GOVERNMENT OF WESTERN AUSTRALIA

CTF

How To Guide

Create a Claim

or Multiple Claims

in the CTF Portal

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Who is this guide for?

This guide is for anyone who needs to:

- **Create a claim,** e.g., for yourself or for one or more employees**.**
- **Create multiple claims***, e.g., for three or more participants who completed the same training course at the same time.

*You will need our pre-formatted 'upskilling and short course funding bulk upload' spreadsheet to submit a claim for three or more participants. You can access this document in the claims dashboard in the portal. Alternately, you can email us at info@ctf.wa.gov.au

You cannot update a claim in the CTF portal. To do this, please email info@ctf.wa.gov.au and provide details of the changes you wish to make. Please make sure you include your claim number which will start with 'SUP' or 'SCH'.

Who can submit a claim?

You can submit a claim for yourself, or for an employee on behalf of an employer or company/business.

You cannot submit a claim for an employer grant through the CTF portal.
This includes funding for employing apprentices and trainees. To do this, please contact us at info@ctf.wa.gov.au or on (08) 9244 0100.

What can I claim for?

CTF supports and subsidises training for workers in WA's building and construction industry.

Through the portal, you can submit a claim for:

1) Upskilling and short course funding

If you or any of your employees complete a relevant training course, you may be eligible for a subsidy of up to 80% of the course cost.

This subsidy helps reduce training costs to ensure we have a skilled, sustainable construction workforce. Find out about eligibility criteria and available courses here

2) Scholarship program – the $250 pre-apprenticeship award

If you have successfully completed a qualification through our Pre-apprenticeship Scholarship Program, such as a Certificate II in Building and Construction, you may be eligible for a $250 completion award. Find out about more about our Pre-apprenticeship Scholarship Program here

3) Higher qualification

Trainees completing individual or component units of higher qualifications can apply directly to CTF for training subsidies.

The maximum subsidy available for successful completion of Certificate IV qualifications (or units completed within these courses) is:

- $1,300, where the units have been delivered in Perth metro, or
- $1,700, where the unit/s have been delivered in a regional area.

Through our Upskilling and Short Course Funding program, units within the following Certificate IV/Diploma courses are eligible for the subsidy:

- Certificate IV Work Health & Safety (formerly Occupational Health & Safety)
- Certificate IV Project Management Practice
- Certificate IV in Leadership & Management (previously Frontline Management)
- Diploma in Work Health & Safety (formerly Occupational Health & Safety)

- Diploma in Builder's Registration
- Diploma in Environmental Management

The subsidy is only available on the successful completion of each unit or component.

4) Recognition of prior learning (RPL)

This claim is to recognise the successful completion of an RPL or Skills Assessment process towards a recognised qualification. This usually occurs through an apprenticeship pathway. You may be eligible to claim up to $400 towards the cost of assessment. Find out more here

What you need to know about creating a claim

These instructions are for creating a single claim, i.e., one or two participants for a single course or course unit.

Creating a claim for one or two participants

- If one or two participants completed the same training on the same day, or completed the same course during the same period, you can submit *one* claim for *two* participants.
- During the claim process, input '1' or '2' when you are asked for the number of participants.
- For two participants, you will need to select each participant from the drop-down menu.

Creating a claim for three or more participants

- If three or more participants completed the same training course at the same time (upskilling and short course funding program), you can create a create a 'bulk claim upload'.
- During the claim process, you need to input the number of participants (3, 4, or more) and you will be prompted to upload the 'upskilling and short course funding bulk upload' spreadsheet.
- Please refer to 'Create multiple claims for upskilling and short course funding (bulk claim upload)' on page 20.
- You can *only* create a bulk upload for upskilling and short course funding claims, not any other claim types.

You should only lodge a claim after the training course has been successfully completed.

You can expect to receive your claim payment within 30 days of submitting all required information.

Create a single claim

Follow these instructions to create a single claim for one or two participants who completed the same training at the same time.

1) Before you get started, make sure you have all the information you need.

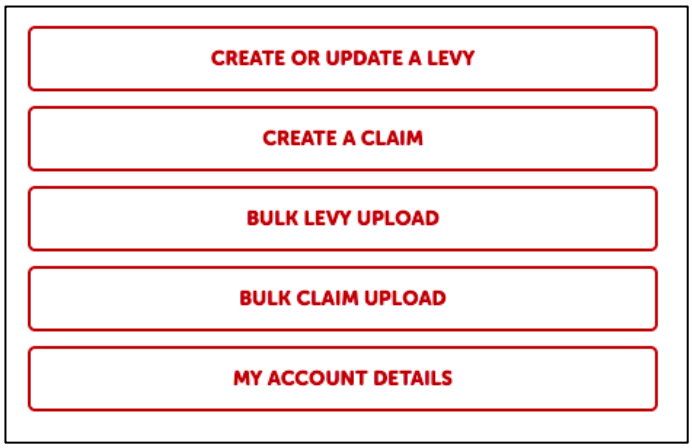
This includes:

- **Course details** (course name, dates, cost including GST)
- **Participant details** (name, email address, date of birth)
- **Information regarding job sites** the claim participant was working on just prior to the date of training (job role, site address, description of works happening at that site)
- **Copy of the paid invoice** or receipt from the training provider
- **Certificate or Statement of Attainment** proving course completion

