Australian Government
Department of Social Services

Creating a New Client Record

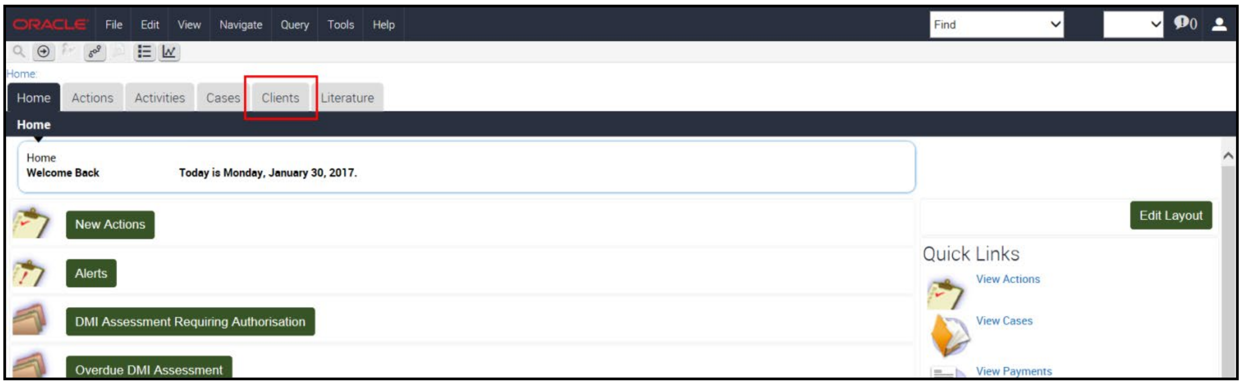
Disability Case Portal (DCP)

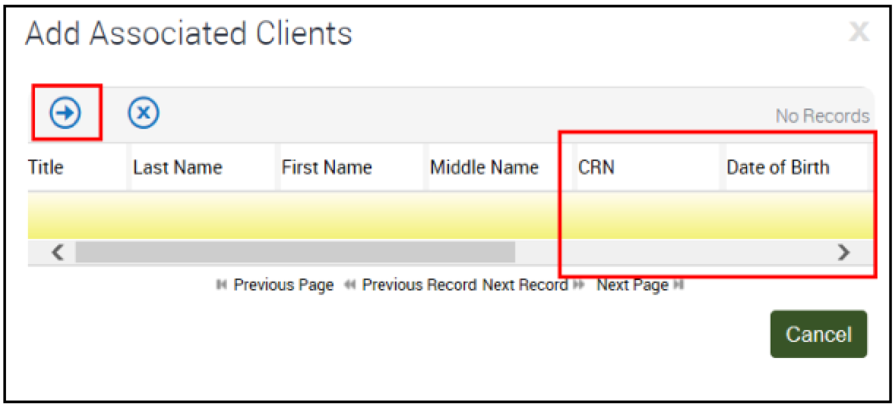
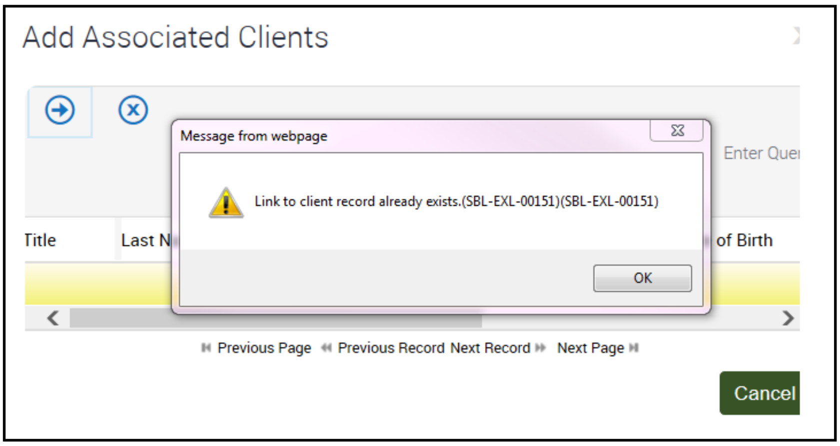
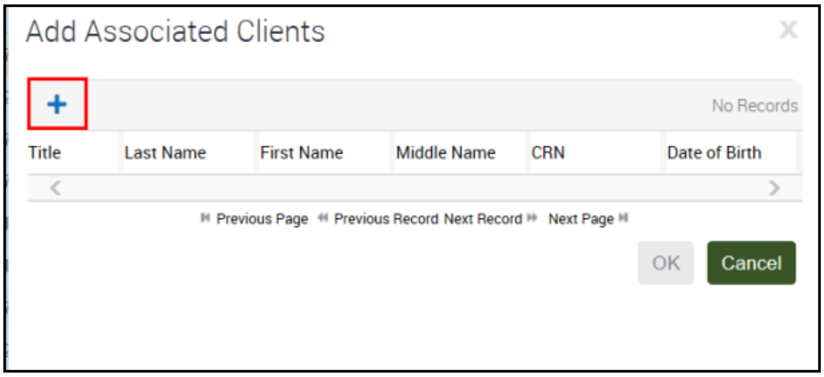
Autism Advisor or Better Start Information and Registration Service

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.

