



# Creating a New Case Record

Disability Case Portal (DCP)

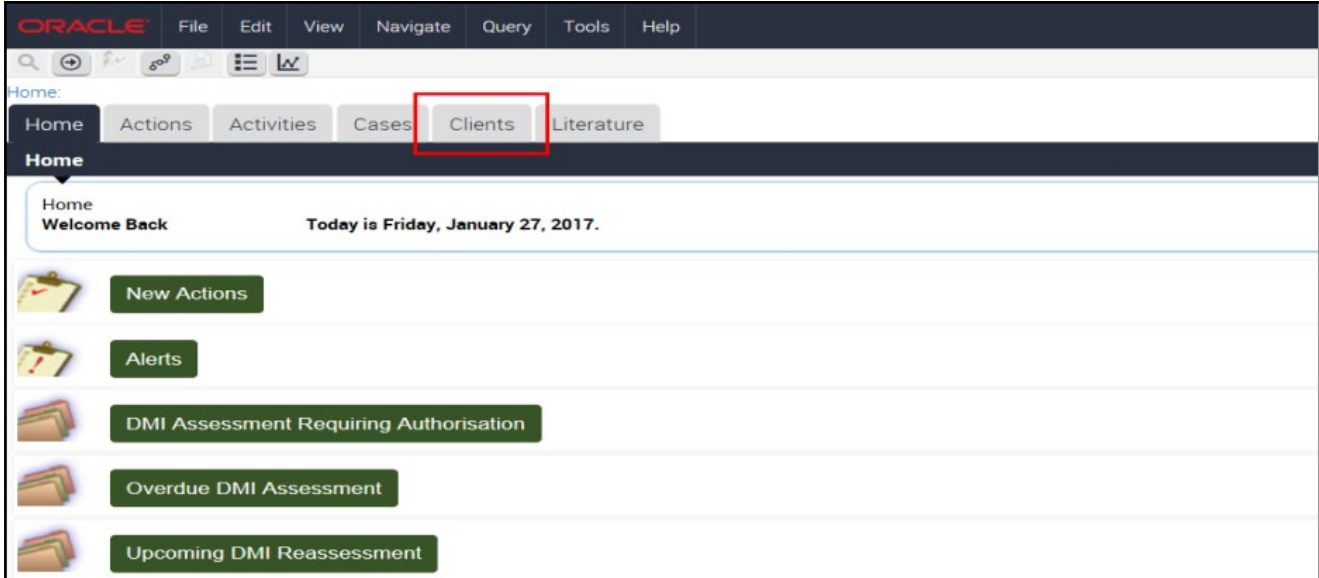
## Autism Advisor or Better Start Information and Registration Service

This task card will take you through the process of creating a new Case record for an existing client in the Disability Case Portal (DCP).

A DCP Case record signifies an interaction between a client and a particular organisation. While an eligible child will only have one DCP Client record that may be used by multiple organisations, each organisation will also be required to create a DCP Case record that is unique to the particular service the client is accessing. You must create a Case Record for all eligible clients under the Autism or Better Start Early Intervention program that have requested assistance from you.

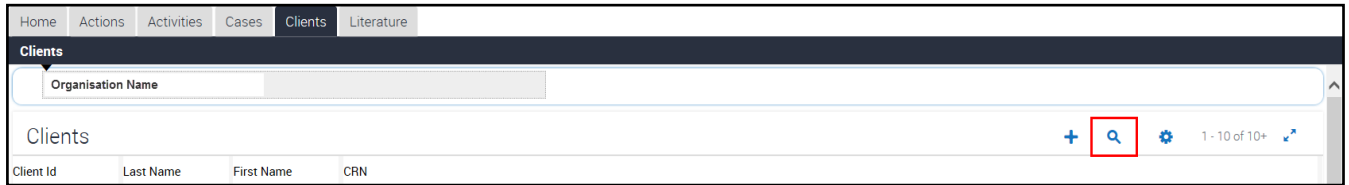
### Portal Access:

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

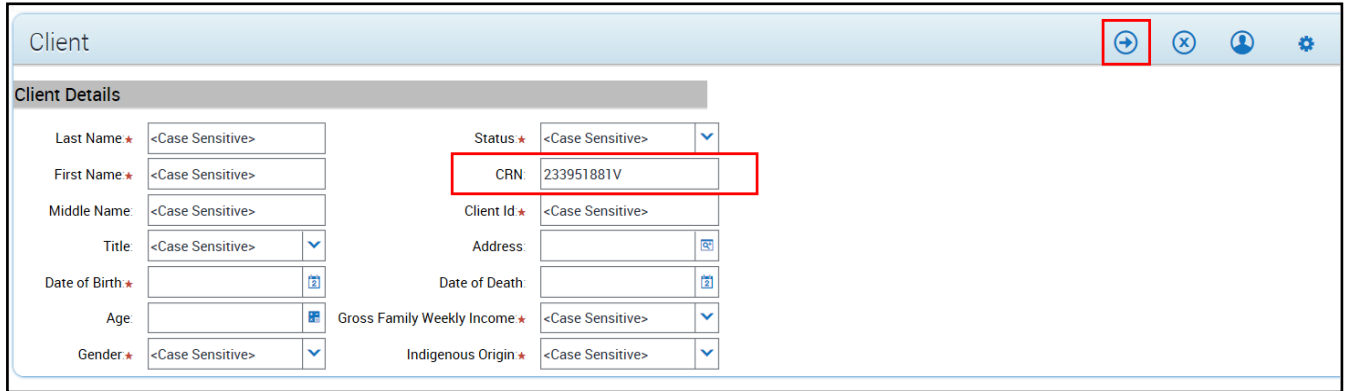
Step	Action
1.	Navigate to the <b>Clients</b> by clicking on the Clients tab. 

Step	Action
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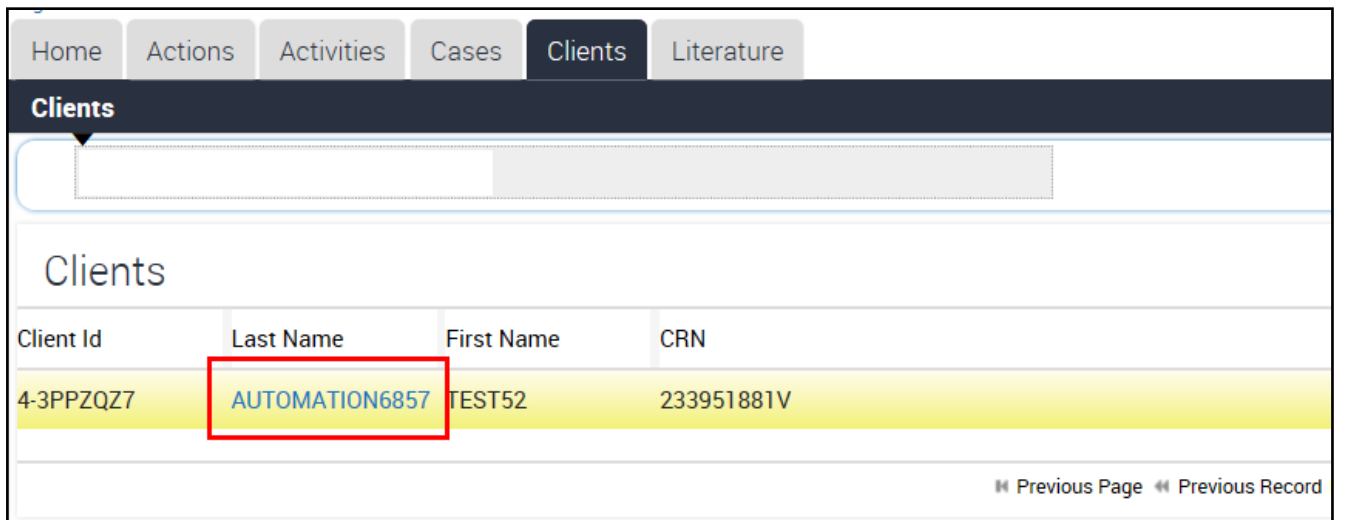
2. Click the  (Query) icon.



3. Enter the client's **CRN** in the **CRN** field and click the  (Go) button.



4. To access the client's details, select the hyperlink on the **client's surname**.



### Update Client details

It is always important to keep a client's details up to date.

For example, the client's address details or primary contact may change.

For instructions on how to change a client's details please see the *Update an Existing Client Record that is Associated with Your Organisation* task card.

**Step**   **Action**

5. Navigate to the **Cases** view tab in the bottom half of the screen.

The screenshot shows the 'Client Details' form with the following fields:

- Last Name: AUTOMATION6857
- First Name: TEST52
- Middle Name: (empty)
- Title: Mr
- Date of Birth: 29/11/2010
- Age: 6
- Gender: M
- Status: Draft
- CRN: 233951881V
- Client Id: 4-3PPZQZ7
- Address: 1 Kent Street, THEVENAI
- Date of Death: (empty)
- Gross Family Weekly Income: Medium (\$600 - \$1,999)
- Indigenous Origin: Not Stated

At the bottom, a row of tabs includes: Assessments, EI Financials, EI More Info, **Cases** (highlighted with a red box), Communication, Contacts, Disabilities, and Origins.

