

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 |
| --- | --- |
|  | Navigate to the **Clients** screen by clicking on the Clients tab.  Clients home screen |
|  | Click the **Query Icon** (Query)icon to search for the client record you want to update.  Clients screen |
|  | Enter the **Customer Reference Number (CRN)** then click the Go Icon  (Go) icon**.**  Clients screen |
|  | Click the **Last Name** hyperlink to open the client record.  Clients screen |
|  | **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. |
|  | In the **Address** details section, click the glyph beside the Address field.  Clients screen |
|  | Click **New** to create a new address record.  Client address pop up box |
|  | **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.  Client address pop up box |
|  | Click the **Find** button to validate the address.  Client address pop up box |
|  | 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.  Client address pop up box |
|  | Select **Residential** from the drop down list under Type.  Client address pop up box |
|  | Tick the **Mailing** box.  Client address pop up box |
|  | You also need to deactivate and enter an end date against the previous address.  Click the **previous address** record.  Client address pop up box |
|  | Enter a date in the **End Date** field.  Client address pop up box |
|  | Click the **OK** button.  Client address pop up box |
|  | You will notice that the Address Details section updates with the new address.  Clients screen |
|  | 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.  Clients screen  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. |
|  | 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 Assessments screen |
|  | Click the New Icon  (New) icon to add a new checklist record.  Client Assessments screen |
|  | To access the Change of Address checklist, click the glyph beside the **Template Name** field.  Client Assessments screen |
|  | Click the **Change of Address template** and then click the **OK** button.  Select Assessment Template pop up |
|  | Click the Save Icon  (Save) icon to save in the Assessments view.  Client Assessments screen |
|  | The change of address questions display. You will notice that the Status is Not Started.  Client Assessments screen |
|  | Click **In Progress** from the drop down list and then save the record.  Client Assessments screen |
|  | **Answer** each question by selecting an option from each drop down list.  Client Assessments screen |
|  | To save, click the Menu Icon  (Menu) icon and select **Save Record** the Questions view.  Client Assessments screen |
|  | To complete the checklist, click **Completed** from the Status drop down list.  Client Assessments screen |
|  | Click the Save Icon  (Save) icon to save the status change.  Client Assessments screen |
|  | You now need to authorise the change of address. Select **Authorised** from the Status drop down list.  Client Assessments screen |
|  | Click the Save Icon  (Save) icon to save the status change.  Client Assessments screen |
|  | **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. |
|  | To update the contact person of the client’s phone number, select the Contacts tab.  Contacts screen |
|  | Click the Edit button (Edit) icon to edit the record.  Contacts screen |
|  | Select the glyph beside the Phone Number field.  Contacts screen |
|  | Click the New Icon (New) icon to create a new phone number record.  Telephone numbers pop up |
|  | Type the contact’s new number in the Phone field and select the Phone Type from the drop down menu.  Telephone numbers pop up |
|  | Select the Save Icon  (Save) icon to save the changes.  Telephone numbers pop up |
|  | Telephone numbers pop up The new phone number will display. Check the details are correct and click **OK**. |
|  | The primary contact’s new phone number appears in the Phone Number field.  Contacts screen |
|  | Click the Save button (Save) icon to save the changes.  Contacts screen |
|  | 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.  If you would like to change the client’s primary contact select New, enter the required information and save the record. |
|  | You have now finished updating the Client Record. |

**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)