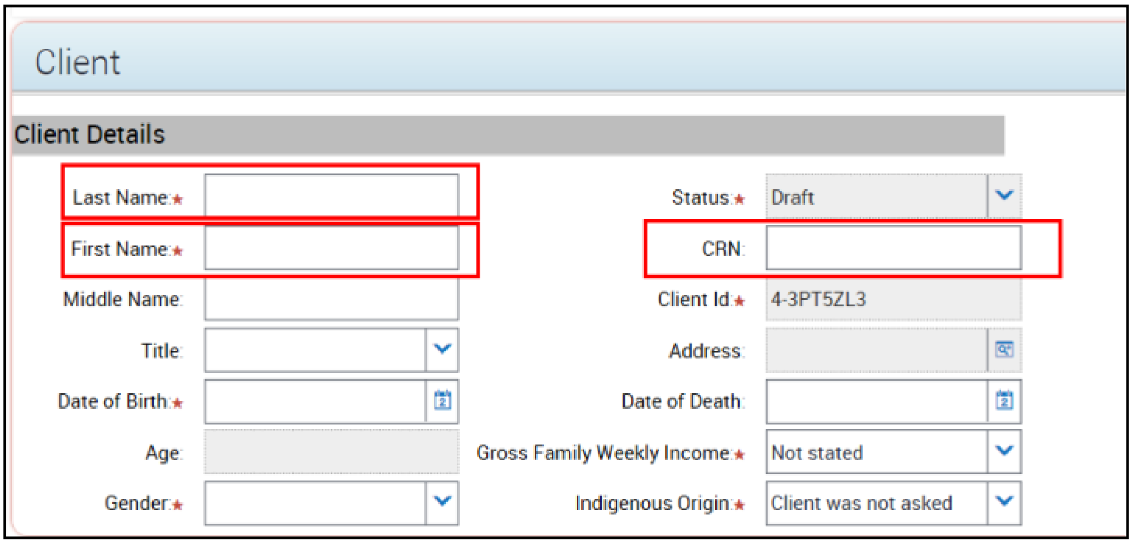
Portal Access:

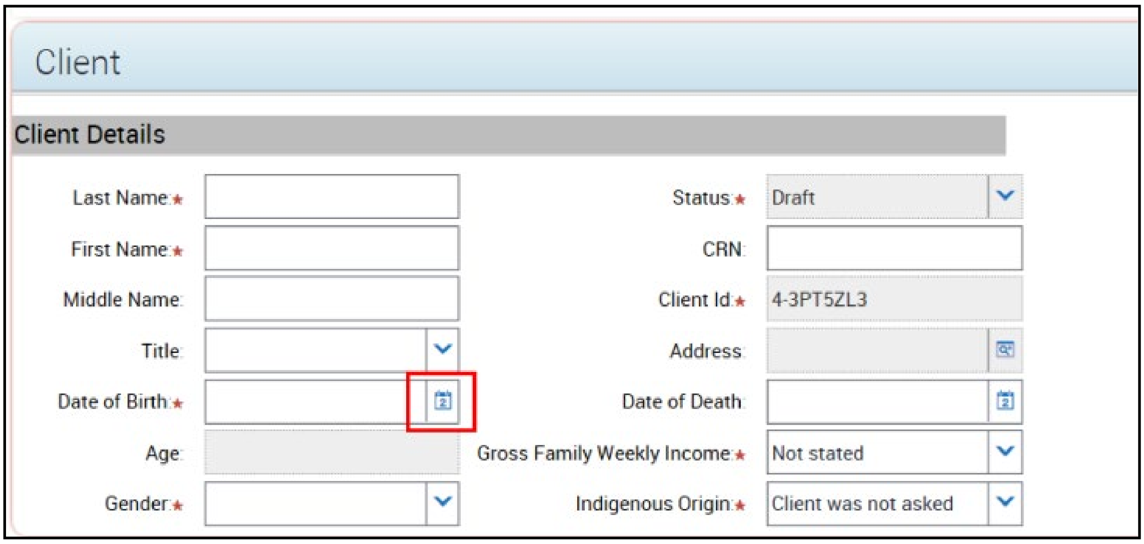
Access the internet and log in to DCP at https://portal.dss.gov.au/fofmsportal

Steps	Actions
1	Navigate to the **Clients** screen by clicking on the Clients tab. 
2	DCP displays a list of clients currently associated to your organisation. To create a new Client record, click the + (New) icon. 

Steps	Actions
3	Enter the Client's **Customer Reference Number (CRN)** and **Date of Birth** and then click the (Go) icon.  **Important Note:** If the following message appears, a record for this client already exists. 
4	If no record is displayed, select the (New) icon to create a new Client record. 

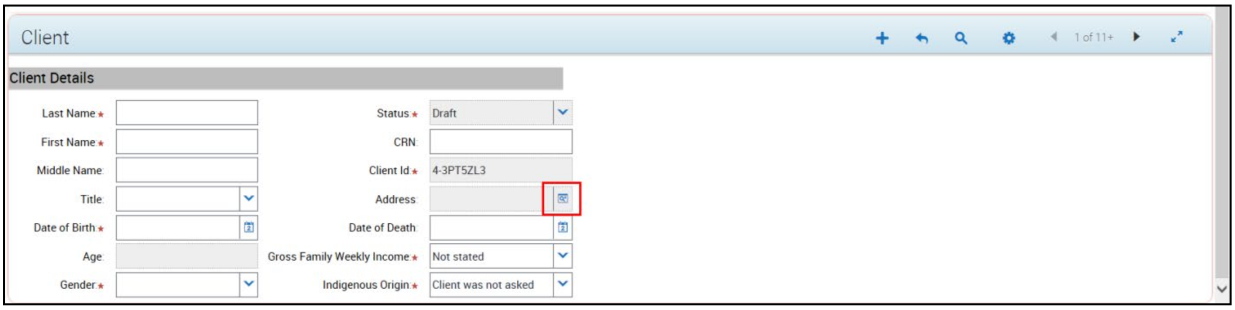
<table>
<tr><th>Steps</th><th>Actions</th></tr>
<tr><td>5</td><td>Scroll down the screen to enter the client’s Last Name, First Name and CRN.


