



# Update a Client Record that is Associated with Your Organisation

Disability Case Portal (DCP)

Autism Advisor or Better Start Information and Registration Service

This task card will take you through the process of updating a client record associated with your organisation.

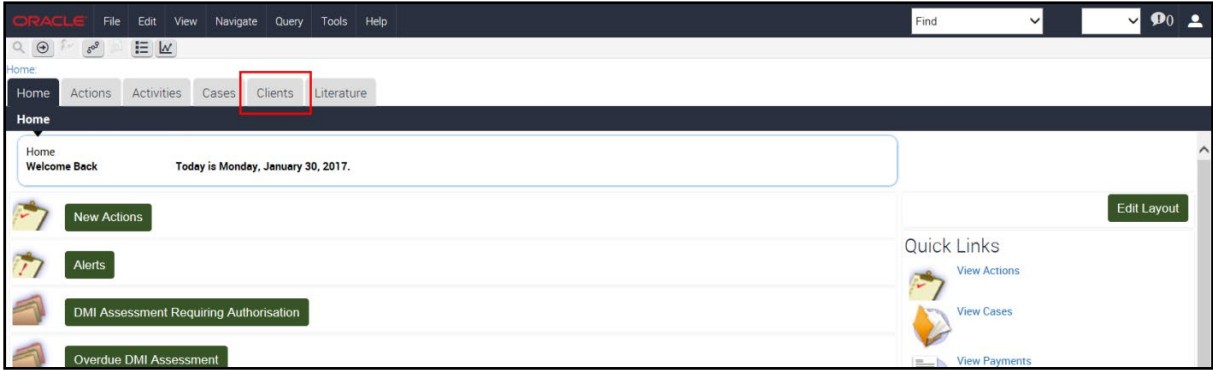

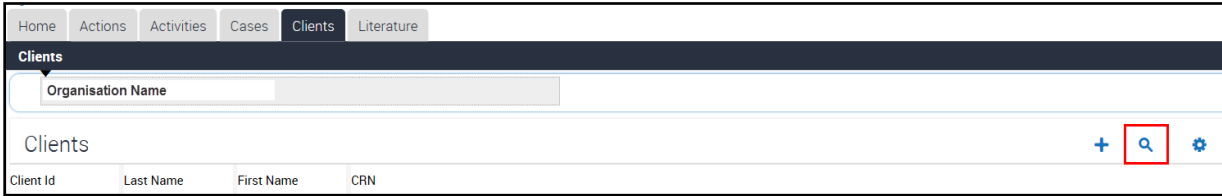
You will be shown how to:

Update a client's residential Address

Update contact details

**Portal Access:**

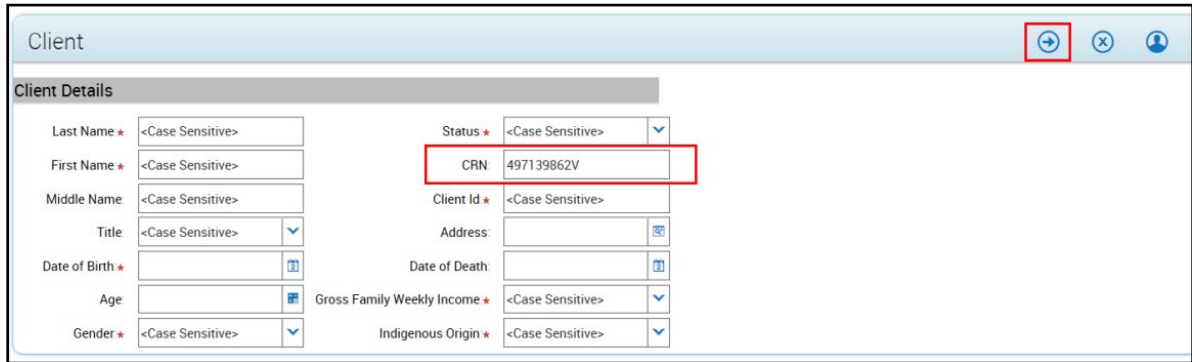
- Access the internet and log in to DCP at <https://portal.dss.gov.au/fofmsportal>

Steps	Actions
1	<p>Navigate to the <b>Clients</b> screen by clicking on the Clients tab.</p> 
2	<p>Click the  (Query) icon to search for the client record you want to update.</p> 

Steps	Actions
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3

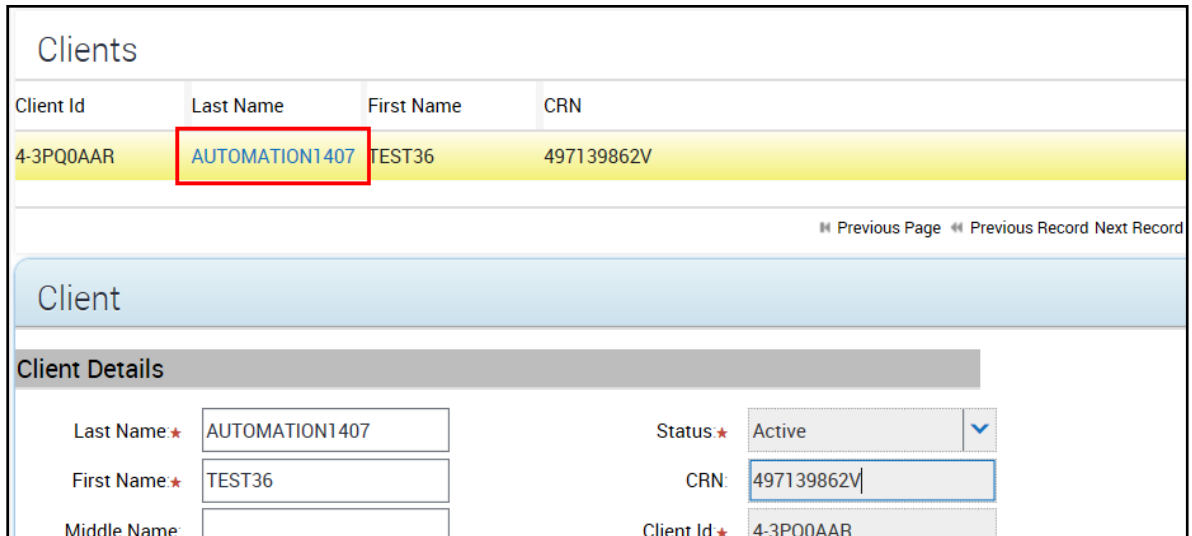
Enter the **Customer Reference Number (CRN)** then click the  (Go) icon.