2) Navigate to the CTF portal at www.ctf.wa.gov.au

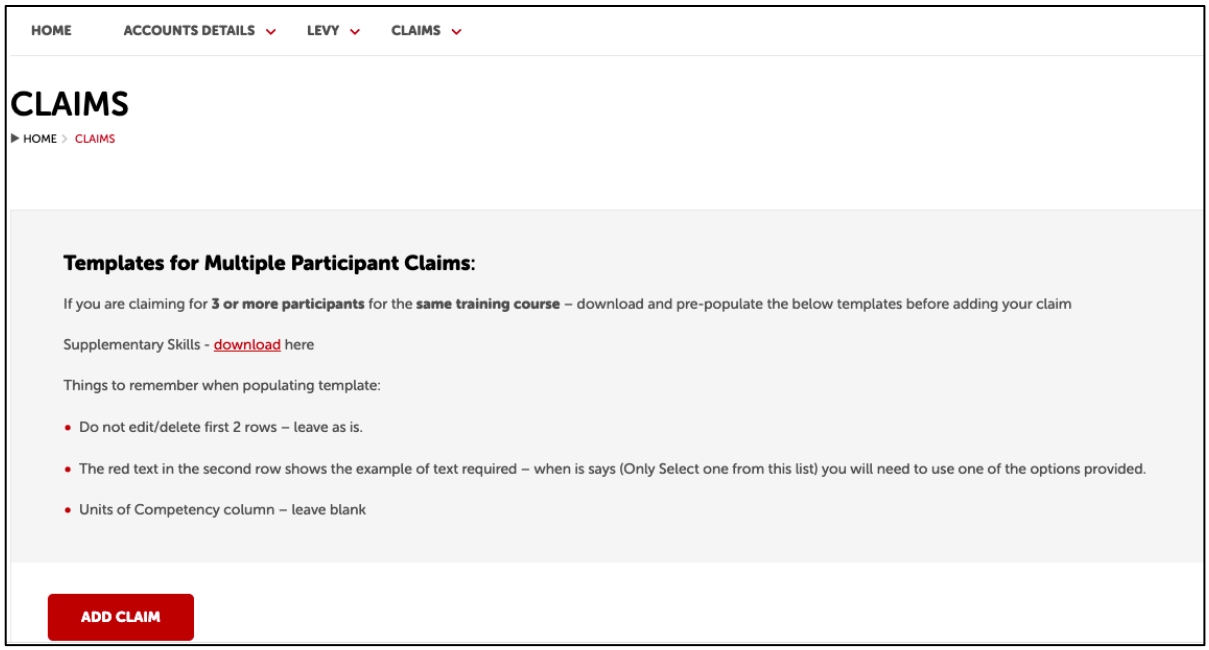
- We recommend using Google Chrome for best functionality.
- Login with your registered details.
- If you have not registered on the portal before, please refer to the instruction in our 'How to guide – CTF portal registration'.

3) Once you are logged in, click 'Create a claim'.



4) The claims dashboard will appear.

- You do not need to use a template if you are submitting a single claim. Disregard the information in the grey box.
- Click 'Add claim' (red button).

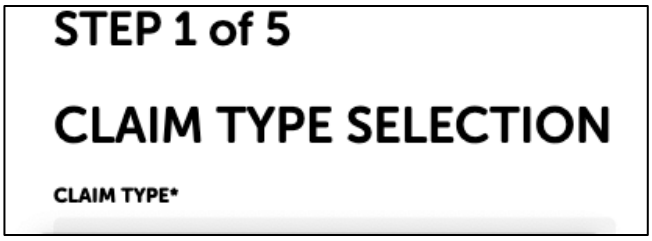


Claim the upskilling and short course funding subsidy

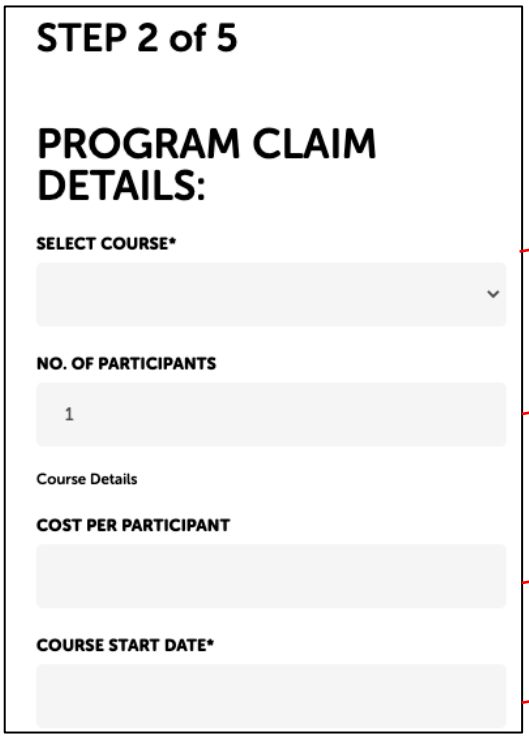
This is where one or two participants have completed a relevant building and construction short course. The claim must be submitted within 12 months of successful course completion.

For three of more participants, please refer to 'Create multiple claims for upskilling and short course funding (bulk claim upload)' on page 21.

1) Select the 'Claim type' from the drop-down menu. Click 'Next'.



2) Complete the course details.



Select course – choose from the menu. If you can't find your course, please contact us.

No. of participants – you are claiming for (completed the same course, the same day).

Cost per participant – course cost including GST. Exclude Worksafe and/or admin fees.

Course start date – use the official start date.

Course end date – use the official end date.

Duration in hours – the total course hours (should be provided in the course outline).

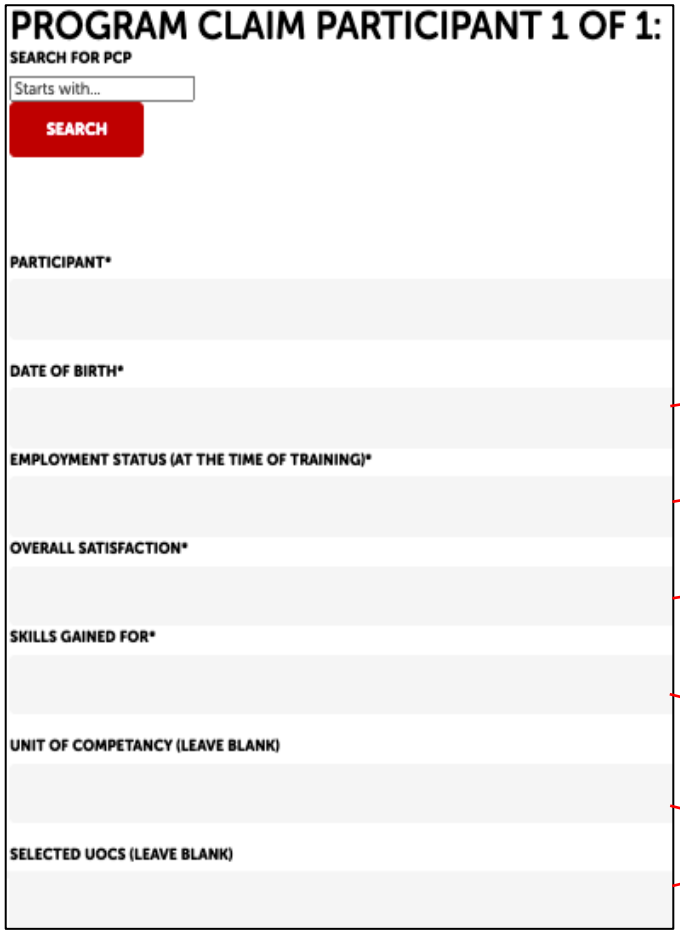
Training provider – choose from the list. If your provider isn't listed, select 'training provider not listed'.

Training suburb – the suburb where the participant undertook the training.

Employer satisfaction – with the course. Choose from 1 (low) to 5 (high).