6. Click the (New) icon to add a new case.

The screenshot shows the 'Cases' view with a table of cases. The 'New' icon (a blue square with a white plus sign) is highlighted in a red box. The table has the following columns: Case Id, CRN, Last Name, First Name, Organisation Name, Activity Id, Activity/Program Name Service Type, Case Type, Phase, and Fun.

7. A box containing cases will appear on the screen. You can search this box to make sure there are not any existing cases for this client already. Once you are satisfied there are no other existing cases, you can select the (New) icon to continue to create a new case.

The screenshot shows a modal window titled 'Cases' with a search bar and a list of cases. The 'New' icon (a blue square with a white plus sign) is highlighted in a red box. The list of cases is as follows:

Case Id	CRN	Last Name	First Name
4-3PP03RC	187295123S	AUTO3685	TEST9
4-3PP042F	263789295L	AUTO6151	TEST3
4-3PP08HV	472779463T	AUTO5198	TEST7
4-3PP08N4	424924437J	AUTO2767	TEST0
4-3PP0I30	885375739H	AUTO4383	TEST7
4-3PQ4EDF	328746325T	AUTOMATION7666	TEST42
4-3PQ4EIF	777527715H	AUTOMATION6264	TEST72
4-3PQ4EQR	631237219C	AUTOMATION0148	TEST28
4-3PQ4Q3X	554225798T	AUTOMATION4501	TEST90
4-3PQ4QKB	324278645V	AUTOMATION4717	TEST73

At the bottom of the modal, there are 'OK' and 'Cancel' buttons.

Step	Action
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8. The details of the Client for which this Case is being created display in the Client Details section and include the client's last name, first name, CRN and date of birth.

GPS also creates a unique Case Id. You should reference the Case Id in any correspondence with DSS about the client.

Click the glyph next to **Activity ID**.

Assessments | El Financials | El More Info | **Cases** | Communication | Contacts | Disabilities | Origins

Client Details	Agreement Details	Case Details
Last Name: AUTOMATION68...	Activity Id *	Case Id * 4-3PT5ZJF
First Name: TEST52	Organisation Name:	Case Type *
CRN: 233951881V	Activity/Program Name:	Phase:
Date of Birth: 29/11/2010	Service Type *:	Funding Level:
Client Id * 4-3PPZQZ7	Funding Model Name *:	Weekly Wage:
	Funding Model Version *:	Weekly Hours:
		Case Details Verified: <input type="checkbox"/>
		Status: Draft
		Status Change Date: 30/01/2017
		Status Change Reason: Not Applicable
		Case Worker *
		Payments Suspended: <input type="checkbox"/>
		Claims Suspended: <input type="checkbox"/>
		Maximum Claims Limit:
		Q&A Status:
		Q&A Phase:
		Q&A Id:
		Q&A Updated Date:

9. Select the relevant **Activity Id** from the list then click **OK**.

A GPS Activity outlines the type of service performed by your organisation. You select the Activity that relates directly to the service that you provide to the client.

Please make a note of your Activity Id and provide this number in any correspondence with DSS.

Select Activity

Activity Id: [Search] [Dropdown] [Input] 1 - 10 of 10+

Activity Id	Type	Organisation Id	Organisation	Program
4-3PQ5H38	Standard Sc...	4-3PPHZW9		
4-3PQ5H1J	Standard Sc...	4-3PPHZW9		
4-3PQ5NBE	Standard Sc...	4-3PPHZW9		
4-3PPJ9UY	Standard Sc...	4-3PPHZW9		
4-3PPJ06p	Standard Sc...	4-3PPHZW9	Organisation Name	
4-3PPJ090	Standard Sc...	4-3PPHZW9		
4-3PPPRVP	Standard Sc...	4-3PPHZW9		
4-3PPPRX5	Standard Sc...	4-3PPHZW9		
4-3PPPRYA	Standard Sc...	4-3PPHZW9		
4-3PQ5BJH	Standard Sc...	4-3PPHZW9		

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**OK** Cancel

Step	Action
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10. Click the **Case Type** drop-down box. For Autism select AEI, for Better Start select BSI.