The screenshot shows a 'Client' form with a search bar at the top containing a Go icon. Below the search bar is a 'Client Details' section with various input fields. The 'CRN' field, containing the value '497139862V', is highlighted with a red rectangular box. Other fields include Last Name, First Name, Middle Name, Title, Date of Birth, Age, Gender, Status, Client Id, Address, Date of Death, Gross Family Weekly Income, and Indigenous Origin.

4

Click the **Last Name** hyperlink to open the client record.



The screenshot shows a 'Clients' table with columns for Client Id, Last Name, First Name, and CRN. The row with Client Id '4-3PQ0AAR', Last Name 'AUTOMATION1407', First Name 'TEST36', and CRN '497139862V' is highlighted in yellow. The 'Last Name' 'AUTOMATION1407' is highlighted with a red rectangular box. Below the table is a 'Client' form with a 'Client Details' section. The 'Last Name' field contains 'AUTOMATION1407', 'First Name' contains 'TEST36', 'Status' is 'Active', 'CRN' is '497139862V', and 'Client Id' is '4-3PQ0AAR'.

5

**To update a client’s residential address**

For this example, the client’s residential address has changed and you need to create a new address record.

Note: The residential address must be the same as the address on the client’s proof of residence document, i.e. Centrelink Notification, utilities or rates invoice.

**Steps****Actions**

6 In the **Address** details section, click the glyph beside the Address field.

Home Actions Activities Cases **Clients** Literature

**Clients**

Client

**Client Details**

Last Name★ AUTOMATION1407 Status★ Active

First Name★ TEST36 CRN: 497139862V

Middle Name: Client Id★ 4-3PQ0AAR

Title: Mr Address: 1 Kent Street, THEVENARD

Date of Birth★ 29/11/2010 Date of Death:

Age: 6 Gross Family Weekly Income★ Medium (\$600 - \$1,999)

Gender★ M Indigenous Origin★ Not Stated

Assessments EI Financials EI More Info **Cases** Communication Contacts Disabilities Origins

**Cases**

Case Id	CRN	Last Name	First Name	Organisation Name	Activity Id
4-3PT15KU	497139862V	AUTOMATION1407	TEST36	Organisation Name	4-3PQ5H38

7 Click **New** to create a new address record.

Client Addresses

**New** 1 - 1 of 1

Mailing	Id	Building / Floor	Street / PO Box	Suburb / Town	State
<input checked="" type="checkbox"/>	4-3PQ0AB5		1 Kent Street	THEVENARD	SA

« Previous Page « Previous Record Next Record » Next Page »

OK

Steps	Actions
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**8** Enter the client's new address.

The software will locate and geographically code the client's address to determine if the client resides in an outer regional or remote location.

DCP uses this information to automatically assess the client's eligibility for the Outer Regional and Remote (OR&R) access payment.

The screenshot shows a web form titled "Address Validation" with a close button (X) in the top right corner. The form contains several input fields: "Building / Floor:", "Street Name (incl number):" (with the value "109 Johnstone Cres"), "Suburb:" (with the value "Lane Cove"), "State:" (with the value "NSW"), and "Postcode:". A red rectangular box highlights these input fields. To the right of the input fields is a grey box containing an "Example Address:" which lists: "Level 6, HSA House", "15 Bowes St", "Woden", "ACT", and "2606". Below the input fields is a green "Find" button. At the bottom right of the form area, it says "No Records".

**9** Click the **Find** button to validate the address.

This screenshot is identical to the one above, showing the "Address Validation" form. However, the red rectangular box now highlights the green "Find" button located below the input fields. The rest of the form, including the example address and the "No Records" text, remains the same.

- 10** Highlight the appropriate address and select the **OK** button to continue.  
If the address doesn't display as expected, contact the GPS Helpdesk on 1800 020 283.

**Address Validation**

Building / Floor:

Street Name (incl number):

Suburb:

State:

Postcode:

**Find**

**Example Address:**  
Level 6, HSA House  
15 Bowes St  
Woden  
ACT  
2606

1 - 1 of 1

Building / Floor	Street / PO Box	Suburb / Town	Postcode	State
	109 Johnston Cres...	LANE COVE NORTH	2066	NSW

« Previous Page « Previous Record Next Record » Next Page »

**OK** **Cancel**

- 11** Select **Residential** from the drop down list under Type.

**Client Addresses**

**New**   1 - 2 of 2

Street / PO Box	Suburb / Town	State	Postcode	Country	Type
109 Johnston C...	LANE COVE NO...	NSW	2066	Australia	Postal
1 Kent Street	THEVENARD	SA	5690	Australia	Residential

« Previous Page « Previous Record Next Record » Next Page »

Postal  
Residential  
Residential - Alternative  
Temporary  
Work

- 12** Tick the **Mailing** box.