3) Complete participant details.

- If you are lodging a claim for yourself, select your name from the 'Participant' drop-down menu.
- If you are lodging a claim for one or two employees, select their name/s from the 'Participant' drop-down menu.



Date of birth – scraped from your record.

Employment status – choose from menu.

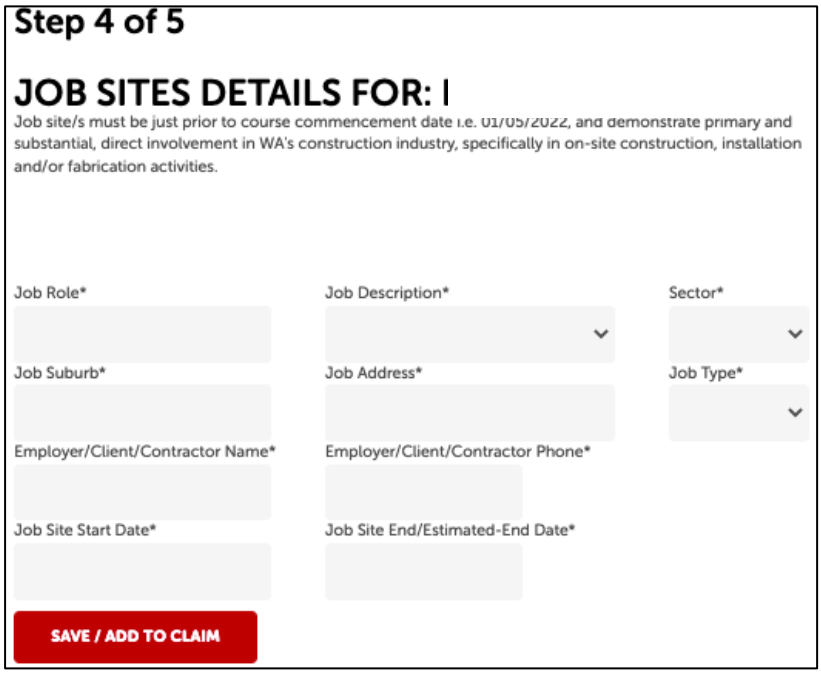
Overall satisfaction – the participant/s satisfaction with the course (if known).

Skills gained for - choose from the drop-down menu.

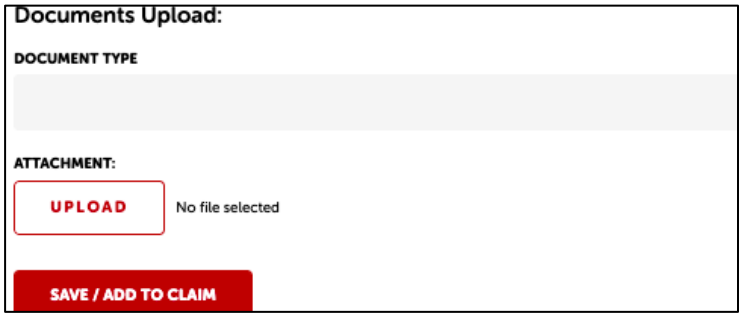
Leave these two fields blank.

4) Complete your work details just prior to starting the course.

- Provide *five days* of your job site history information in the month prior to your training.
- If the participant attended one site per day, please provide five sites to satisfy the five days of job site history information.
- Click 'Save/Add to claim' before proceeding to the 'Documents upload' section.



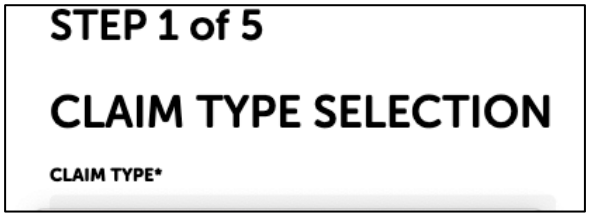
- **Upload evidence of your course payment and successful course completion.**
- *Before uploading your documents*, make sure the document name doesn't include any special characters (!, #, _, etc). The document name must have letters and numbers only.
- For 'Document type', choose 'Paid Invoice/Receipt' or 'Statement of Attainment/Certificate'.
- Click the white 'Upload' button and find the relevant document on your device.
- Click 'Save/Add to claim'. Scroll down - you will see the document has been added to your claim.
- Repeat this process again to add all relevant documents to your claim. Click 'Next'.
- *Please note*, a bank transfer receipt or screenshot *will not be accepted* as proof of payment. The paid invoice/receipt from the training provider (RTO) must be provided.



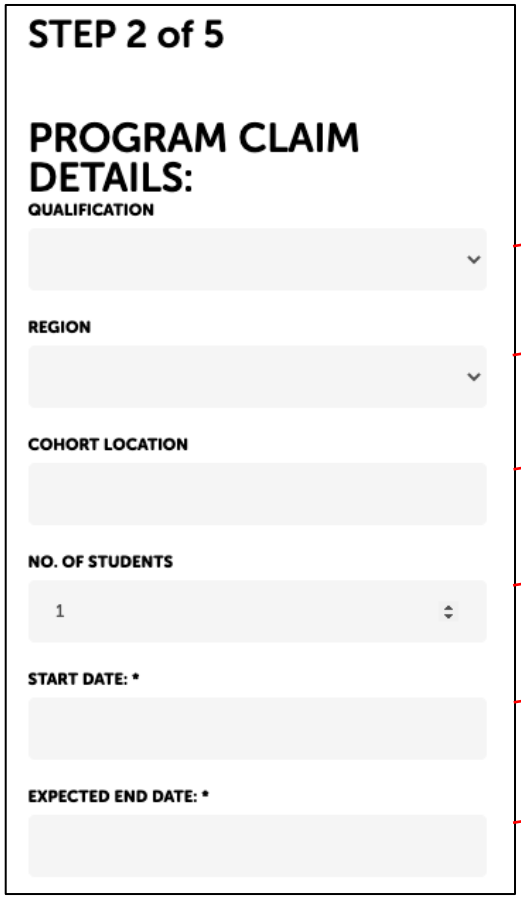
Claim the scholarship program ($250 pre-apprenticeship award)

This is for claiming the $250 award on the completion of a pre-apprenticeship qualification. This is applicable to students in Year 11 or Year 12 who have completed a relevant Certificate II.

1) Select the 'Claim type' from the drop-down menu. Click 'Next'.



2) Complete course details.



Qualification – choose from the drop down menu.

Region – choose from the drop down menu.