</td></tr>
<tr><td>6</td><td>Click the glyph and select the Date of Birth.

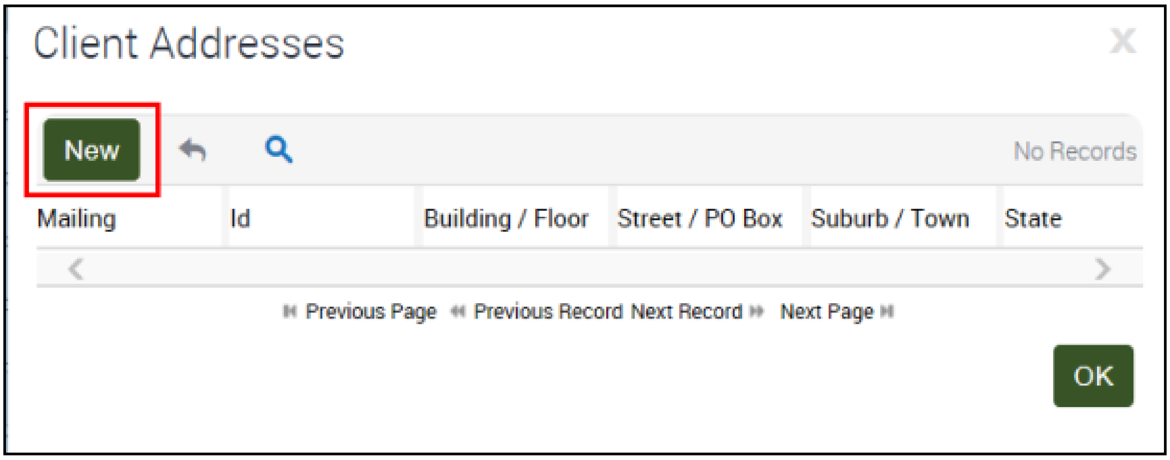

</td></tr>
<tr><td>7</td><td>Click the drop-down boxes against Title, Gender, Gross Family Weekly Income and Indigenous Origin and select from the dropdown list for each.

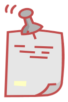

</td></tr>
</table>

<table>
<tr><th>Steps</th><th>Actions</th></tr>
<tr><td>8</td><td>Click the glyph next to Address. The Client Address window will open to insert the Client’s residential address.

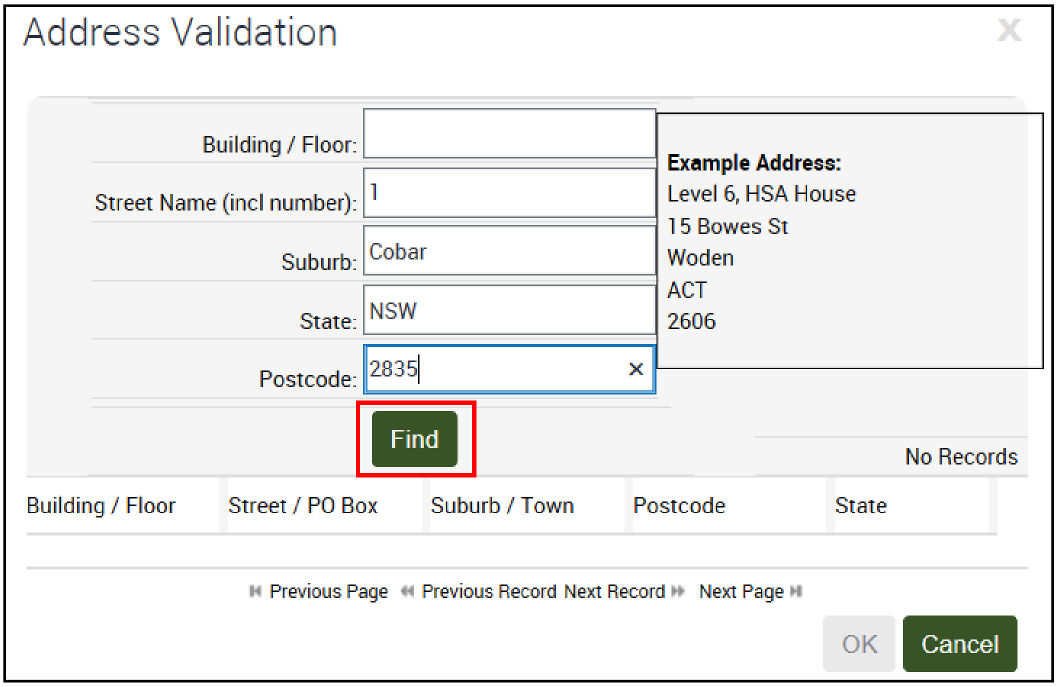


</td></tr>
<tr><td>9</td><td>Click New.





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.
</td></tr>
<tr><td>10</td><td>Enter the client’s address into the address fields and click Find.