**Client Addresses**

**New**   1 - 2 of 2

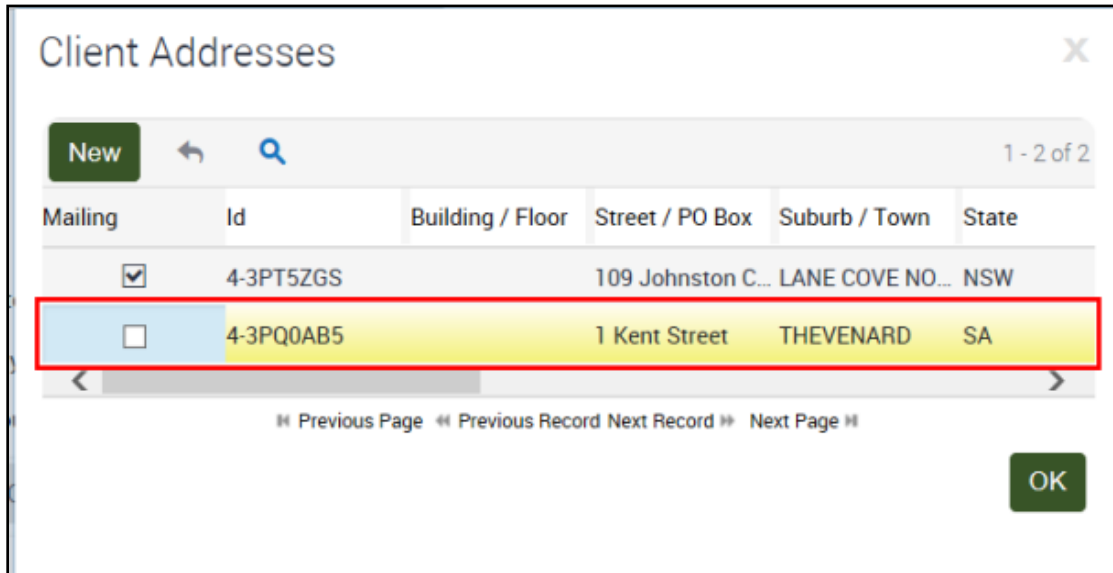
Mailing	Id	Building / Floor	Street / PO Box	Suburb / Town	State
<input checked="" type="checkbox"/>	4-3PT5ZGS		109 Johnston C...	LANE COVE NO...	NSW
<input type="checkbox"/>	4-3PQ0AB5		1 Kent Street	THEVENARD	SA

« Previous Page « Previous Record Next Record » Next Page »

**OK**

Steps	Actions
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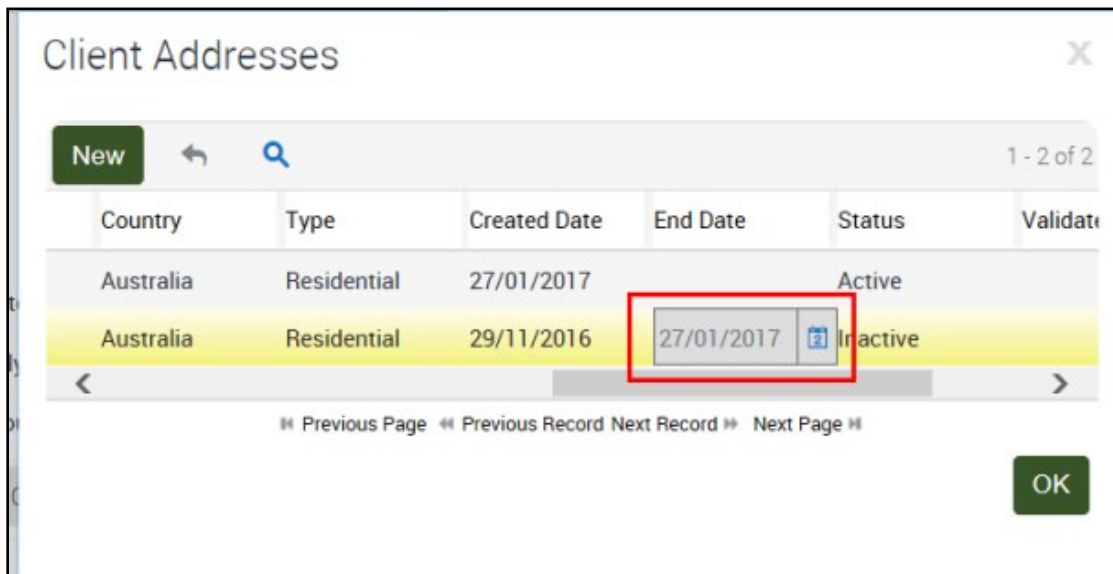
- 13 You also need to deactivate and enter an end date against the previous address. Click the **previous address** record.



The screenshot shows a table titled "Client Addresses" with columns: Mailing, Id, Building / Floor, Street / PO Box, Suburb / Town, and State. The second record is highlighted in yellow and has a red border around it. The record details are: Mailing: , Id: 4-3PQ0AB5, Building / Floor: 1 Kent Street, Suburb / Town: THEVENARD, State: SA. There is an "OK" button at the bottom right.

Mailing	Id	Building / Floor	Street / PO Box	Suburb / Town	State
<input checked="" type="checkbox"/>	4-3PT5ZGS		109 Johnston C...	LANE COVE NO...	NSW
<input type="checkbox"/>	4-3PQ0AB5	1 Kent Street		THEVENARD	SA

