

Creating a New Client 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 Client record in Disability Case Portal (DCP).

Each eligible child will only have one DCP client record which may be accessed by multiple organisations that are providing assistance to the client. Organisations will create their own unique DCP Case record for each client to indicate their connection to the client.

## 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 |
|  | DCP displays a list of clients currently associated to your organisation.  To create a new Client record, click the New icon (New) icon.  Clients screen |
|  | Enter the Client’s **Customer Reference Number (CRN)** and **Date of Birth** and then click the Go Icon (Go) icon.  Add Associated clients pop up  MCj02344440000[1]  **Important Note:** If the following message appears, a record for this client already exists.  Add Associated clients pop up |
|  | If no record is displayed, select the New icon (New) icon to create a new Client record.  Associated Clients pop up box |
|  | Scroll down the screen to enter the client’s **Last Name**, **First Name** and **CRN**.  Client details screen |
|  | Click the glyph and select the **Date of Birth**.  Client details screen |
|  | Click the drop-down boxes against **Title**, **Gender**, **Gross Family Weekly Income** **and Indigenous Origin** and select from the dropdown list for each.  Client details screen |
|  | Click the glyph next to **Address**. The Client Address window will open to insert the Client’s residential address.  Client details screen |
|  | Click **New**.  Client Address Screen  MCj02344440000[1]**Important Note:** Ensure that the residential address entered is the same as the address on the Client’s proof of residence document i.e. Centrelink Notification, utilities bill or rates invoice. |
|  | Enter the client’s address into the address fields and click **Find**.  Address validation Screen |
|  | A list of valid addresses will be displayed. Select correct residential address and click **OK**.  If the address doesn’t display as expected, contact the GPS Helpdesk on 1800 020 283.  Address Validation screen  MCj02344440000[1]**Important Note:** The software locates and geographically codes the client’s address to determine whether they live in an outer regional or remote location.  GPS uses this information to automatically assess the client’s eligibility for the Outer Regional and Remote Access Payment (OR&R). |
|  | Click the **Type** drop-down box then select **Residential** from the list.  Client Address pop up |
|  | Click **OK**.  Client Address pop up |
|  | To save the record select the Menu button (Menu) icon and click **Save Record**.  Save record option |
|  | Click the **hyperlink** on the Client’s last name to reopen the record.  MCj02344440000[1]Clients screen  **Important Note:** GPS will have given the record a unique Client Id that should be used for all correspondence about the client. |

## Origins View Tab

| Steps | Actions |
| --- | --- |
|  | Navigate to the **Origins** view tab.  Origins view tab |
|  | Scroll down to complete the Client’s Origin Details. Click each dropdown box and select the appropriate option.  Origins view tab |
|  | Save the record by selecting the Menu icon button (Menu) icon and clicking **Save Record**.  Save record highlighted |

## Disabilities View Tab

|  |  |
| --- | --- |
| **Steps** | **Actions** |
|  | Navigate to the **Disabilities** view tab.  Disabilities view tab. |
|  | Click the New button  (New) icon.  Disabilities view tab. |
|  | Click the dropdown box and select the appropriate disability from the list. This should be the child’s confirmed diagnosis e.g. Down syndrome.  For Better Start clients, select only N/A from Subtype drop-down list.  MCj02344440000[1]Disabilities screen view  **Important Note:** The Employer Disclosure field is not relevant to the Helping Children with Autism or Better Start Programs and defaults to ‘Not Applicable’. |
|  | Save the record by clicking the Save button (Save) icon.  Save button |

# Contacts View Tab

| **Steps** | **Actions** |
| --- | --- |
|  | Navigate to the **Contacts** view tab to enter a primary contact for this client.  Clients screen  MCj02344440000[1]**Important Note:** DSS provides the client’s family with a monthly family activity statement outlining any claims that have been made for services provided to the client, and the client’s remaining EI balances.  These details are emailed or mailed to the primary contact.  Please ensure that a valid email or postal address is recorded for the primary contact of each client. |
|  | Click the Clients screen (New) icon.  Contacts screen |
|  | Enter the contact’s **Last name**, **First Name** and **Email** in the fields shown below.  Contacts screen |
|  | Click the drop-down box and select the **Title** and **Relationship** to the Client.  Contacts screen |
|  | Click the glyph next to **Phone Number**. The Telephone Numbers window will open to insert the Contact’s phone number.  Contacts screen |
|  | Click the New button (New) icon.  Telephone numbers pop up |
|  | Enter all relevant fields then click the Save icon (Save) icon.  Telephone numbers pop up |
|  | Click **OK**.  Telephone numbers pop up |
|  | Click the glyph next to **Postal Address.** The Contact Addresses window will open to insert the Contact’s postal address.  Contacts screen |
|  | Click **New**.  Contacts address pop up screen |
|  | Enter the contact’s postal address and click **Find**.  A list of valid addresses will be displayed.  Contacts address pop up screen |
|  | Highlight the correct address then click **OK**.  If the address doesn’t display as expected, contact the GPS Helpdesk on 1800 020 283.  Address validation pop up |
|  | Click the drop-down box and select the **Type**.  Address validation pop up |
|  | Click **OK**.  Address validation pop up |
|  | Save the contact record by clicking the Save icon (Save) icon.  Contacts screen |