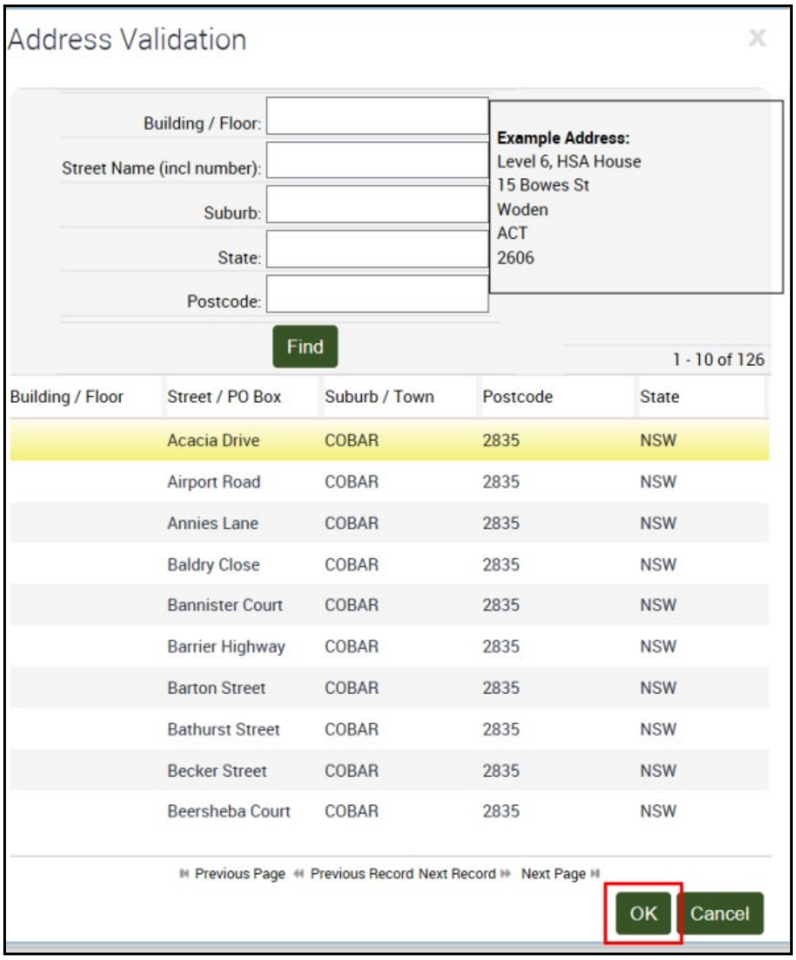


</td></tr>
</table>

<table>
<tr><th>Steps</th><th>Actions</th></tr>
<tr><td>11</td><td>

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.

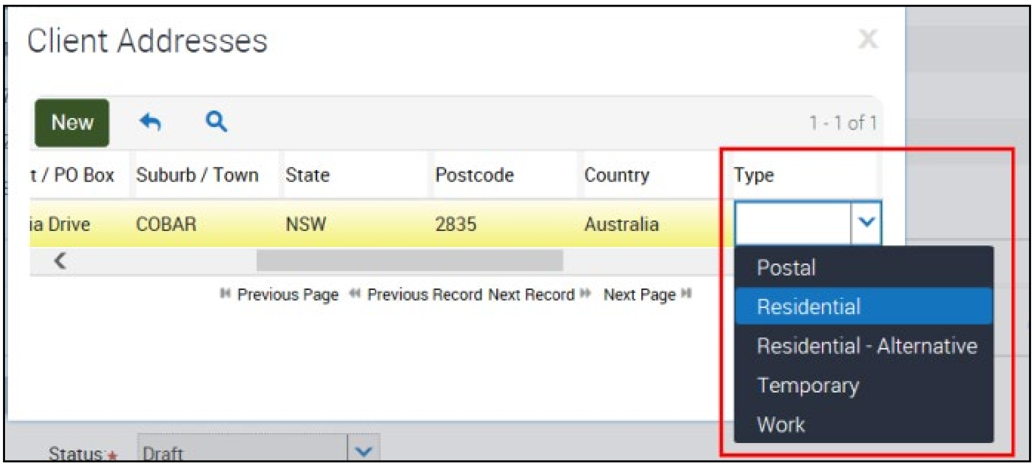


Important Note: The software locates and geographically codes the client's address to determine whether they live in an outer regional or remote location.

GPS uses this information to automatically assess the client's eligibility for the Outer Regional and Remote Access Payment (OR&R).

</td></tr>
<tr><td>12</td><td>

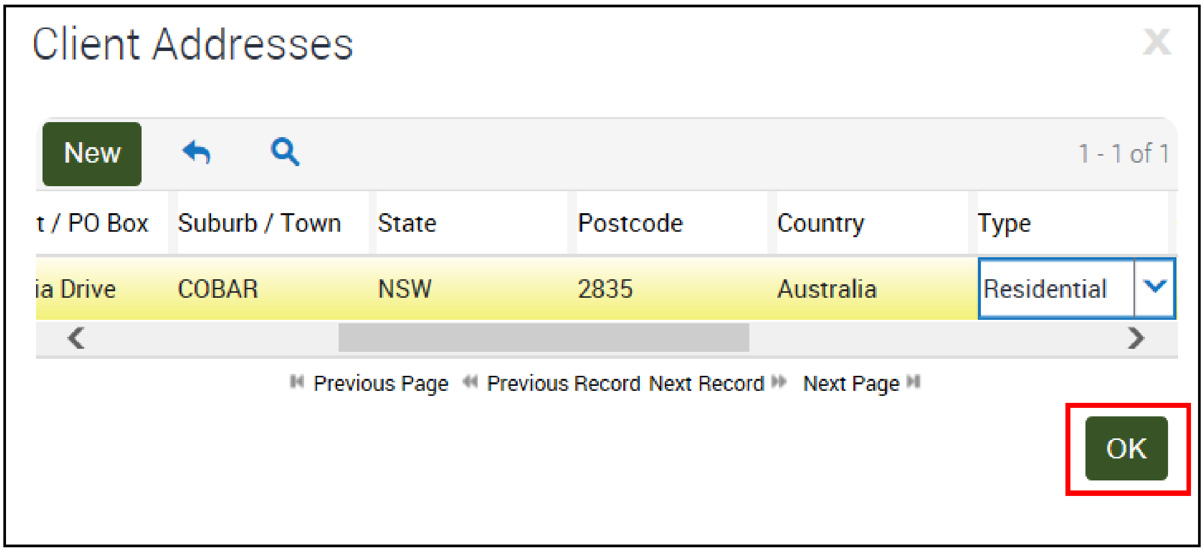
Click the **Type** drop-down box then select **Residential** from the list.