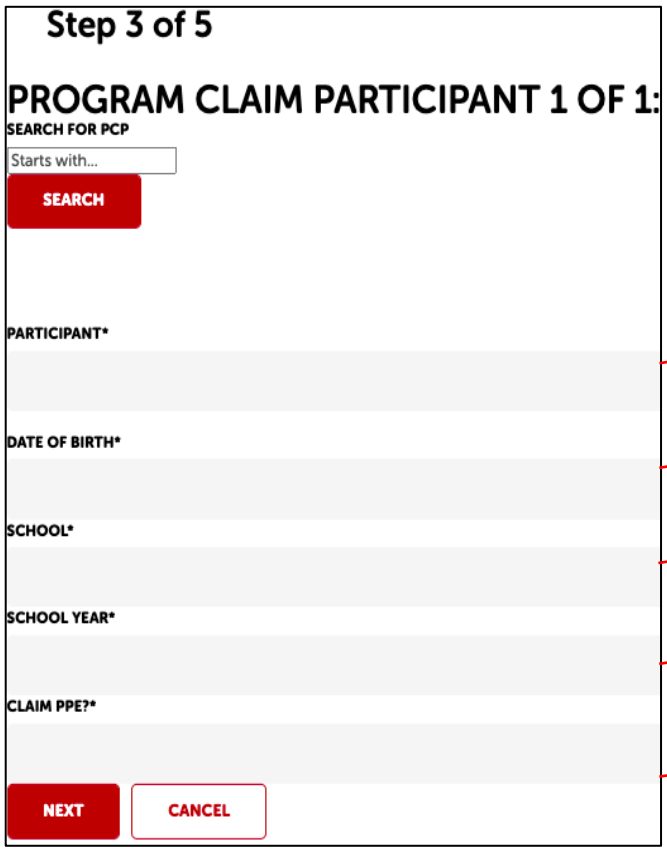
Cohort location – please input *n/a*.

No of students – that you are claiming for who completed the same course on the same day.

Start date – the official course start date.

Expected end date – the official course end date.

3) Complete the program details for the participant.



Participant – choose name from the drop down menu.

Date of birth – this may be scraped in automatically.

School – select the participant's school from the menu.

School year – select Year 11 or Year 12.

Claim PPE? – if you are claiming PPE expenses as part of the course cost.

4) Upload evidence of your course payment and course training plan.

- *Before uploading your documents*, make sure the document name doesn't have any special characters (!, #, _, etc). The document name must have letters and numbers only.
- For 'Document type', choose 'Template training plan 'or 'Resource fee invoice'.
- Click the white 'Upload' button and find the relevant document on your device.
- Click 'Save/Add to claim'. Scroll down - you will see the document has been added to your claim.
- Repeat this process again to add all relevant documents to your claim. Click 'Next'.
- *Please note*, a bank transfer receipt or screenshot will not be accepted as proof of payment. The paid invoice/receipt from the training provider (RTO) must be provided.

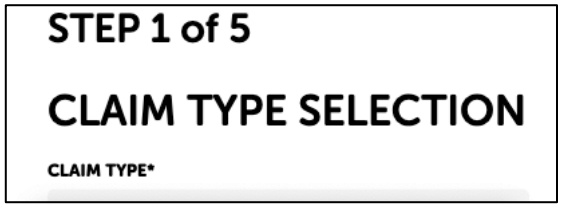
5) **Read and accept the declaration by ticking the box, then click 'Submit'.**

6) **On submission, you will receive a confirmation message with your claim reference number.**
   - Keep this claim reference number on file. You will need to quote it if you need to contact CTF for any assistance with your claim.

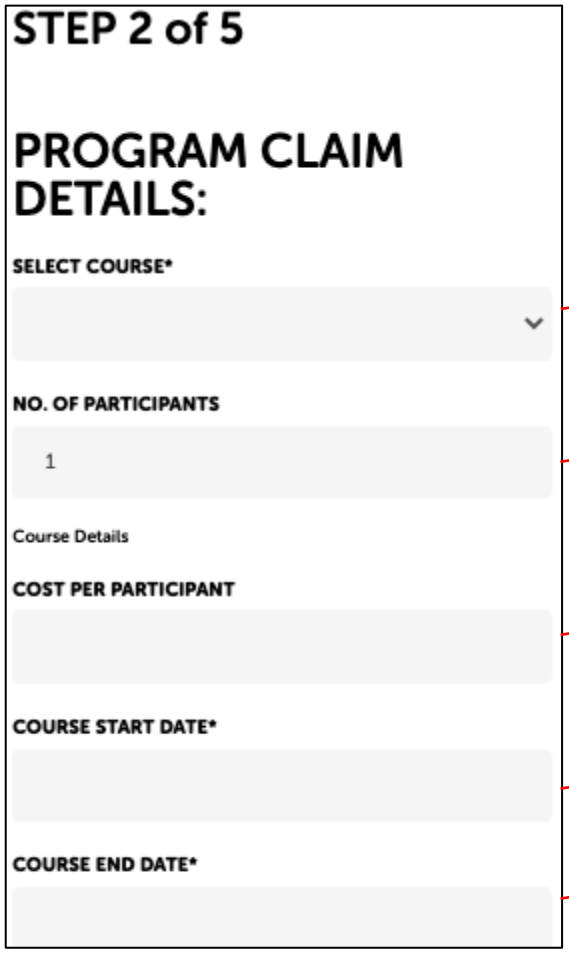
Claim higher qualification

This is for claiming training subsidies where units of higher qualification (a Certificate IV or Diploma) have been completed.

1) Select the 'Claim type' from the drop-down menu. Click 'Next'.



2) Complete course details.



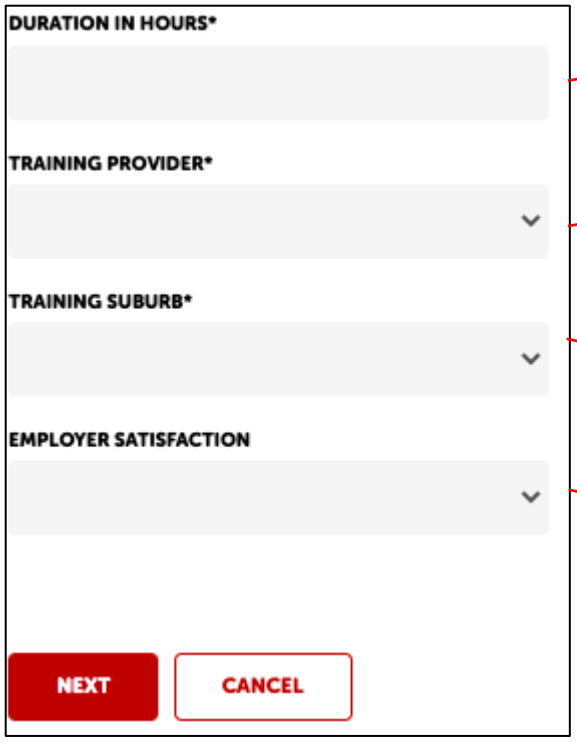
Select course – choose from the menu. If you can't find your course, please contact us.