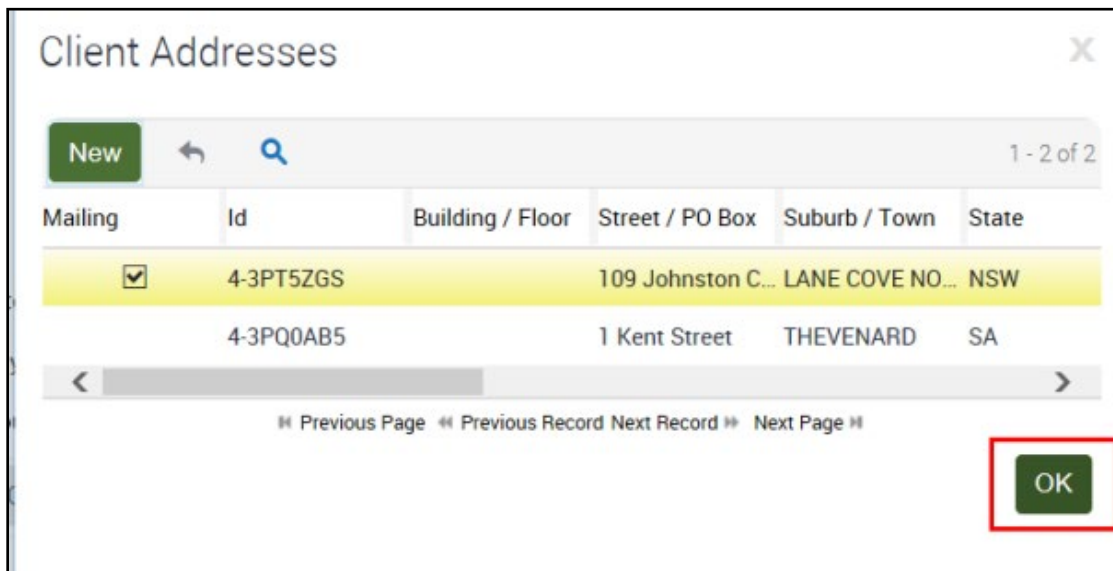
- 14 Enter a date in the **End Date** field.



The screenshot shows a table titled "Client Addresses" with columns: Country, Type, Created Date, End Date, Status, and Validate. The second record is highlighted in yellow and has a red border around its End Date field. The record details are: Country: Australia, Type: Residential, Created Date: 29/11/2016, End Date: 27/01/2017, Status: Inactive. There is an "OK" button at the bottom right.

Country	Type	Created Date	End Date	Status	Validate
Australia	Residential	27/01/2017		Active	
Australia	Residential	29/11/2016	27/01/2017	Inactive	

- 15 Click the **OK** button.



The screenshot shows the same table as in step 14. The "OK" button at the bottom right is highlighted with a red border.

Mailing	Id	Building / Floor	Street / PO Box	Suburb / Town	State
<input checked="" type="checkbox"/>	4-3PT5ZGS		109 Johnston C...	LANE COVE NO...	NSW
<input type="checkbox"/>	4-3PQ0AB5	1 Kent Street		THEVENARD	SA

**16** You will notice that the Address Details section updates with the new address.

The screenshot shows the 'Client Details' form. The 'Address' field is highlighted with a red box and contains the text '109 Johnston Crescent'. Other fields include Last Name (AUTOMATION1407), First Name (TEST36), Status (Active), CRN (497139862V), Client Id (4-3PQ0AAR), Title (Mr), Date of Birth (29/11/2010), Age (6), Gender (M), Date of Death, Gross Family Weekly Income (Medium (\$600 - \$1,999)), and Indigenous Origin (Not Stated). At the bottom, there are tabs for Assessments, EI Financials, EI More Info, Cases, Communication, Contacts, Disabilities, and Origins.

**17** You should check whether the client has become eligible for the Outer Regional and Remote Payment.

Click the EI More Info TAB. The eligible OR&R payment field will indicate eligibility.

The screenshot shows the 'EI More Info' tab selected. It is divided into two sections: 'Eligibility and Diagnosis Details' and 'Confirmation of Eligibility'. In the 'Confirmation of Eligibility' section, the 'Eligible for OR&R Payment' checkbox is checked and highlighted with a red box. Other fields include Eligibility Stream (AEI), Basis of Eligibility (State/Territory service), Eligibility Start Date (29/11/2016), Eligibility End Date (29/11/2017), and Override Eligibility End Date (unchecked). The 'Eligibility and Diagnosis Details' section includes Month/Year of Diagnosis (11/2016) and Diagnosis Tool (ADEC).

Note: You should ask the client's family or carer whether they have previously received the Outer Regional and Remote Payment. If not, advise them to contact their Autism Advisor or the Better Start Registration and Information Service for more information.

**18** Each time you update a client's address, you must also complete and authorise an AEI or BSI - Client Change of Address checklist.  
Click the **Assessments** tab.


**Client Details**

Last Name★ AUTOMATION1407	Status★ Active
First Name★ TEST36	CRN: 497139862V
Middle Name:	Client Id★ 4-3PQ0AAR
Title: Mr	Address: 109 Johnston Crescent
Date of Birth★ 29/11/2010	Date of Death:
Age: 6	Gross Family Weekly Income★ Medium (\$600 - \$1,999)
Gender★ M	Indigenous Origin★ Not Stated

Assessments
EI Financials
EI More Info
Cases
Communication
Contacts
Disabilities
Origins




### Client Assessments

Template Name	Description	Status	Authorised	Authorised By
AEI - AA Checkl...	AEI Advisor Ch...	Authorised	29/11/2016	F1COXCC

**19** Click the  (New) icon to add a new checklist record.

Assessments
EI Financials
EI More Info
Cases
Communication
Contacts
Disabilities
Origins

### Client Assessments






Template Name	Description	Status	Authorised	Authorised By
AEI - AA Checkl...	AEI Advisor Ch...	Authorised	29/11/2016	F1COXCC

**20** To access the Change of Address checklist, click the glyph beside the **Template Name** field.

Assessments
EI Financials
EI More Info
Cases
Communication
Contacts
Disabilities

### Client Assessments

Template Name	Description	Status	Authorised	Authorised By
<div style="border: 1px solid red; display: inline-block; padding: 2px;">  </div>		Not Started		
AEI - AA Checkl...	AEI Advisor Ch...	Authorised	29/11/2016	F1COXCC



**Steps****Actions**

**21** Click the **Change of Address template** and then click the **OK** button.


Select Assessment Template

Search: Name [ ] [v] [ ] 1 - 2 of 2


Name	Description
AEI - AA Ch...	AEI Advisor Checklist for registering new client
AEI - Chan...	AEI Client Change of Address

