



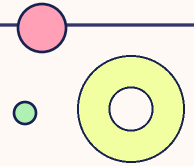
Claiming in Lookout: Session 3

Addressing your most common claiming questions with our SMEs



Live Webinar: 27 May 2026

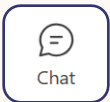
Housekeeping



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



Attendees on Mute: 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 3 of 3

Today's focus:

- Address your pre-submitted questions focused on amendment and adjustments for claimed invoices

Next steps:

- Q&A Support article: including many of your submitted Qs.
- Recordings and slides sent to you to share with your teams.



Finance SME: Brad Lo Giusto
Customer Education Specialist



Product SME: Emma Taylor
Product Design Director

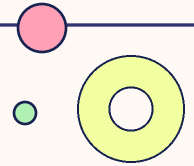


Facilitator: Luis Ramirez Nossa
Customer Success Lead



Facilitator: Joti Kaur
Training Operations Lead

Question 1



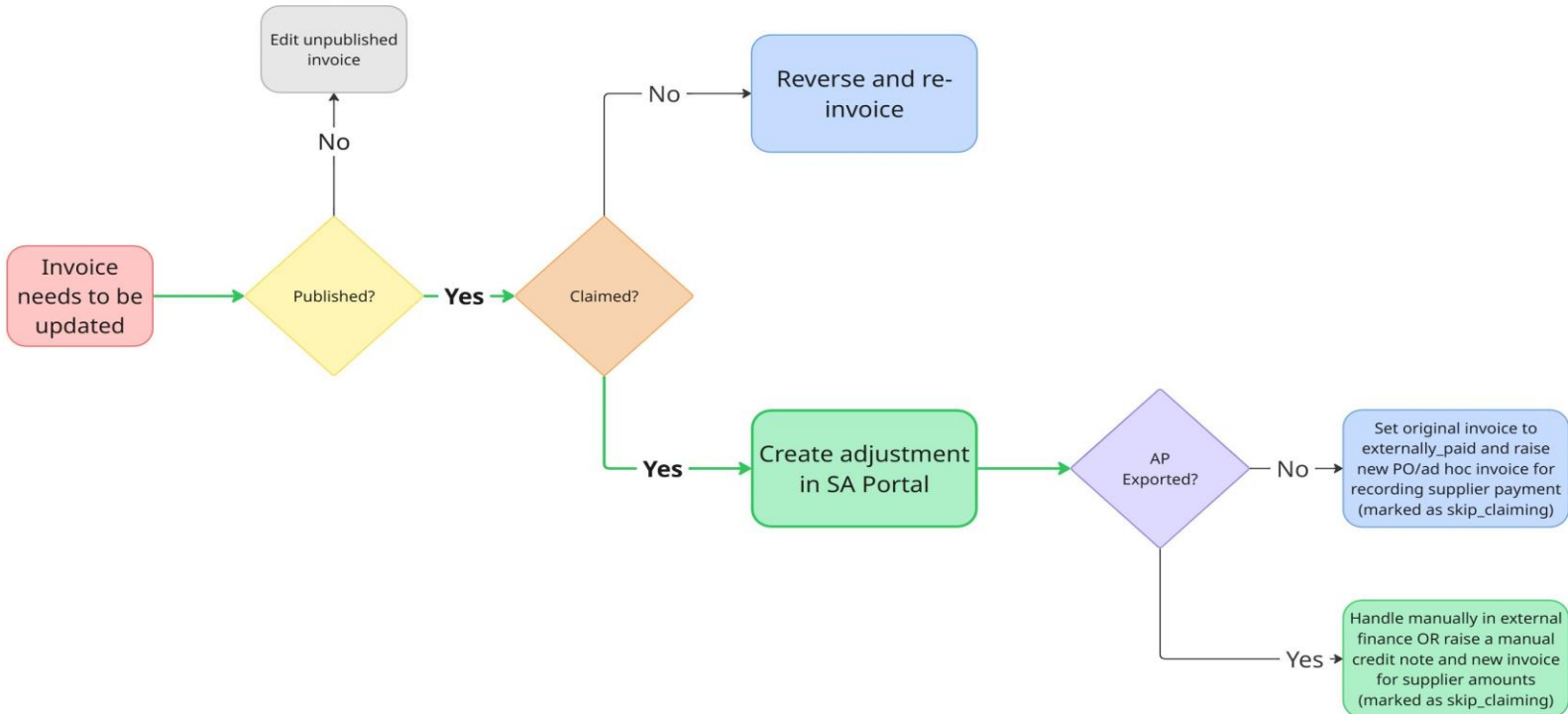
We've already claimed an invoice in April, but the supplier has now issued a credit note. What process do I need to follow in Services Australia (ACPP) and Lookout to ensure member statement and client contribution are accurate for May?