## Communication View Tab

| **Steps** | **Actions** |
| --- | --- |
|  | Navigate to the **Communication** view tab.  Communications view tab |
|  | Click the glyph next to **Phone Number**. The Telephone Numbers window will open to insert the client’s phone number.  Communications screen |
|  | Click the new icon (New) icon.  Telephone numbers pop up |
|  | Enter all relevant fields then click the Save Icon (Save) icon.  Telephone numbers pop up |
|  | Click **OK**.  Telephone numbers pop up |
|  | Enter the **Email** address.  Email address field highlighted |
|  | The Communication tab contains details of the client’s living arrangements, communication method and interpreter information. Entering information in this view is optional.  Enter information in relevant fields by clicking the arrow to the right of each item, which will show a dropdown list to select from.  Comminication screen |
|  | Save the record by clicking **Save.**  Save icon highlighted |

## EI More Info View Tab

| **Steps** | **Actions** |
| --- | --- |
|  | Navigate to the **EI More Info** view tab.  EI more info screen |
|  | Click the dropdown box and select **Eligibility Stream**, **Basis of Eligibility** and **Diagnosis Tool**. EI more info screen |
|  | MCj02344440000[1]**Important Note**: Diagnostic Tool is not required for Better Start. |
|  | Click the glyph to next to **Month/Year Diagnosis** to open the calendar. Select the **Month** and **Year.** Click **Done**.  Calendar pop up |
|  | Click the glyph next to **Siblings with Disabilities** (only if applicable). The Client Siblings with Disabilities window will open for information about the client’s siblings.  Siblings with Disabilities Field |
|  | Click the New Icon  (New) icon.  Client Siblings with Disabilities pop up |
|  | Enter information into all relevant fields then click the Save icon (Save) icon.  Client Siblings with Disabilities pop up |
|  | Click **OK**.  Client Siblings with Disabilities pop up |
|  | Click on the box next to **Eligible for EI Funding** – a tick will appear automatically to confirm the client’s eligibility.  Eligible for EI Funding tick box |
|  | Update the **Eligibility Start Date** field (if applicable) by clicking the glyph.  Eligibility Start Date field  MCj02344440000[1]**Important Note:** The Eligibility start date is usually the date that the client is deemed eligible by an Autism Advisor or the Better Start Registration and Information Service and is registered in GPS. |
|  | Save the record by clicking into the menu icon (Menu) icon and selecting **Save Record**.  Save record option |

## Assessments View Tab

| **Steps** | **Actions** |
| --- | --- |
|  | Navigate to the **Assessments** view tab.  Assessments screen tab |
|  | Click the New Icon  (New) icon.  Assessments screen |
|  | Click the glyph next to **Template Name.**  Assessments screen |
|  | Highlight the relevant **Checklist Template** for registering a new client then click **OK**. The relevant Template will then appear in the Description field.  Select Assessment template |
|  | Save the record by clicking the Save Icon  (Save) icon.  Assessments screen |
|  | Click the **Status** dropdown box and select **In Progress**.  Assessments screen |
|  | Click the dropdown box next to each item under **Answer**.  All questions must be answered before saving the record.  Client assessments |
|  | Save the record by clicking the Menu icon  (Menu) icon and selecting **Save Record**.  Client assessments screen |
|  | Click the **Status** drop down boxand select **Completed** from the drop down list.  Client assessments screen |
|  | Once satisfied that the assessment has been competed correctly, click the **Status** dropdown box again and select **Authorised**.  This step may be performed by another staff member in your organisation to ensure data quality.  Client assessments screen |
|  | Save the record by clicking the Save icon  (Save) icon.  Client assessments screen |

## EI Details Verified

| **Steps** | **Actions** |
| --- | --- |
|  | Once satisfied all information has been entered correctly on the Origins, Disabilities, Contacts, Communication, EI More Info, Assessments view tabs, click the Show More button.  Clients screen |
|  | Then tick the **EI Details Verified** box.  Client details screen  MCj02344440000[1]**Important Note:** If the tick box is not able to be ticked, ensure you have entered all required information on the Origins, Disabilities, Contacts, Communication, EI More Info, and Assessments view tabs. |
|  | Save the record by clicking the Save Icon  (Save) icon.  Save Icon |
|  | If applicable, you will now also be required to create a new Case record.  For instructions on how to create a new case follow task card or training video **Autism Advisor and Better Start Registration and Information Service Create a New Case Record to create a new case 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)