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**OK** Cancel

**22** Click the  (Save) icon to save in the Assessments view.


Assessments | EI Financials | EI More Info | Cases | Communication | Contacts | Disabilities | Origins

Client Assessments +  🔍

Template Name	Description	Status	Authorised	Authorised By
AEI - Change...	AEI Client Chan...	Not Started		
AEI - AA Checkl...	AEI Advisor Ch...	Authorised	29/11/2016	F1COXCC

**23** The change of address questions display. You will notice that the Status is Not Started.

Assessments | EI Financials | EI More Info | Cases | Communication | Contacts | Disabilities | Origins

Client Assessments +  🔍 ⚙️ 1 - 2 of 2

Template Name	Description	Status	Authorised	Authorised By
AEI - Change of...	AEI Client Chan...	Not Started		
AEI - AA Checkl...	AEI Advisor Ch...	Authorised	29/11/2016	F1COXCC

« Previous Page « Previous Record Next Record » Next Page »


Questions 🔍 ⚙️ 1 - 3 of 3

#	Question	Answer	Justification
1	Has proof of the new address been sighted and a record kept on file?		
2	Have you informed the family of any changes to accessible service...		
3	If the client's R&R eligibility flag has been checked, has the family be...		

« Previous Page « Previous Record Next Record » Next Page »

**24** Click **In Progress** from the drop down list and then save the record.

Assessments | EI Financials | EI More Info | Cases | Communication | Contacts | Disabilities | Origins

Client Assessments +  🔍

Template Name	Description	Status	Authorised	Authorised By
AEI - AA Checkl...	AEI Advisor Ch...	Authorised	29/11/2016	F1COXCC
AEI - Change of...	AEI Client Chan...	In Progress		

« Previous Page « Previous Record Next Record » Next Page »

Questions

#	Question	Answer	Justification
1	Has proof of the new address been sighted and a record kept on file?		
2	Have you informed the family of any changes to accessible service...		

**Steps****Actions**


**25** Answer each question by selecting an option from each drop down list.

The screenshot shows the 'Client Assessments' interface. At the top, there are navigation tabs: Assessments, EI Financials, EI More Info, Cases, Communication, Contacts, Disabilities, and Origins. Below the tabs is a table with the following data:

Template Name	Description	Status	Authorised	Authorised By
AEI - AA Checkl...	AEI Advisor Ch...	Authorised	29/11/2016	FICOXCC
AEI - Change of...	AEI Client Chan...	In Progress		

Below the table is a 'Questions' section with a table:

#	Question	Answer	Justification
1	Has proof of the new address been sighted and a record kept on file?	<input type="text" value=""/> <input type="button" value="v"/>	
2	Have you informed the family of any changes to accessible service...	Yes	
3	If the client's R&R eligibility flag has been checked, has the family be...		


**26** To save, click the  (Menu) icon and select **Save Record** the Questions view.

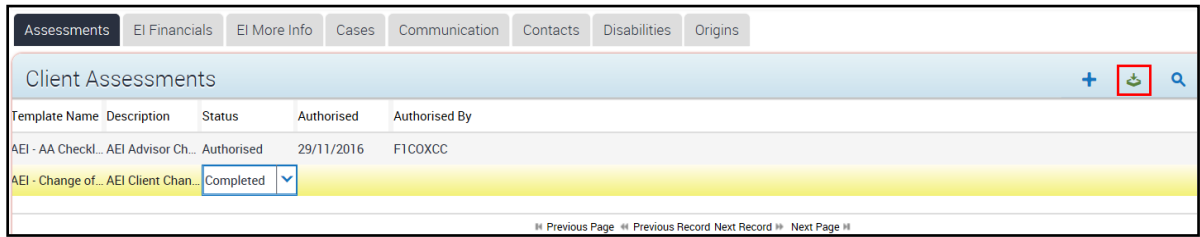
The screenshot shows the 'Client Assessments' page with a context menu open. The menu items are: Save Record [Ctrl+S], New Query [Alt+Q], Run Query [Alt+ENTER], Refine Query [ALT+G], About Record [Ctrl+Alt+K], Record Count [Ctrl+Shift+3], Create Bookmark..., Print Preview..., Import..., and Export. The 'Save Record' option is highlighted with a red box. The background shows the same table as in step 25, with the 'In Progress' status highlighted.

**27** To complete the checklist, click **Completed** from the Status drop down list.

The screenshot shows the 'Client Assessments' page. The 'Status' dropdown menu for the highlighted row is open, showing the options 'In Progress' and 'Completed'. The 'Completed' option is highlighted with a red box. The background shows the same table as in step 25, with the 'In Progress' status highlighted.