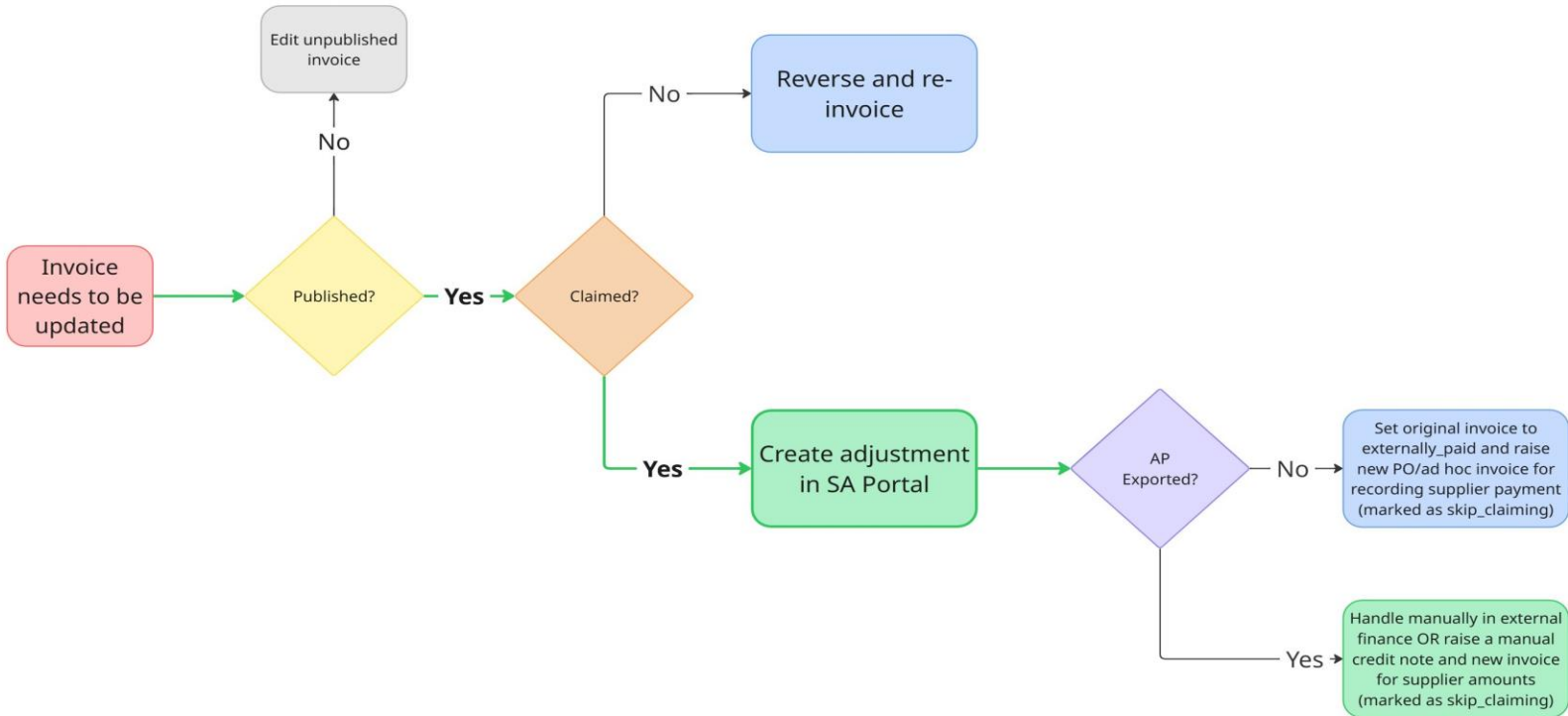
Answer

This process applies to adjustments for overcharges (including credit notes and partial credits) and undercharges on invoices that have already been published and claimed.

1. Locate the invoice in Lookout – Find the invoice to obtain the Invoice ID and identify the original claim it was submitted under.
2. Submit a manual amendment in Services Australia (ACPP) – In the portal, amend the original invoice to reflect the correct amount:
 - a. Credit note / partial credit (overcharge) – reduce the invoice value accordingly.
 - b. Undercharge – increase the invoice value to the correct amount.
3. Wait for processing

Once processed, the updated invoice lines will appear in your payment determination.





