

Passport eCLAIM webcast transcript

Host: Val Baravi, DSO Communications Specialist

Guest: Domenic Pisante, PassportONE Trainer for Family Service Toronto.

Val: Thank you for joining us today and welcome to Developmental Services Ontario's webcast, "Understanding the benefits of your Passport eClaim account." I'm Val Baravi, Communications Specialist for DSO, and I'll be your host this evening.

Before we begin, however, I have a number of housekeeping issues for you.

We will hold a Q&A at the end of the webcast, so I would encourage you to type any comments or questions into the chat box at any time.

Below the chat box are two tabs. A Resources Tab that will provide you with other resources and links you may find helpful and a Feedback Tab that links to a very short evaluation. We'd love your feedback on tonight's presentation.

If you experience any technical issues, quitting and relaunching your browser solves most issues. Failing that, there is a Tech Help Tab that provides other tips if needed.

In the studio with me today is Domenic Pisante, who is the PassportONE Trainer for Family Service Toronto. Welcome and thank you for joining us, Domenic.

Domenic: Thank you...

Val: Let's dive right into this. What is Passport eClaim?

Domenic: The Passport eClaim is a fillable PDF document that the Person Managing Funds can use to complete and submit their Passport claims without needing to email or fax in their claims. The person responsible for managing funding can login into a website, download their personalized Purchase of Service Invoice form, fill it out directly on their computer or device, and attach all of their receipts.

You know, so many times we hear from families who have misplaced their personalized forms, ran out of ink, or can't access the mail now due to COVID -this eClaim system means that a person responsible for managing funding can have access to their forms at anytime without needing to contact their local Passport Agency. Submitting an eClaim will also help with more timely reimbursements across the province.

Val: Can a person use the Passport eClaim account to apply for the Passport Program?

Domenic: No, this eClaim system cannot be used to apply for Passport Funding. Prior to using this system, a person needs to have been approved for Passport Funding and have an active person managing their funding.

Val: Before we go into the registration process, could you please let us know which operating systems and browsers does the Passport eClaim support?

Domenic: The eClaim system can be used on a number of different platforms and browsers including Chrome, Firefox, Edge, and Safari. The eClaim system cannot be used on Internet Explorer. Microsoft announced that Internet Explorer will not be available to much longer and cannot support the eClaim system.

| Operating System/Browser | Chrome | Safari | Firefox | Edge |
|---------------------------|--------|--------|---------|------|
| Windows 10 and up | ✓ | | ✓ | ✓ |
| MacOS 10.14 Mojave and up | ✓ | ✓ | | |
| Android 10 and up* | ✓ | | | |
| iOS 12.4.7 and up* | ✓ | ✓ | | |

Val: What kind of information does the client need to register an account?

Domenic: To register for the eClaim system, the person responsible for managing funds will need the client name and the client code. Which can be found on the Purchase of Service Invoice form you currently have, your funding documents or you can contact your Local Passport Agency to ask for your client code.

Val: Is the actual personalized eClaim form in PDF format?

Domenic: Yes, once registered the person responsible for managing funding can download their personalized Purchase of Service Invoice form in a PDF format and use it whenever they need to. They don't need to contact their local Passport Agency for forms anymore as everything they need to submit claims is available through the eClaim system.

Val: So once the client downloads and completes the form, will they be able to submit it electronically?

Domenic: Yes, that's one of the most exciting things about the eClaim system. The person responsible for managing funding can complete their personalized forms, attach the receipts, and submit it directly to PassportONE – all from the eClaim system.

Val: Will you still need the clients to mail their receipts or invoices?

Domenic: No, attaching the required receipts and invoices is all done through the eClaim system.

Val: Does the Passport eClaim affect, in any way, the existing Passport policy?

Domenic: The Passport eClaim system does not impact existing Passport Policy. The Passport Funding guidelines remain the same as well as eligible and ineligible expenses.

Val: Will the Passport eClaim allow the clients to monitor the status of their submissions?

Domenic: Yes, once the person responsible for managing funding starts completing a claim and when they submit their claim, they will be able to monitor the status of their submission directly on the eClaim system. The eClaim system will automatically notify the person responsible for managing funds that a claim is in process, has been reimbursed, or requires action. This can all be viewed directly on the eClaim system.

Val: Since the clients will now have access to their Passport eClaim account, will they be able to update their contact information through that account?

Domenic: No. A client will still need to contact their local Passport Agency to update any information such as their contact numbers, addresses, and banking information.

Val: Now I believe that you have a few screenshots to show us. So let's take a look at what Passport eClaim looks like.

Domenic: There will be a full end to end user manual available that people who are using the system can access at anytime to help them through the process registering to use the eClaim system, submitting a claim, and questions they may have about using the eClaim System.

Screenshots of the registration page and the Download, Attach, Submit page (demonstration).

Domenic:

Slide 1:

What you're seeing here is the registration page of the eClaim system. It's a very simple registration process – you'll only need the first name and last name of the Person Managing Funds, the Client Code, and the Client Name. It's very important that you use the same names that you wrote on your funding documents and that you have registered with the Passport Program. Once you have registered, you will receive a verification email to get started.

This page is also where you would come to log in once you have registered.

Slide 2:

Your individualized Purchase of Service Invoice form can be downloaded from this page here. It's a really simple process of downloading your Purchase of Service Invoice form and filling it out, attaching your receipts, and submitting it. If you were to change your address or any information with the Passport Program, your Purchase of Service Invoice form is automatically updated the next time you log in.

Slide 3:

When you are ready to attach your Purchase of Service Invoice form and receipts to PassportONE, you can come to the 'Submit' page and upload all of your files. Once you upload your files, they are submitted directly to PassportONE.

Slide 4:

The eClaim system allows you to log in and view your submission history whenever you like. This page tracks all of your submissions and lets you know in real time what is happening. As an example, this page will let you know if your claim has been processed or is currently review.

Val: Fantastic! A truly convenient and user friendly tool for Passport clients. Thank you Domenic, . It's been a pleasure having you here. And now, let's dive right into our Q&A session.