Assessments | El Financials | El More Info | **Cases** | Communication | Contacts | Disabilities | Origins

Client Details	Agreement Details	Case Details
Last Name: AUTOMATION68...	Activity Id: 4-3PPJ06D	Case Id: 4-3PT5ZJF
First Name: TEST52	Organisation Name: Organisation Name	Case Type: [dropdown]
CRN: 233951881V	Activity/Program Name: Autism Early Intervent	Phase: [dropdown]
Date of Birth: 29/11/2010	Service Type: Panel Services	Funding Level: [input]
Client Id: 4-3PPZQZ7	Funding Model Name: AEI Panel Services	Weekly Wage: [input]
	Funding Model Version: 1	Weekly Hours: [input]
		Case Details Verified: <input type="checkbox"/>
		Status: Draft
		Status Change Date: 30/01/2017
		Status Change Reason: Not Applicable
		Case Worker: Case Worker
		Payments Suspended: <input type="checkbox"/>
		Claims Suspended: <input type="checkbox"/>
		Maximum Claims Limit: [input]
		Q&A Status: [dropdown]
		Q&A Phase: [input]
		Q&A Id: [input]
		Q&A Updated Date: [input]

11. Click the glyph to find the correct **Case Worker**

The Case Worker refers to the person from your organisation that is entering the information for this client on in the DCP.

Assessments | El Financials | El More Info | **Cases** | Communication | Contacts | Disabilities | Origins

Client Details	Agreement Details	Case Details
Last Name: AUTOMATION68...	Activity Id: 4-3PPJ06D	Case Id: 4-3PT5ZJF
First Name: TEST52	Organisation Name: Organisation Name	Case Type: [dropdown]
CRN: 233951881V	Activity/Program Name: Autism Early Intervent	Phase: [dropdown]
Date of Birth: 29/11/2010	Service Type: Panel Services	Funding Level: [input]
Client Id: 4-3PPZQZ7	Funding Model Name: AEI Panel Services	Weekly Wage: [input]
	Funding Model Version: 1	Weekly Hours: [input]
		Case Details Verified: <input type="checkbox"/>
		Status: Draft
		Status Change Date: 30/01/2017
		Status Change Reason: Not Applicable
		Case Worker: [input] [glyph]
		Payments Suspended: <input type="checkbox"/>
		Claims Suspended: <input type="checkbox"/>
		Maximum Claims Limit: [input]
		Q&A Status: [dropdown]
		Q&A Phase: [input]
		Q&A Id: [input]
		Q&A Updated Date: [input]

Step	Action
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12. Highlight the appropriate **Case Worker** from the list and then click the **OK** button.

Pick Employee

Last Name [Last Name] 1 - 6 of 6

Last Name	First Name	Position	Login
Suzan A		FaCS SP AEI Case Worker	
Suzan C		FaCS SP AEI Case Worker	
Carly A		FaCS SP AEI User	
Carly B		FaCS SP AEI User	
Carly C		FaCS SP AEI User	
Carly D		FaCS SP AEI User	

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OK Cancel

13. Save the record by clicking the  (Save) icon.

Assessments | El Financials | El More Info | **Cases** | Communication | Contacts | Disabilities | Origins

Client Details Agreement Details Case Details

Last Name: AUTOMATION68... Activity Id: 4-3PPJ06D Case Id: 4-3PT5ZJF Status: Draft

First Name: TEST52 Organisation Name: Organisation Name Case Type: Status Change Date: 30/01/2017

CRN: 233951881V Activity/Program Name: Autism Early Intervent Phase: Status Change Reason: Not Applicable

Date of Birth: 29/11/2010 Service Type: Panel Services Funding Level: Case Worker: Case Worker

Client Id: 4-3PPZQZ7 Funding Model Name: AEI Panel Services Weekly Wage: Payments Suspended:

Funding Model Version: 1 Weekly Hours: Claims Suspended:

14. The Case record now displays in the List view.  
Click the **Case ID** hyperlink to open the Case Record.

Assessments | El Financials | El More Info | **Cases** | Communication | Contacts | Disabilities | Origins

Cases

Case Id	CRN	Last Name	First Name	Organisation Name	Activity Id	Activity/Program Name	Service Type
4-3PT5ZKN	233951881V	AUTOMATION6857	TEST52	Organisation Name	4-3PPJ090	Autism Early Intervent...	Resource Support

15. Click the dropdown next to Status and change the **Status** to **Started**.

Home | Actions | Activities | **Cases** | Clients | Literature

Cases By Status **Case List**

TEST52 AUTOMATION6857 - Organisation Name (Auto 0000)