No. of participants – you are claiming for (completed the same course, the same day).

Cost per participant – course cost including GST. Exclude Worksafe and/or admin fees.

Course start date – use the official start date.

Course end date – use the official end date.



Duration in hours – the total course hours (should be provided in the course outline).

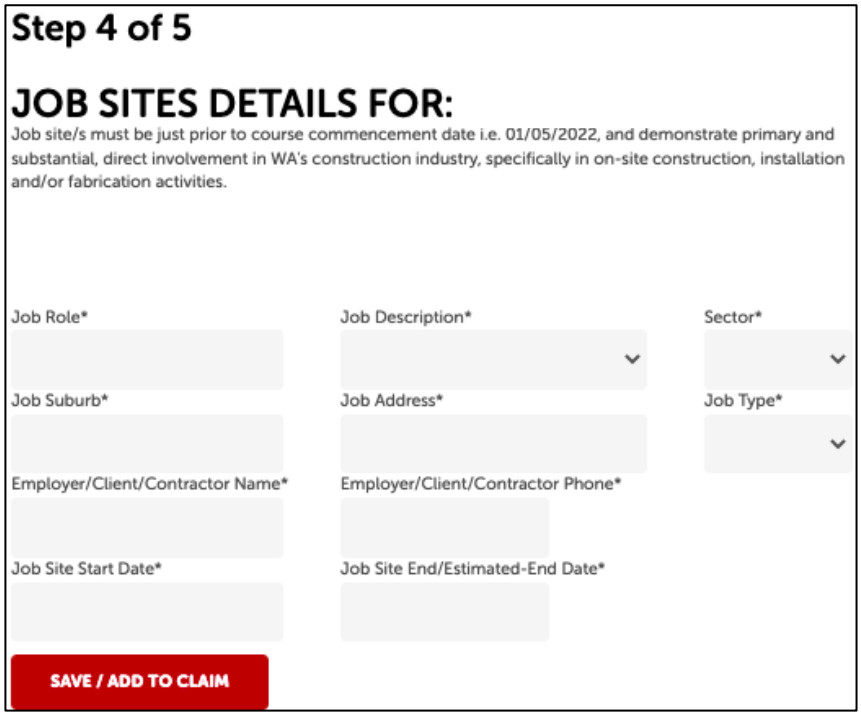
Training provider – choose from the list. If your provider isn't listed, please contact us.

Training suburb – e.g., the location of your Registered Training Organisation.

Employer satisfaction – with the course. Choose from 1 (low) to 5 (high).

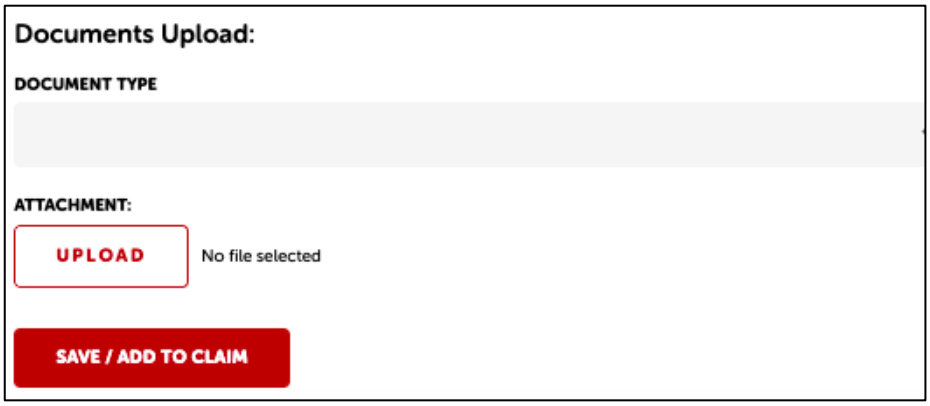
3) Complete your work details just prior to starting the course.

- Provide *five days* of your job site history information in the month prior to your training.
- If the participant attended one site per day, please provide five sites to satisfy the five days of job site history information.
- Click 'Save/Add to claim' *before* proceeding to the Document upload section.



4) Upload evidence of your course payment and successful course completion.

- *Before uploading your documents*, make sure the document name doesn't have any special characters (!, #, _, etc). The document name must have letters and numbers only.
- For 'Document type', choose from 'Paid Invoice/Receipt' or 'Statement of Attainment/Certificate'.
- Click the white 'Upload' button and find the relevant document on your device.
- Click 'Save/Add to claim'. Scroll down - you will see the document has been added to your claim.
- Repeat this process again to add all relevant documents to your claim. Click 'Next'.
- *Please note*, a bank transfer receipt or screenshot will not be accepted as proof of payment. The paid invoice/receipt from the training provider (RTO) must be provided.



5) Read and accept the declaration by ticking the box, then click 'Submit'.

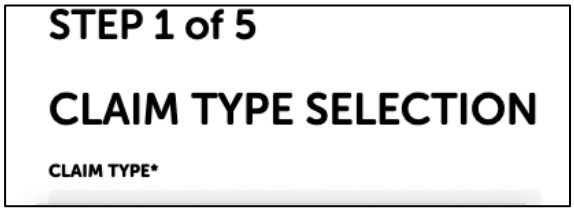
6) On submission, you will receive a confirmation message with your claim reference number.

- Keep this claim reference number on file. You will need to quote it if you need to contact CTF for any assistance with your claim.

