

- Archiving does not prevent manual invoices (ad hoc or PO-matched), and service delivery dates can extend beyond the archive date
- Visits cannot occur beyond the archive date and must be cancelled during archiving
- Claim eligibility is unchanged — based on published status, claim flags, and the 60-day claim window

Question 4



What is the best practice for filtering and organising claims to submit smaller categorised claims?

For example, when working with large claim volumes (e.g. 7000 invoice lines), how can you effectively sort or categorise invoices in the claim preparation screen to submit only selected services, such as visits or Assistive Technology?

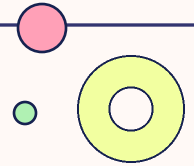
Answer

You can manage large claim volumes by using the available filters in the claim preparation screen:

- Membership
- Categories
- Communities
- Invoice Category
- Keyword search

Additional filters include date range, invoice description, and invoice ID to further refine results.

Question 5



If I identify a variance during reconciliation, how do I fix it before submitting the claim?

When I have uploaded the payment determination file and I complete my review for step 3, what options do I have to fix a variance before finalising in step 4?

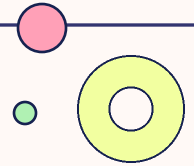
Answer

Once you reach step 3, the payment determination file is already issued from Services Australia, so no changes can be applied to that file.

Instead:

- Document variances identified
- Raise adjustments in the Services Australia portal
- Complete step 3 to align Lookout with the payment determination
- Then proceed to step 4 – finalise the claim, to post account transactions and update member statements and client contributions

Question 6



After a claim is finalised, what is the recommended reporting approach for billing client contributions, and how should payments be managed once received?

For example, how should reports such as Client Contribution account (SAH) transactions be used to track invoices and payments, and is there an expected relationship between invoice reporting and transaction reporting (e.g. government contributions vs client contributions)? What should be kept aligned or reconciled in this process?

Answer

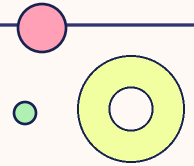
For client contributions, there are two key Data Exporter categories to build your reporting from:

- Transactions
- Account Charges

These reports can be used to export values into your external finance system to bill members.

Once payments are received, they can be imported back into Lookout via account transactions (or bulk account transaction journals), using the Client Contribution account (SAH).

Question 7



If I have a published invoice from a third-party supplier which was incorrectly entered, how can I adjust this before claiming to ensure the correct claim amount is submitted?

For example, physiotherapy at home session where the PO did not capture a resistance band, but invoice was processed, effectively undercharged to the member?

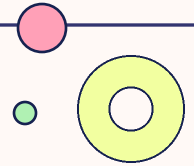
Answer

In this scenario, where the invoice is not yet claimed to Services Australia, you have the ability to amend the Lookout Way invoice to reverse the total original incorrect amount via a credit note. The correct total amount can either be raised as an ad-hoc invoice or by updating the PO line items to reflect the corrected total and match the invoice to these line items.

Considerations:

- Exclude original invoice and credit note from claim
- Has the invoice been exported from Lookout for your AP supplier payment?

Question 8



If I have a completed visit which was incorrectly acquitted and is published, how can I update the checkout before claiming to ensure the correct claim amount is submitted?

For example, an internal helper attended on Monday for scheduled 15-min medication support, but recorded checkout time as 30-minutes. Investigated and found the helper only stayed for 15-mins, how can we amend?

Answer

In this scenario, where the invoice is not yet claimed to Services Australia, you have the ability to amend the Lookout Way invoice to reverse the total original incorrect amount, via a credit note, then either raise an ad-hoc invoice or roster a new visit to reflect the corrected check out time.

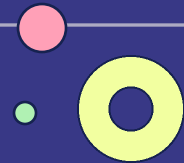
Considerations:

- Exclude original invoice and credit note from claim
- Has the shift been exported as for payroll?



Reminder

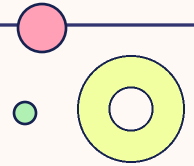
Submit your questions for the next session



Next Steps

Remaining questions carried into Session 3

Resources



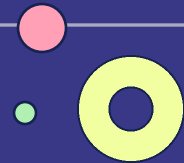
Support Articles:

- [Billing Runs](#)
- [Generating your first Support at Home Claim](#)
- [Reconciling your Support at Home Claim](#)
- [Client Contributions and Support at Home](#)
- [Support at Home Statements](#)
- [Excluding from Claiming](#)

Videos:

- [Invoices, Credit Notes and Billing Runs](#)
- [Support at Home Claiming](#)





Thank you