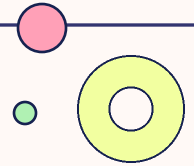
Statement View

Adjustments or refunds from prior funding periods

Charges for services or items delivered in a previous funding period. These items are not included in totals in the summary section above.

Date & time	Service	Unit	Qty	Unit cost	Total cost	Gov. subsidy	Contribution
Mon, 10 Nov	Third Party Supplier: Allied Podiatry 10/11/2025 <i>Podiatry (SERV-0028)</i>	Item	1.0	-\$120.00	-\$120.00	-\$120.00	\$0.00
Totals					-\$120.00	-\$120.00	\$0.00

Question 2



We've claimed an invoice but realised the service was charged to the wrong funding source. How do we correct this?

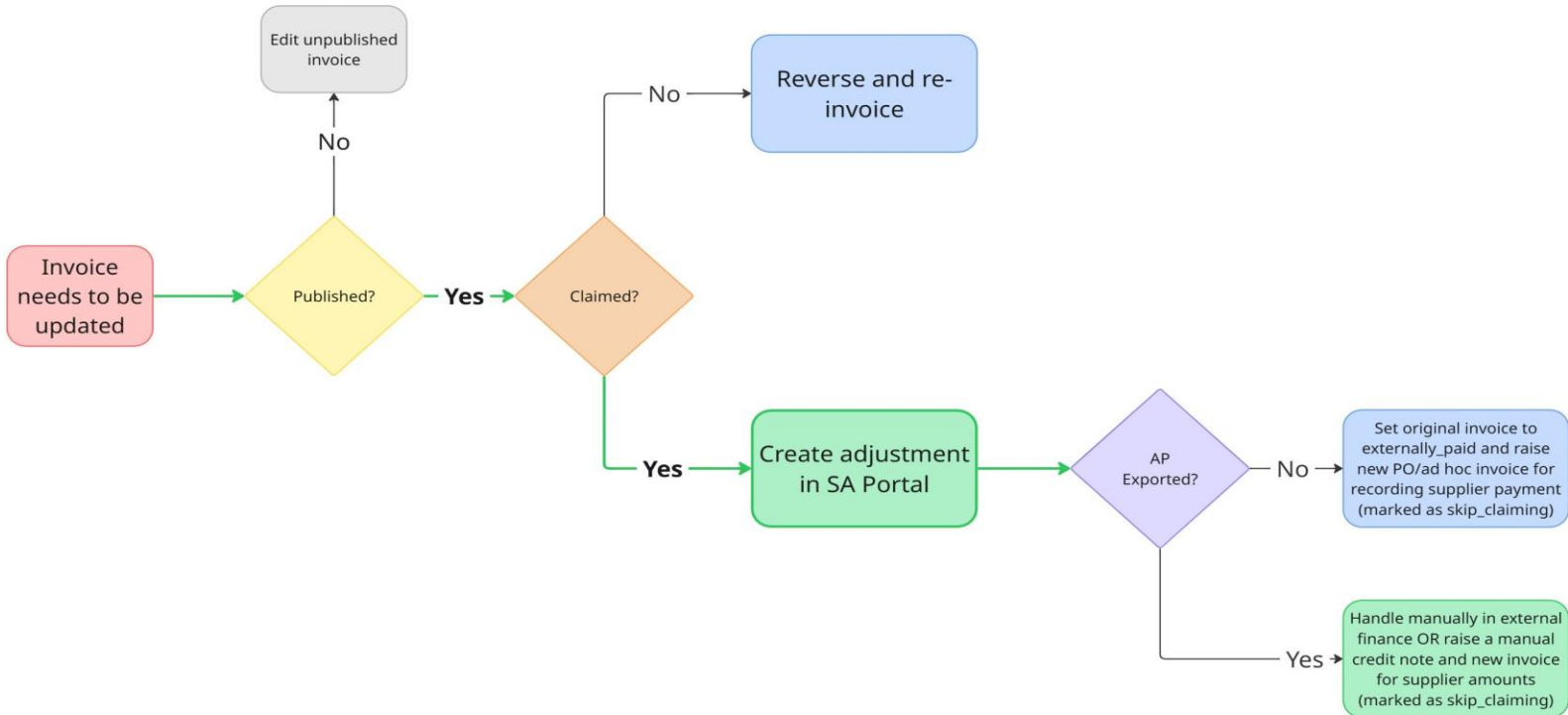
For example, claiming for continence aids, but accidentally claimed them under AT-HM instead of ongoing.