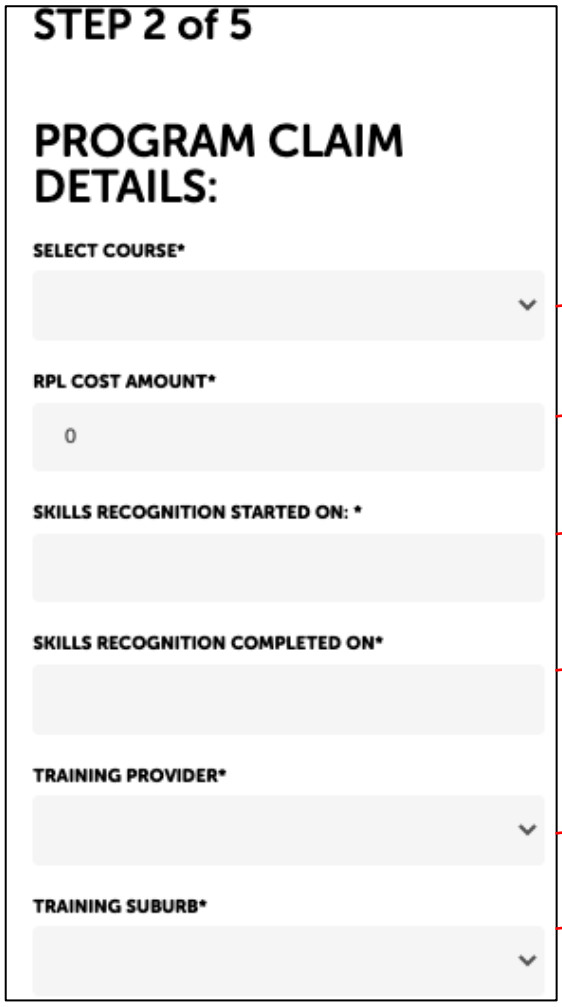
Claim recognition of prior learning

To view the units and/or courses that can be claimed for recognition of prior learning, click here.

1) Select the 'Claim type' from the drop-down menu. Click 'Next'.



2) Complete program details.



Select course – from drop-down menu.

RPL cost amount – including GST.

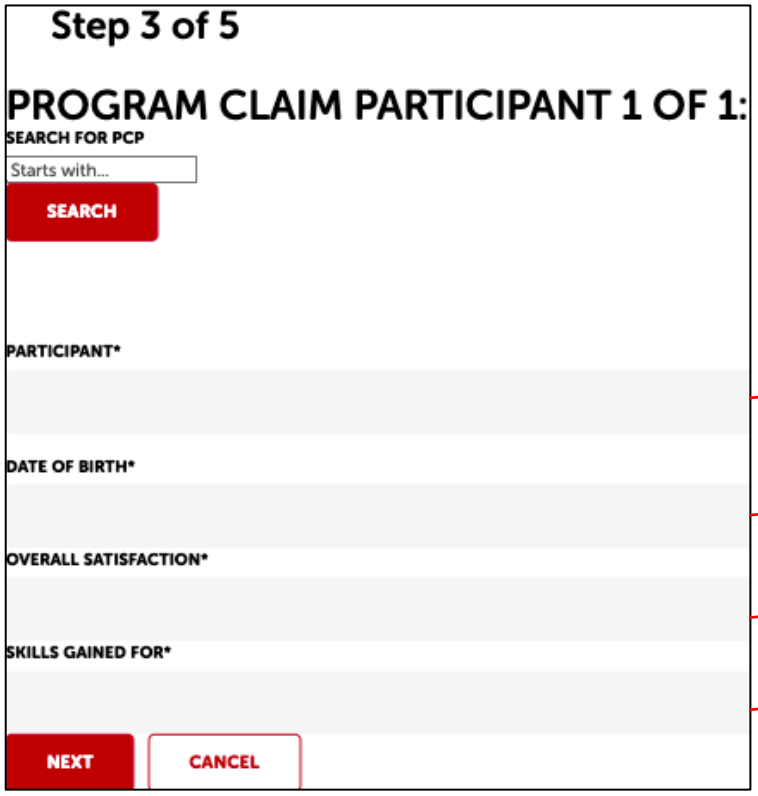
Skills recognition start on – the course start date.

Skills recognition completed on - the course end date.

Training provider – select from drop-down menu.

Training suburb - select from drop-down menu.

3) Complete program details for the participant.



Participant – choose name from the menu.

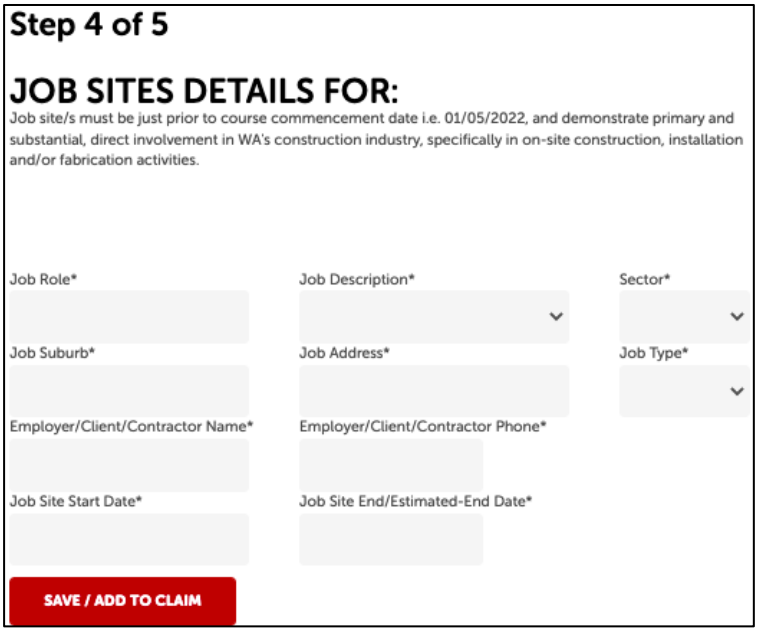
Date of birth – this may be input automatically.

Overall satisfaction – the participant/s satisfaction.

Skills gained for – select from the drop-down

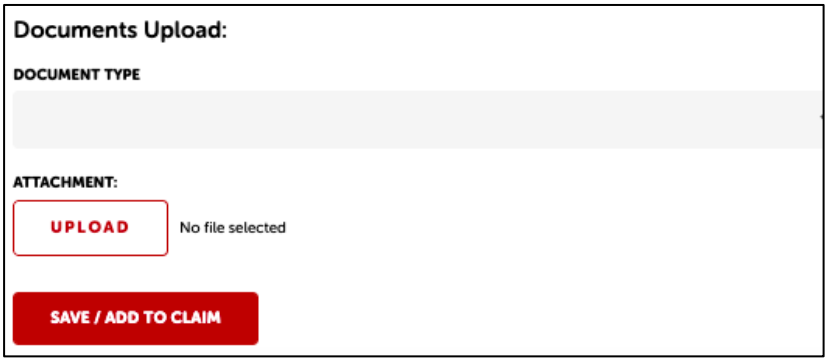
4) Complete your work details just prior to starting the course.

- Provide *five days* of your job site history information in the month prior to your training.
- If the participant attended one site per day, please provide five sites to satisfy the five days of job site history information.
- Click 'Save/Add to claim' before proceeding to the 'Documents upload' section.



5) Upload evidence of your course payment and completion certificate.