</td></tr>
</table>

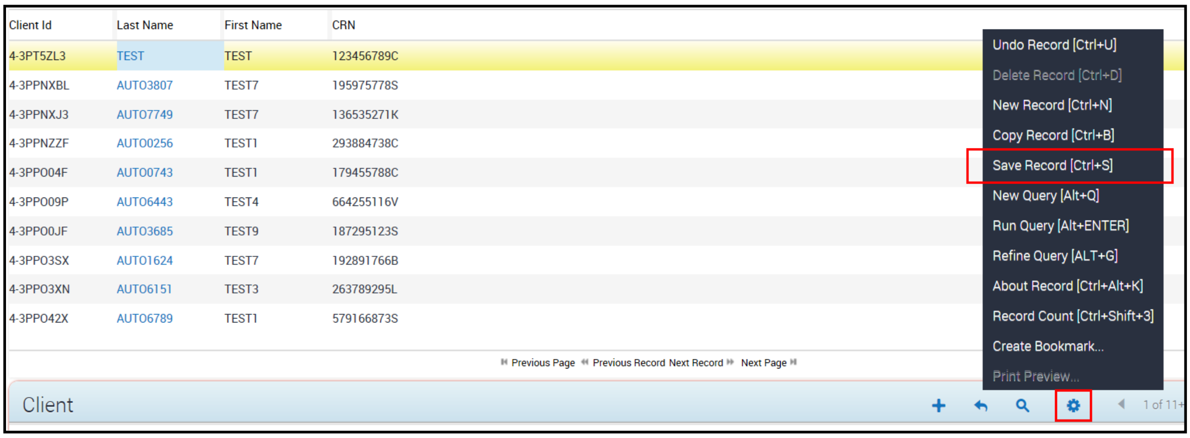
<table>
<tr><th>Steps</th><th>Actions</th></tr>
<tr><td>13</td><td>

Click **OK**.



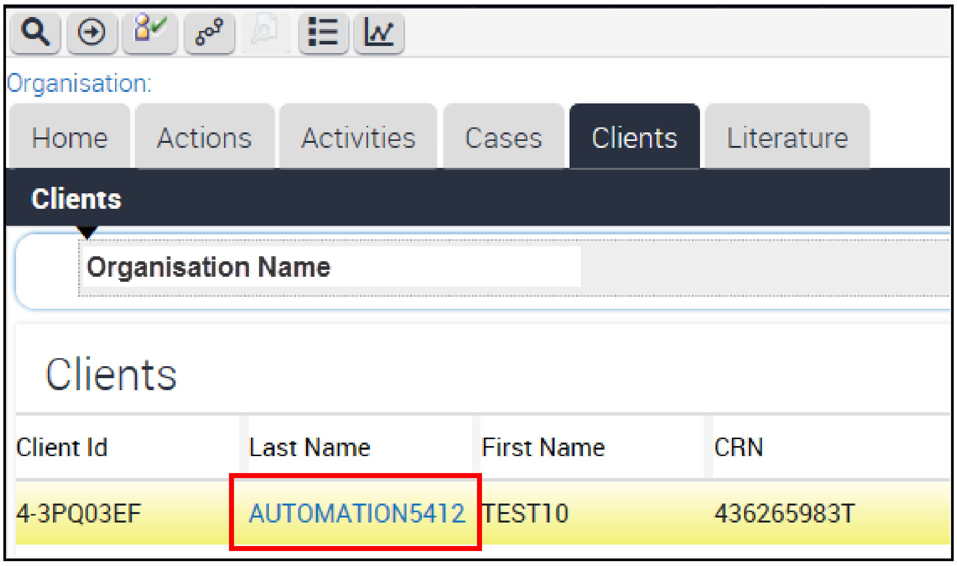
</td></tr>
<tr><td>14</td><td>

To save the record select the (Menu) icon and click **Save Record**.



</td></tr>
<tr><td>15</td><td>

Click the **hyperlink** on the Client's last name to reopen the record.