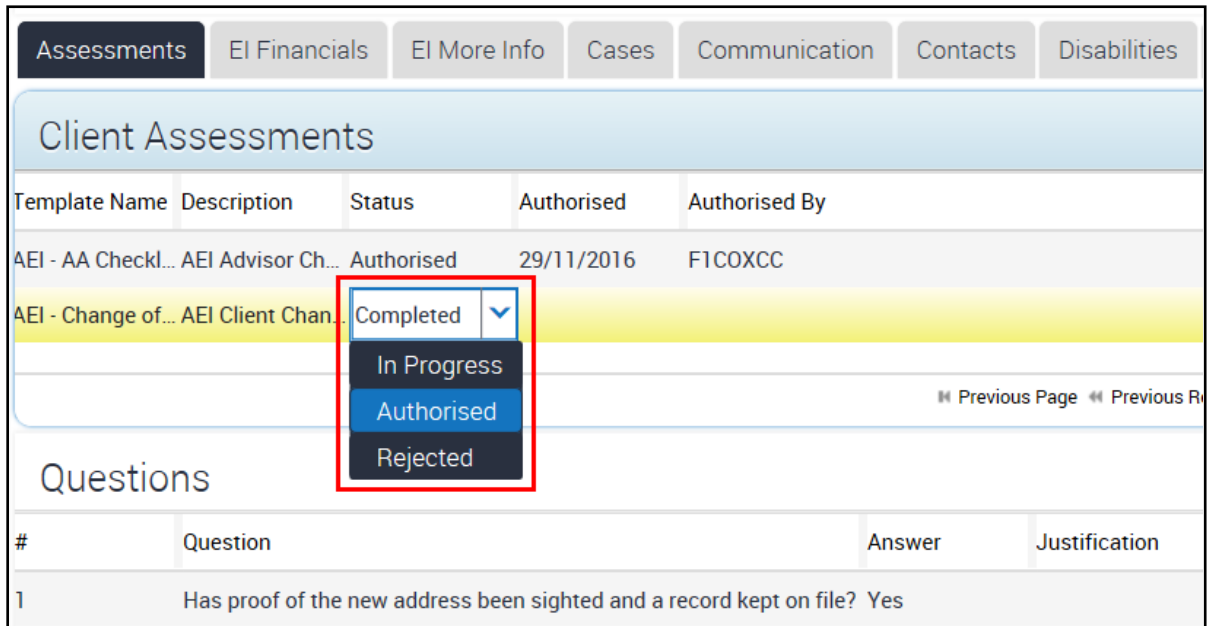
**Steps****Actions**

28 Click the  (Save) icon to save the status change.




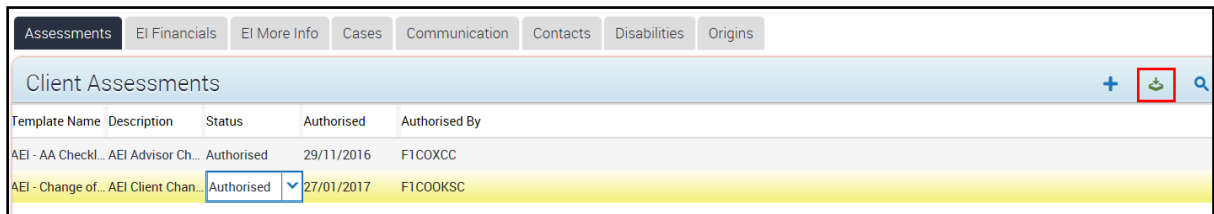
The screenshot shows a web application interface for 'Client Assessments'. At the top, there are navigation tabs: 'Assessments', 'EI Financials', 'EI More Info', 'Cases', 'Communication', 'Contacts', 'Disabilities', and 'Origins'. Below the tabs is a search bar with a '+' icon, a save icon (highlighted with a red box), and a search icon. The main content is a table with columns: 'Template Name', 'Description', 'Status', 'Authorised', and 'Authorised By'. The table contains two rows. The first row is 'AEI - AA Checkl... AEI Advisor Ch...' with status 'Authorised', date '29/11/2016', and user 'F1COXCC'. The second row is 'AEI - Change of... AEI Client Chan...' with status 'Completed' (selected in a dropdown menu) and user 'F1COXCC'. At the bottom, there are navigation links: 'Previous Page', 'Previous Record', 'Next Record', and 'Next Page'.

29 You now need to authorise the change of address. Select **Authorised** from the Status drop down list.



The screenshot shows the same 'Client Assessments' interface as in step 28. The status dropdown menu for the second row is open, showing four options: 'Completed', 'In Progress', 'Authorised' (highlighted in blue), and 'Rejected'. The 'Authorised' option is selected. The table also shows the first row with status 'Authorised'. Below the table, there is a 'Questions' section with a table with columns: '#', 'Question', 'Answer', and 'Justification'. The first row in the 'Questions' table has '# 1' and 'Question: Has proof of the new address been sighted and a record kept on file? Yes'. At the bottom right, there are navigation links: 'Previous Page' and 'Previous Record'.

30 Click the  (Save) icon to save the status change.



The screenshot shows the 'Client Assessments' interface. The status dropdown menu for the second row is open, showing 'Authorised' as the selected option. The table shows the first row with status 'Authorised' and the second row with status 'Authorised', date '27/01/2017', and user 'F1COOKSC'. The save icon (highlighted with a red box) is visible in the top right corner of the table area. Navigation links 'Previous Page' and 'Previous Record' are also visible at the bottom right.

**31 Update contact details**

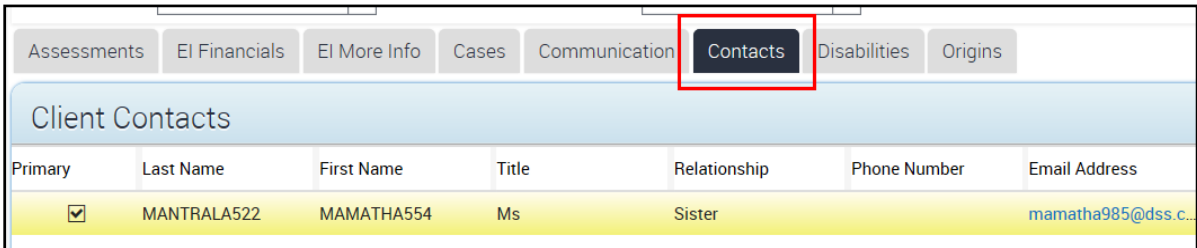
For this next example, the client’s primary contact notifies you that they have changed their home phone number. You need to update their phone record.


**More Information**

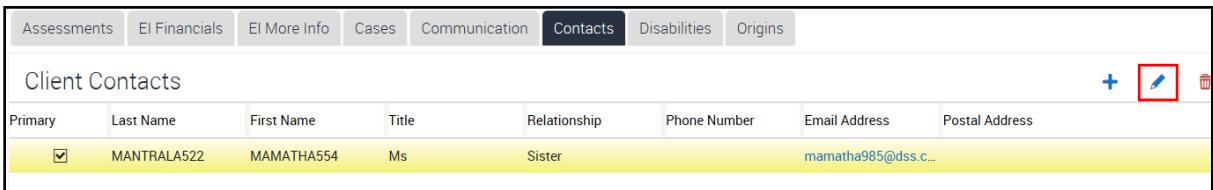
DSS provides clients with a monthly Family Activity Statement outlining claims made for services, and their remaining AEI or BSI balances.