- For 'Document type', choose from 'Training Provider's Invoice' or 'RPL Assessment Certificate'.
- Click the white 'Upload' button and find the relevant document on your device.
- Click 'Save/Add to claim'. Scroll down - you will see this document has been added to your claim.
- Repeat this process again to add all relevant documents to your claim. Click 'Next'.



6) Read and accept the declaration by ticking the box, then click 'Submit'.

7) On submission, you will receive a confirmation message with your claim reference number.

- Keep this claim reference number on file. You will need to quote it if you need to contact CTF for any assistance with your claim.

Create multiple claims for upskilling and short course funding (bulk claim upload)

These instructions are for creating multiple claims for the upskilling and short course funding program *only*, i.e., three or more participants completed the same training course at the same time.

Important things to note:

- If three more participants completed different courses at the same time, or different courses at different times, you must complete separate claims.
- You must complete the pre-formatted 'upskilling and short course funding bulk upload' spreadsheet.
- You should only lodge a claim after the training course has been successfully completed.
- You can lodge a claim as soon as you have successfully completed your course, assuming you have received your Certificate or Statement of Attainment.
- For claims to be paid with 30 days, please make sure you provide all the required information.

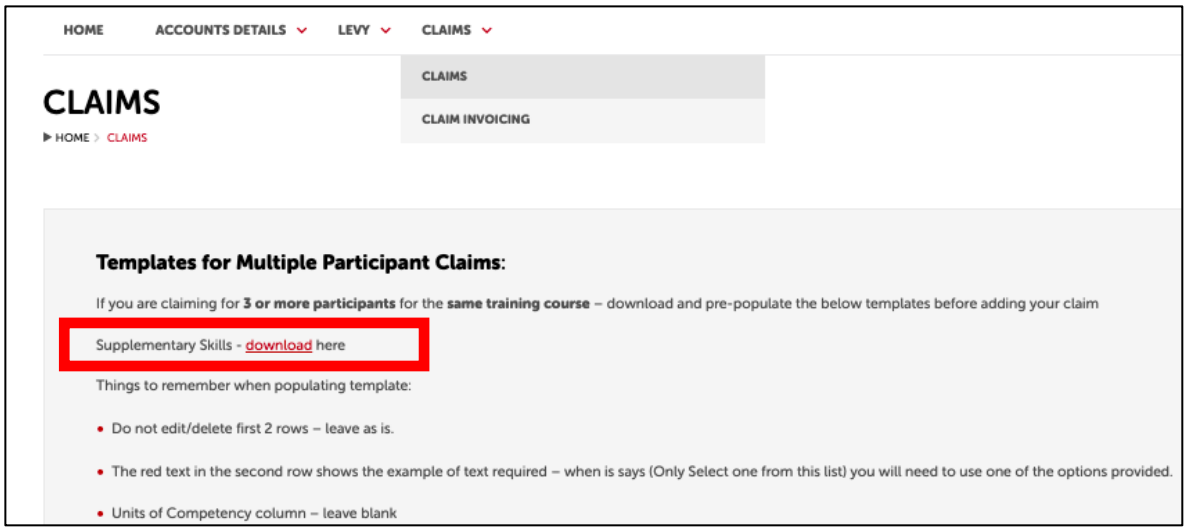
1) **Before you get started, make sure you have all the information you need.**

   This includes:

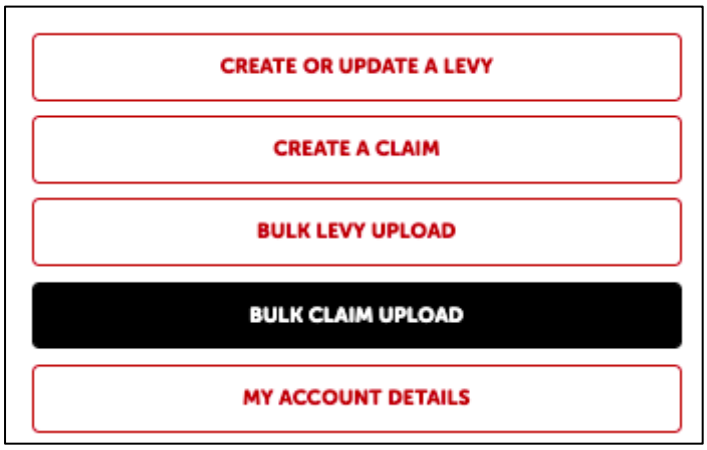
- **Course details** (course name, dates, cost including GST)
- **Participant details** (name, email address, date of birth)
- **Information regarding job sites** the claim participant was working on just prior to the date of training (job role, site address, description of works happening at that site)
- **Copy of the paid invoice or receipt** from the training provider
- **Certificate or Statement of Attainment** proving course completion

2) Make sure you have completed the 'upskilling and short course funding bulk upload' spreadsheet.

- This is a pre-formatted spreadsheet that must be used for claims for three or more participants.
- You can access this spreadsheet in the portal by navigating to the claims dashboard. See below.
- Alternately, you can request a copy by emailing info@ctf.wa.gov.au



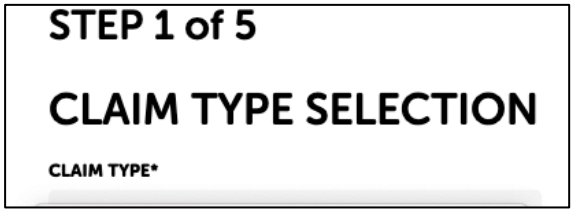
3) Navigate to the main dashboard in the portal and click 'Bulk claim upload'.



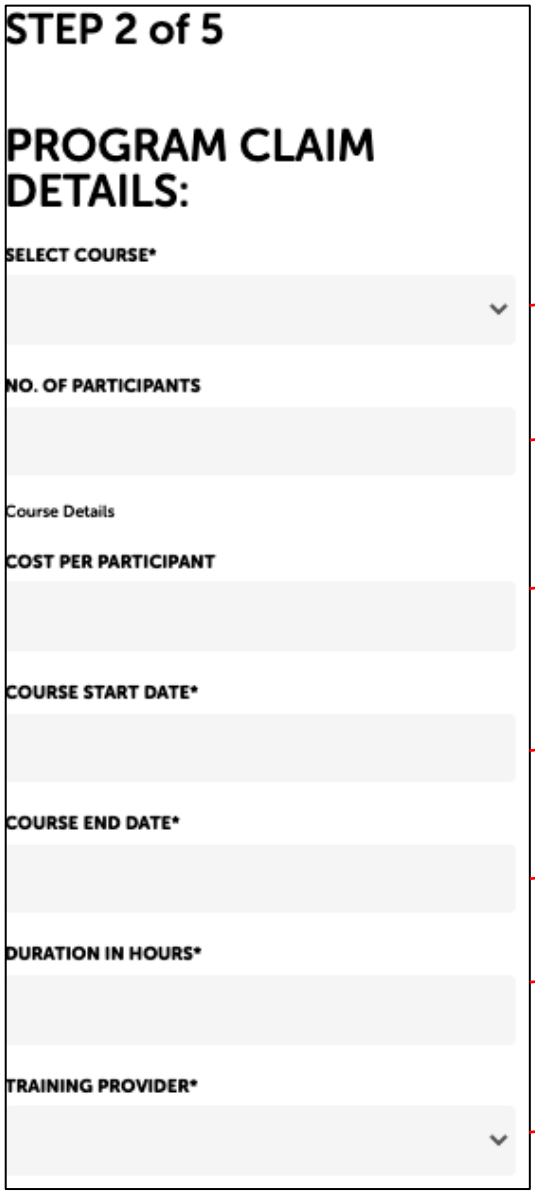
4) The claims dashboard will appear.