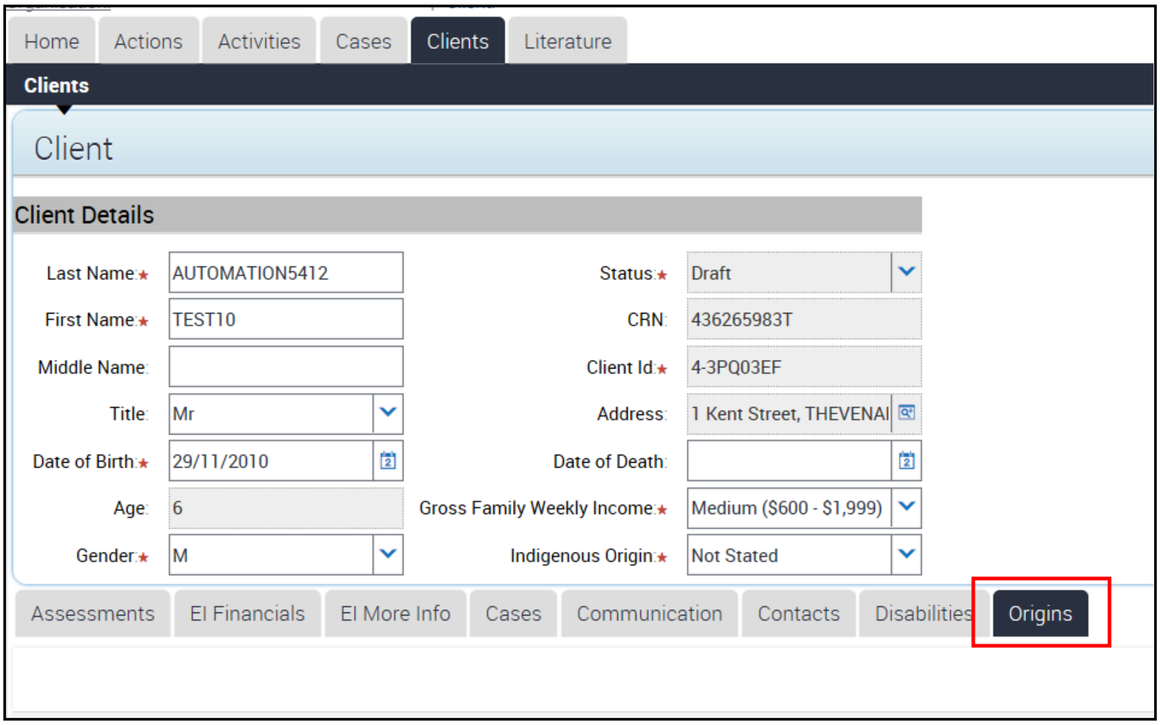


Important Note: GPS will have given the record a unique Client Id that should be used for all correspondence about the client.

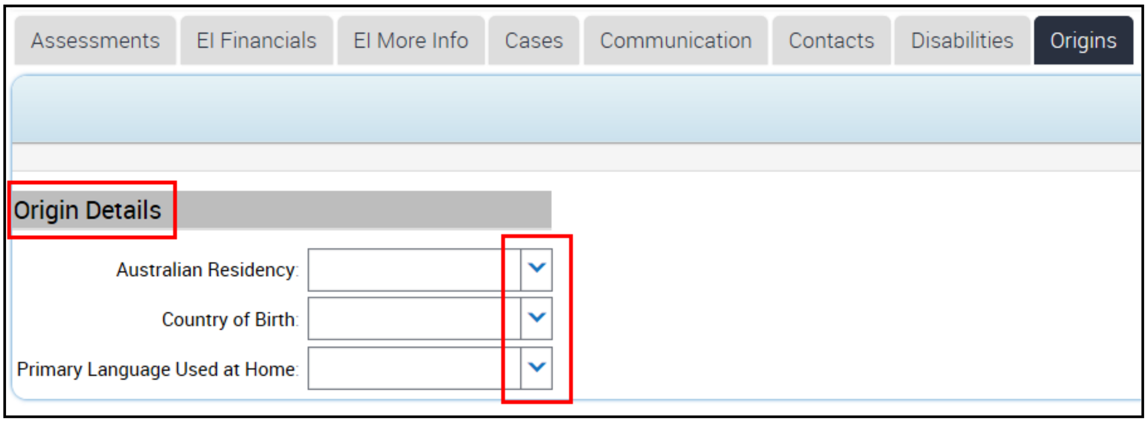
</td></tr>
</table>

Origins View Tab

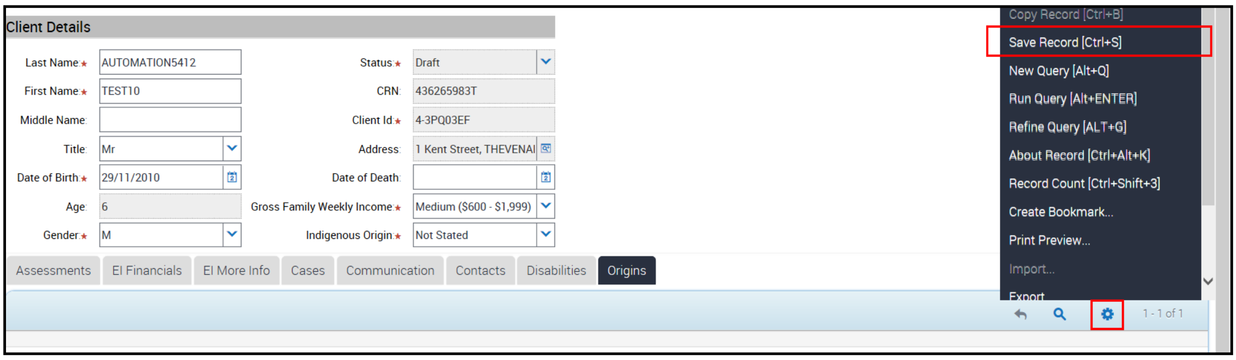
<table>
<tr><th>Steps</th><th>Actions</th></tr>
<tr><td>1</td><td>Navigate to the Origins view tab.