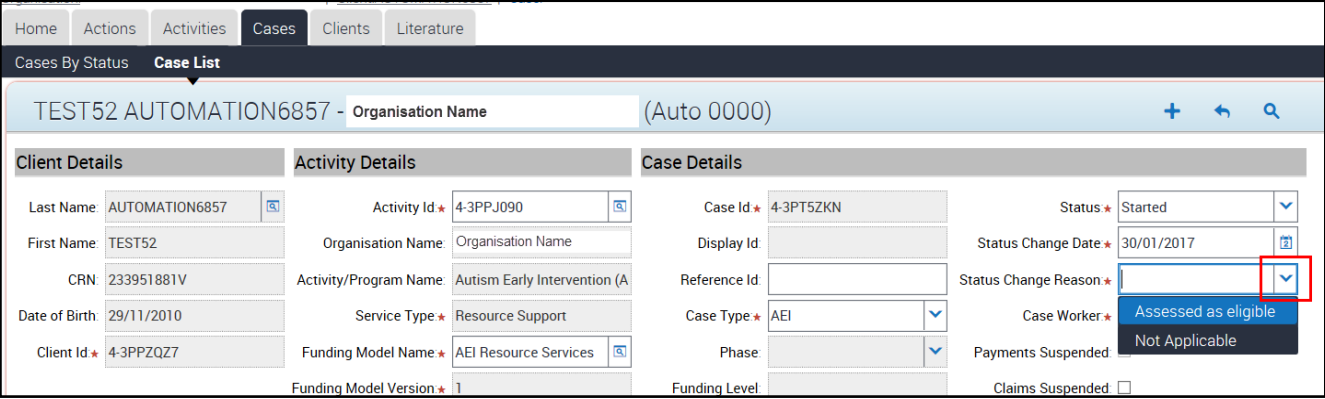

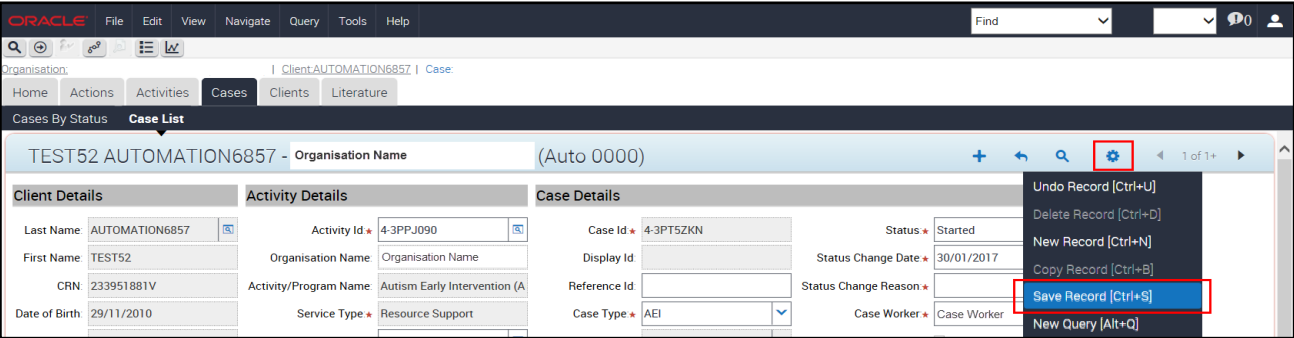
Client Details Activity Details Case Details

Last Name: AUTOMATION6857 Activity Id: 4-3PPJ090 Case Id: 4-3PT5ZKN Status: Draft

First Name: TEST52 Organisation Name: Organisation Name Display Id: Status Change Date: Started

CRN: 233951881V Activity/Program Name: Autism Early Intervention (A Reference Id: Status Change Reason: Not Applicable

Date of Birth: 29/11/2010 Service Type: Resource Support Case Type: AEI Case Worker: Case Worker

Step	Action
16.	<p>Click the dropdown and change the <b>Status Change Reason</b> and select <b>Assessed as Eligible</b>.</p> 
17.	<p>Save the record by clicking into the  (Menu) icon and selecting <b>Save Record</b>. Please make a note of the Case Id for this client before continuing.</p> 
18.	<p>If applicable, you will now also be required to print a <b>Letter of Introduction</b> for the client to provide to approved Autism or Better Start Early Intervention Panel Services Providers.</p> <p>For instructions on how to print a Letter of Introduction follow the task card or training video <b>Print a Letter of Introduction</b>.</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)