Family Activity Statements are emailed or mailed to the person entered as the primary contact. Therefore, you need to ensure that you record a valid email or postal address for the primary contact of each client receiving services from your organisation.

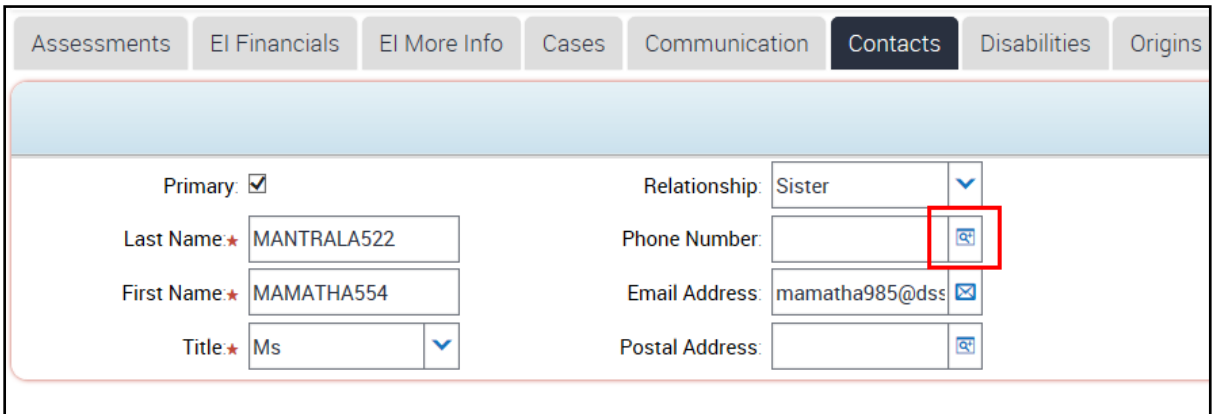
**32 To update the contact person of the client’s phone number, select the Contacts tab.**




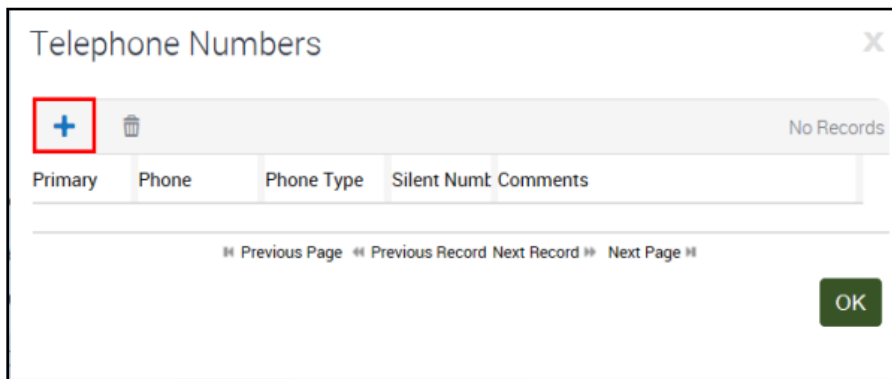
**33 Click the  (Edit) icon to edit the record.**




**34 Select the glyph beside the Phone Number field.**



- 35 Click the  (New) icon to create a new phone number record.



Telephone Numbers X

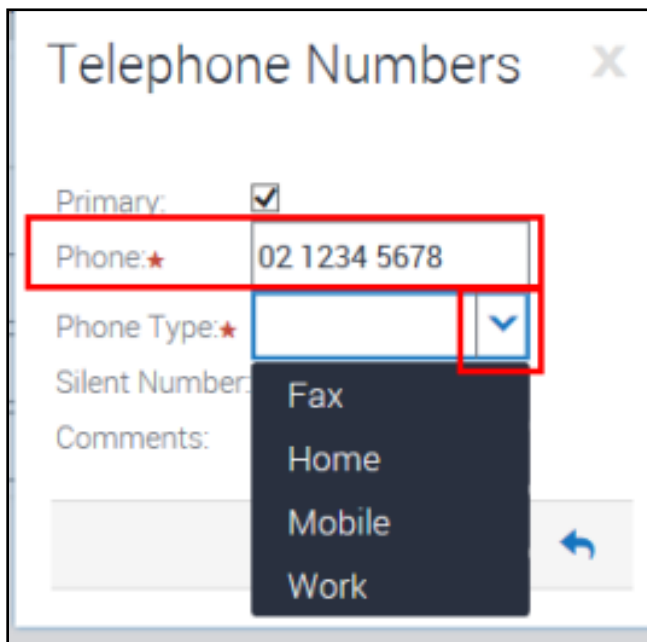
+  No Records

Primary	Phone	Phone Type	Silent Numt	Comments
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« Previous Page « Previous Record Next Record » Next Page »

OK

- 36 Type the contact's new number in the Phone field and select the Phone Type from the drop down menu.