- Click 'Add claim' (red button).

5) **Select the 'Upskilling and short course funding' from the drop-down menu. Click 'Next'.**



6) **Complete the course details.**



Select course – choose from the menu. If you can't find your course, please contact us.

No. of participants – you are claiming for (completed same course at the same time).

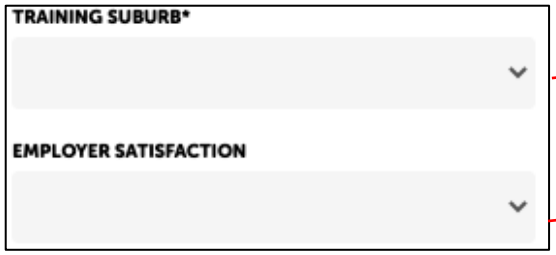
Cost per participant – course cost including GST. Exclude Worksafe and/or admin fees.

Course start date – use the official start date.

Course end date – use the official end date.

Duration in hours – the course hours per participant.

Training provider – choose from the list. If your provider isn't listed, please contact us.

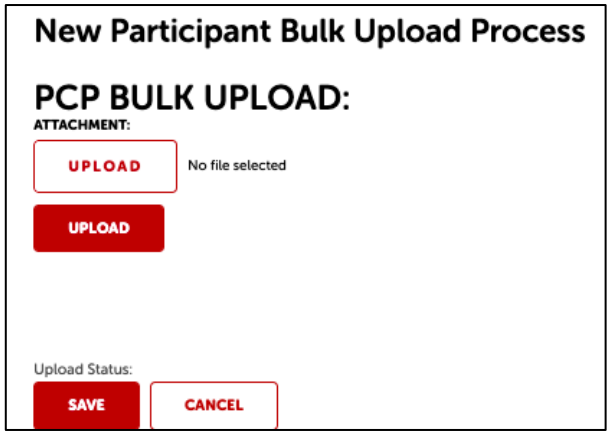


Training suburb – e.g., the location of your Registered Training Organisation.

Employer satisfaction – with the course. Choose from 1 (low) to 5 (high).

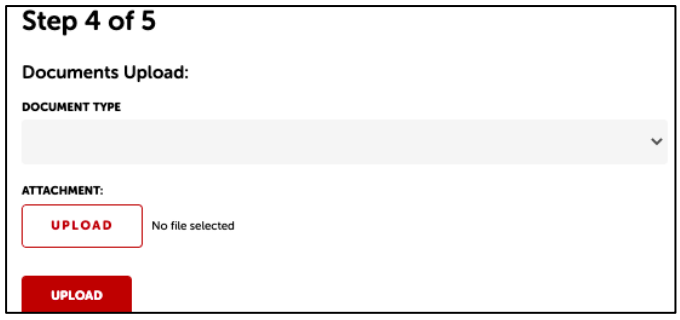
7) Upload your completed 'upskilling and short course funding bulk upload' spreadsheet.

- Click the white 'Upload' button. Find the completed spreadsheet.
- Make sure the document title doesn't have any special characters (!, #, _ etc).
- Click the red 'Upload' button. The document will appear below the button. Click 'Save'.



8) Upload evidence of course completion *and* course payment for each participant.

- For 'Document type', choose from 'Paid Invoice/Receipt' or 'Statement of Attainment/Certificate'.
- Click the white 'Upload' button and find the relevant document on your device.
- Click the red 'Upload' button.
- You will see the document appear underneath the red 'Upload' button. Click 'Save'.
- Repeat this process until all relevant documents for all participants are uploaded.



9) **Read and accept the declaration by ticking the box, then click 'Submit'.**

10) **On submission, you will receive a confirmation message with your claim reference number.**

- Keep this claim reference number on file. You will need to quote it if you need to contact CTF for any assistance with your claim.

Need help?

Troubleshooting tips

I'm trying to add a participant, but the portal shows their email address already exists.

We will need to sort this out for you. Please contact us at info@ctf.wa.gov.au or on (08) 9244 0100.

I cannot see the 'Add claim' button in the claims dashboard. Why?

We will need to sort this out for you. Please contact us at info@ctf.wa.gov.au or on (08) 9244 0100.

The portal has frozen. What do I do?

Don't click 'Cancel'.

If you have already completed steps 1, 2 and 3, the claim will be registered in the CTF system as an incomplete claim. Follow these steps:

- Close out of the screen by clicking on the 'x' (don't click 'Cancel').
- After one hour, you will receive an automated email from CTF requesting any documentation that wasn't successfully attached in your claim.
- Please reply to the email with the relevant documents attached.
- *Do not try to amend the claim in the portal*.
- **If the portal froze on step 1 or 2**, you will need to restart the claim.

The portal won't accept my 'upskilling and short course funding bulk claim upload' spreadsheet. Why?

You should check the following:

- All the pre-filled information has not been altered. Do not over-write anything that is already pre-populated.
- Only 1 row per participant.
- Input information from row 3 onwards only. Do not amend any information in rows 1 and 2.

- Complete columns A to G. *Leave column H, I and J blank.*
- In columns T and U, type in one of the options listed in red.
- All spelling should be correct, otherwise the upload will not work.
- Only one sector or job type has been input, otherwise the upload will not work.

How can I update my claim in the portal?

You cannot update a claim in the portal.

To do this, please contact us at info@ctf.wa.gov.au or on (08) 9244 0100. We are available during business hours, Monday to Friday.

Contact us

We're here to help!

You can get in touch with our friendly team during business hours from Monday to Friday.

- www.ctf.wa.gov.au
- info@ctf.wa.gov.au
- (08) 9244 0100