</td></tr>
<tr><td>2</td><td>Scroll down to complete the Client's Origin Details. Click each dropdown box and select the appropriate option.



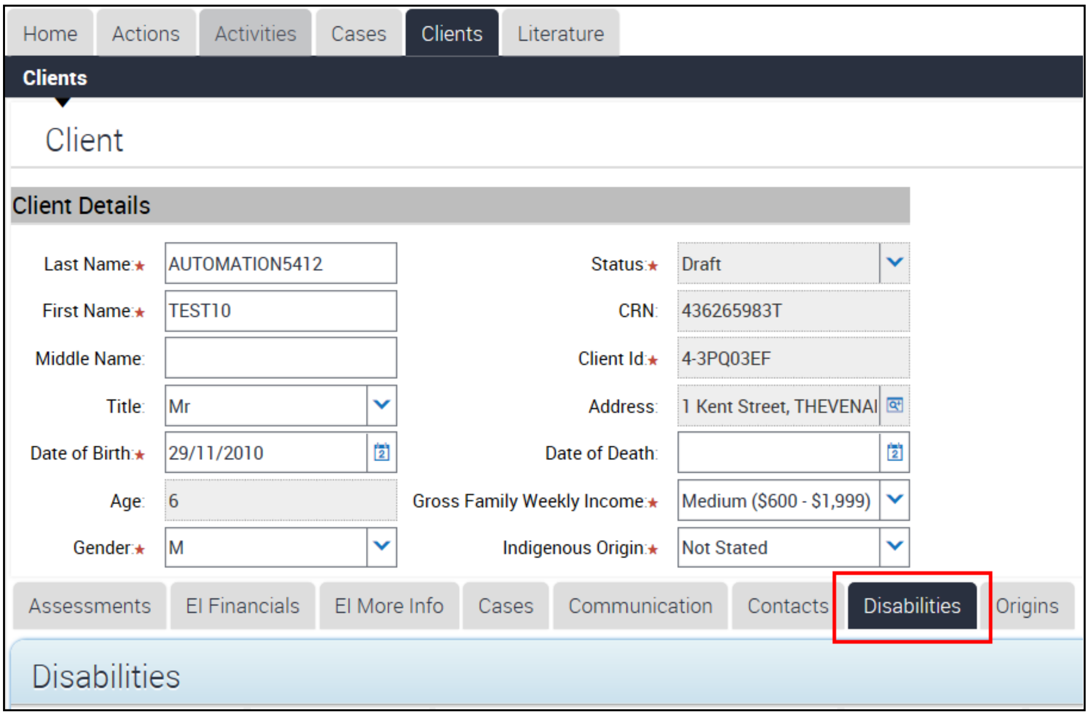
</td></tr>
<tr><td>3</td><td>Save the record by selecting the (Menu) icon and clicking Save Record.



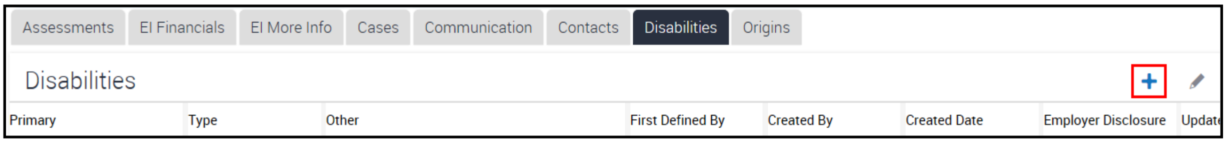
</td></tr>
</table>

Disabilities View Tab

<table>
<tr><th>Steps</th><th>Actions</th></tr>
<tr><td>1</td><td>
Navigate to the **Disabilities** view tab.

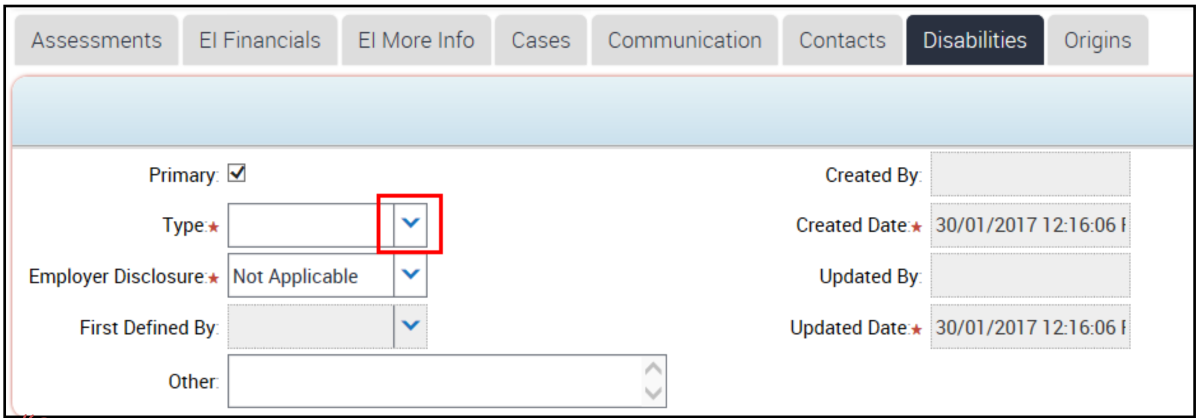


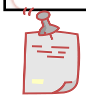
</td></tr>
<tr><td>2</td><td>
Click the + (New) icon.