Telephone Numbers X

Primary:


Phone:★


Phone Type:★ ▼

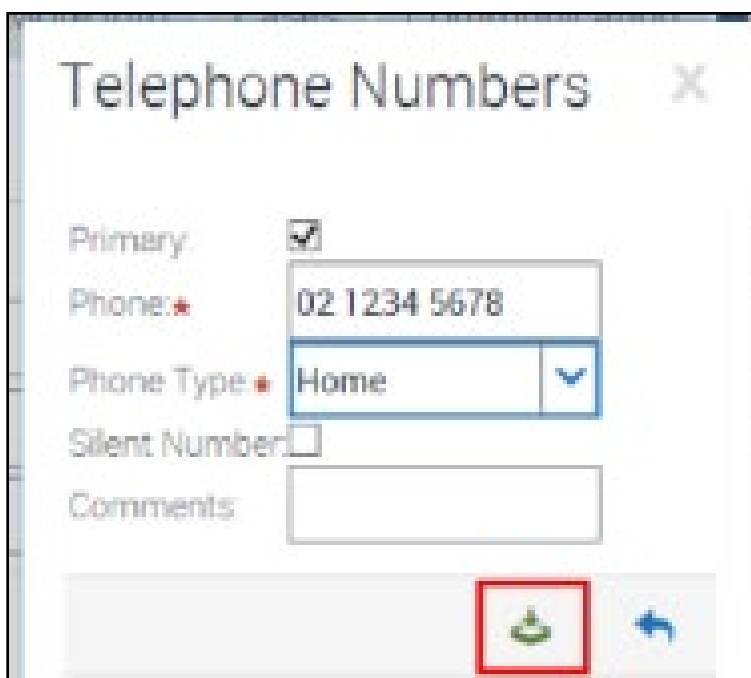
- Fax
- Home
- Mobile
- Work

Silent Number:

Comments:



- 37 Select the  (Save) icon to save the changes.



Telephone Numbers X



Primary:

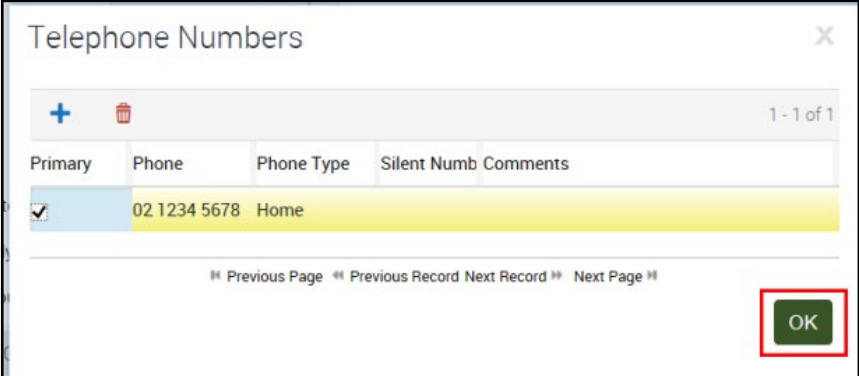
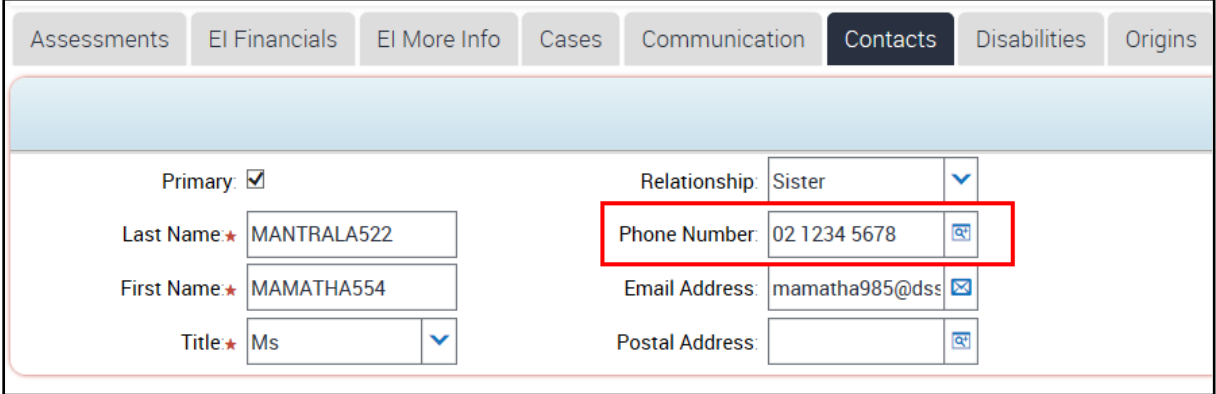

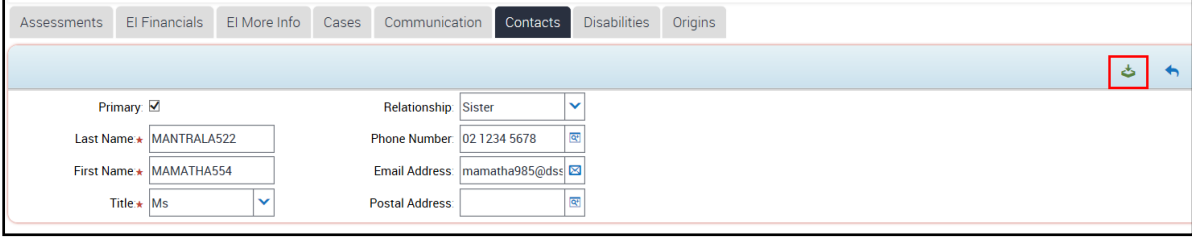
Phone:★

Phone Type:★  ▼

Silent Number:

Comments:

Steps	Actions
38	<p>The new phone number will display. Check the details are correct and click <b>OK</b>.</p> 
39	<p>The primary contact's new phone number appears in the Phone Number field.</p> 
40	<p>Click the  (Save) icon to save the changes.</p> 
41	<p>Note: If a new primary contact is required for this client you will need to make a professional judgment as to who is the primary contact with due regard to any court orders or agreements provided to you.</p> <p>If you would like to change the client's primary contact select New, enter the required information and save the record.</p>
42	<p>You have now finished updating the Client Record.</p>

## Need Help?

For further assistance please contact the [GPS Helpdesk](mailto:GPS.Helpdesk@communitygrants.gov.au) on 1800 020 283 or email [GPS.Helpdesk@communitygrants.gov.au](mailto:GPS.Helpdesk@communitygrants.gov.au)