Answer

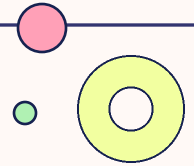
The service code itself determines which funding bucket the charge draws from. For example, AT-HM services use a separate service list, whereas clinical services would typically draw from ongoing/RC/EoL funding. Because of this, it's important to ensure the correct service code is selected before claiming.

Before submitting a claim, you can edit the invoice service code and funding source in the claiming screen before generating the CSV.

If the invoice has already been claimed, you will need to complete a post-claim adjustment through the Services Australia ACPP portal to correct the original claim. These adjustments will flow through to Lookout the next time you upload a payment determination to correct the Member's accounts. If you're unsure what to do, contact Services Australia.



Question 3



If an invoice is backdated after we've already completed a billing run and claim, how do we ensure it gets picked up in the next claim?

For example, Purchase Order or Case Management time tracking.

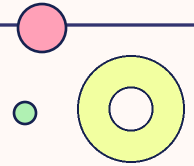
Answer

The Support at Home claim is based on invoice Service delivery date, not the Lookout Way Invoice Issued/Created On date.

When you backdate an invoice, ensure that the Service delivery date is accurate for the service or item provided, then once the invoice is published, you will see the line items in your Support at Home claim screen organised by Service delivery date.

Keeping in mind the 60-day funding quarter deadlines that Services Australia sets, which will prevent you from claiming unless you raise a form with Services Australia notifying them of the late submissions.

Question 4



When reversing an invoice, how do we distinguish between credit notes that need to be processed in PRODA versus those that are simply offsetting an invoice already excluded from claiming?

Answer

There is no tag or identifier in Lookout that is set when an invoice needs to be processed in PRODA for an amendment.

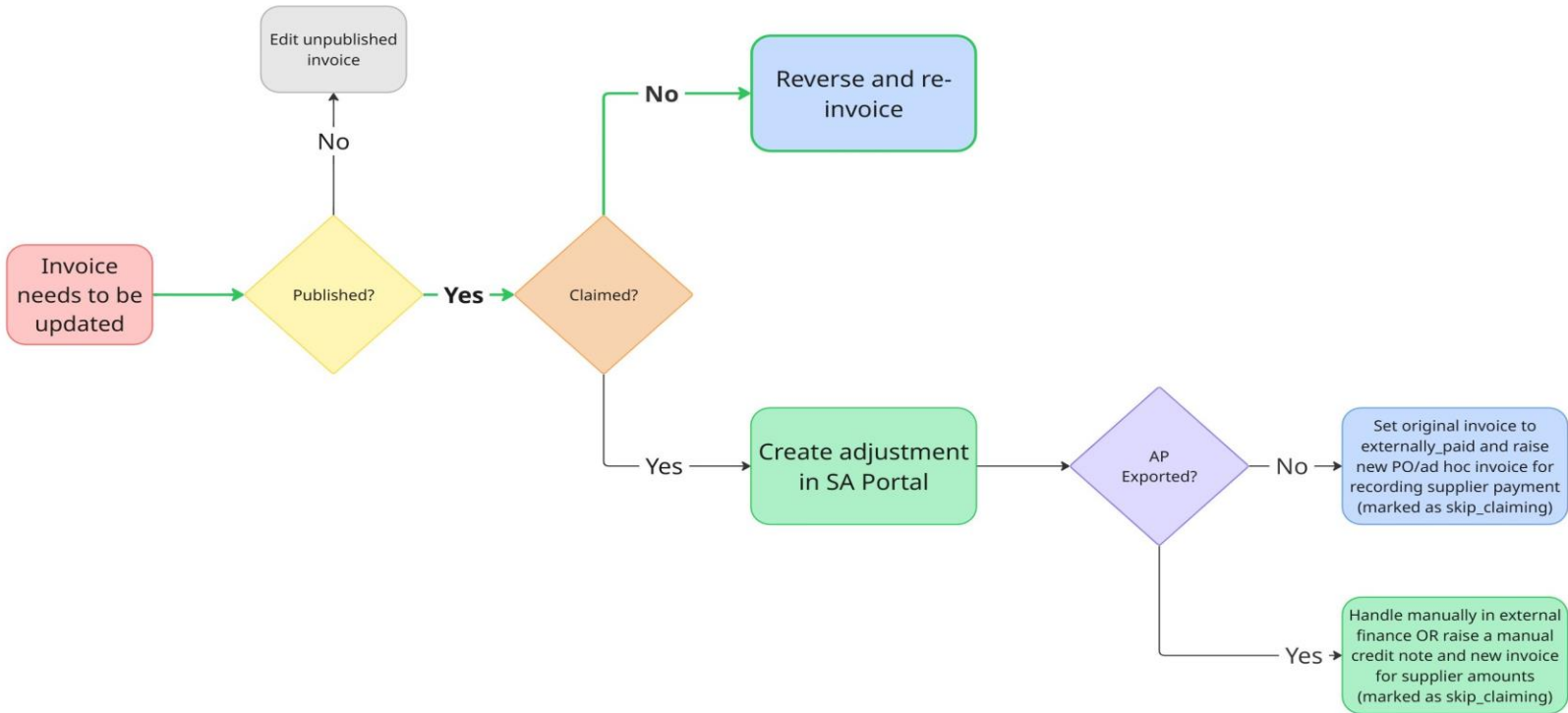
Unclaimed invoices:

- **No Services Australia** interaction required
- The reversal is completed in Lookout using credit notes
- You can optionally use the **reverse button** to copy the original invoice details and set the invoice to **excluded from claiming**

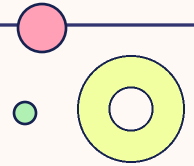
Claimed invoices:

- Requires **Services Australia (PRODA) adjustment**
- Credit notes and adjusted invoice are automatically created via the **Support at Home claim process**, not manually by user

When using the reverse function, any existing flags on the original invoice will carry over to the credit note. If no flags were set (e.g. excluded from claiming) then no flags will be set on the credit note raised.



Question 5



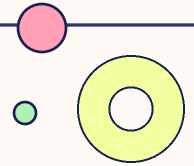
Once Services Australia has processed an adjustment and provided a new payment determination file, do I just complete step 2 to upload and reconcile this in Lookout?

Answer

There are two scenarios for Services Australia providing a payment determination file:

1. **Provider submitted claim** – this is your normal process where you export the claim file from Lookout, the government will process the invoices and return the payment determination file. **This file will also include any processed provider amendments or Services Australia adjustments that you have submitted for previous invoice amounts.**
2. **Services Australia adjustments** – this is a payment determination including no provider submitted invoices, but Services Australia has recognised mistakes in processing prior invoices. This is what you will have seen for Nov-Dec 2026 error for Home Care Account unspent funds incorrectly being charged when Home support ongoing funds were available. This is also how Services Australia has shared financial hardship adjustments.

Question 6



Can we use Account Transactions to directly reduce or waive a client's contribution amount?

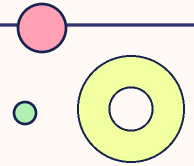
Answer

Yes, this is a great example of an account transaction that you can still enter for Support at Home members.

Recalling from Session 2, where we walked through the blocks that Lookout has put in place to prevent you from entering account transactions, since Support at Home requires more information for service codes than account transactions will allow.

The process for entering the account transaction to handle reduced fee or a total waiver will be exactly the same as if you were uploading a payment from the member. You can add a description tailored to this action which will appear on the member statement.

Question 7



If we create a credit note with a client contribution amount but permanently exclude it from the SAH claim, does it still create a transaction and credit the client's contribution account?

Answer

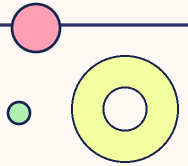
No, a credit note that you raise in Lookout, manually or with the reverse buttons, will never flow to account transactions.

Additionally, invoices/credit notes excluded from claiming don't proceed through the claiming flow which is the only way transactions get written to Member accounts (the last step when you finalise the claim is when transactions are created). **The Support at Home claim is the conduit for creating transactions to member accounts for Support at Home members.**

Since you cannot claim credit notes in the Services Australia portal, you will never create an account transaction for credit notes in Lookout. Instead recall the workflow for entering an amendment in the Services Australia portal if you need to report the change to the government.

If you are processing a provider reduced fee or waiver for the client contribution only, then you can use account transactions as per the previous question.

Question 8




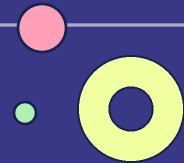
Can published invoices be reversed in bulk?

Answer

No, this is not currently a feature, but we have taken this onboard as a potential feature request.

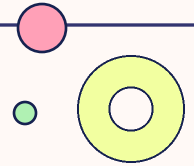
The only way to reverse an invoice in Lookout is through the single line reverse buttons on a published invoice, which creates a credit note dated with today's date and all of the original invoice details or by manually entering an ad hoc credit note.

Please note: currently reversing an invoice by clicking the  button will automatically exclude the original invoice from being claimed but it will not exclude the credit note from the claim screen. If you would like to exclude the credit note from claiming, you will need to manually edit the newly created credit note and mark it as "Exclude from claiming".



Thank you

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](#)