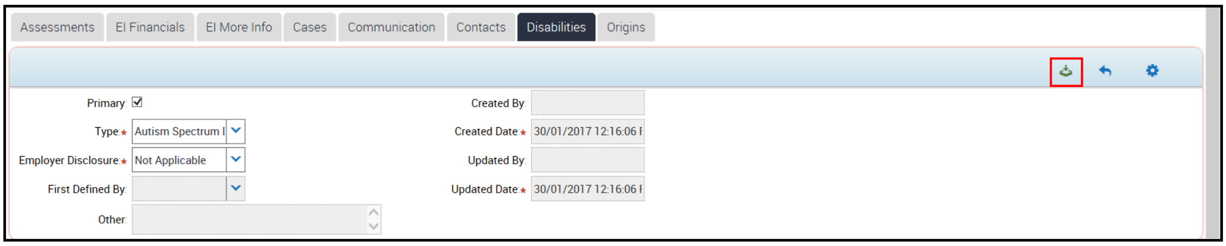


</td></tr>
<tr><td>3</td><td>
Click the dropdown box and select the appropriate disability from the list. This should be the child’s confirmed diagnosis e.g. Down syndrome.

For Better Start clients, select only N/A from Subtype drop-down list.



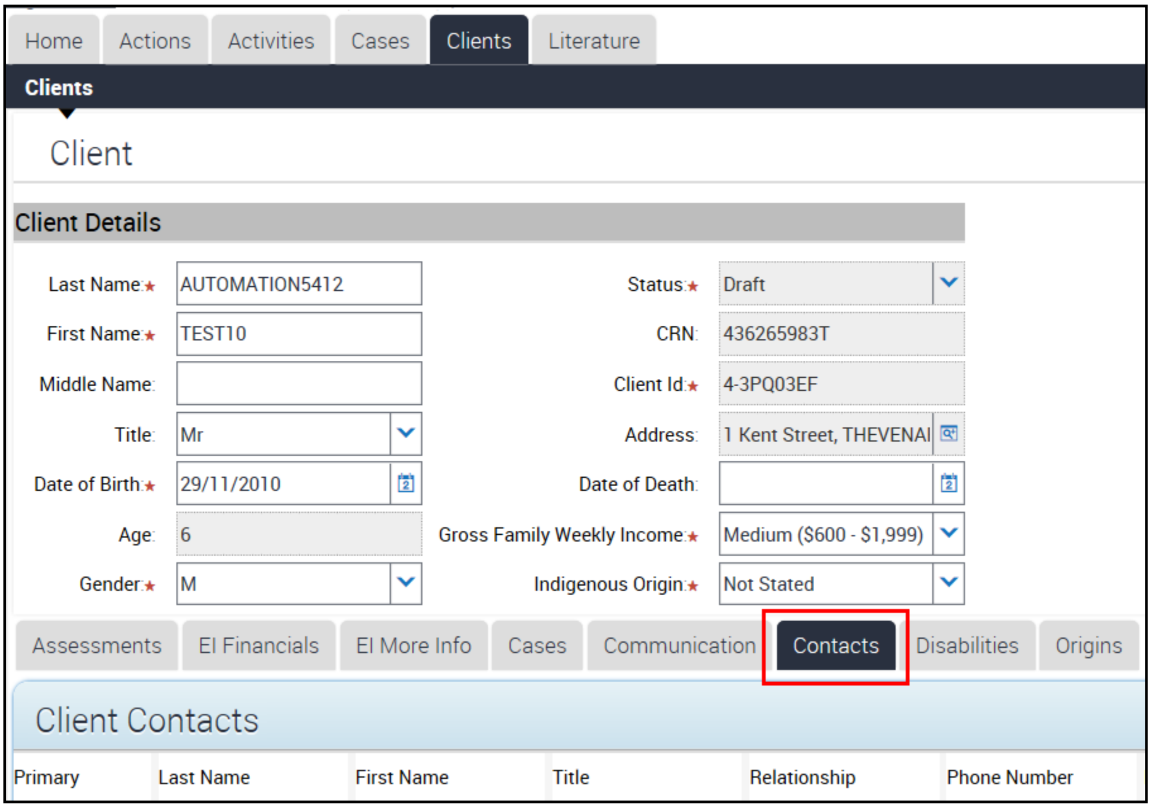

Important Note: The Employer Disclosure field is not relevant to the Helping Children with Autism or Better Start Programs and defaults to ‘Not Applicable’.
</td></tr>
</table>

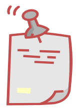
4	Save the record by clicking the (Save) icon. 

Contacts View Tab

<table>
<tr><th>Steps</th><th>Actions</th></tr>
<tr><td>1</td><td>

Navigate to the **Contacts** view tab to enter a primary contact for this client.





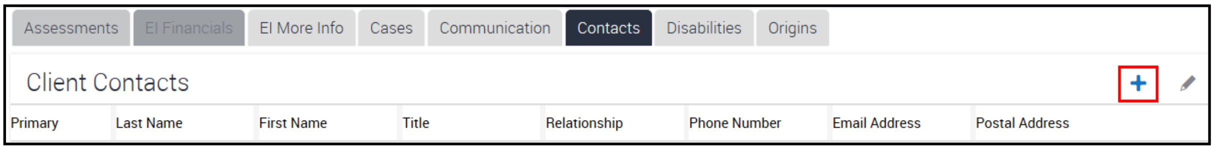
Important Note: DSS provides the client's family with a monthly family activity statement outlining any claims that have been made for services provided to the client, and the client's remaining EI balances.

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.

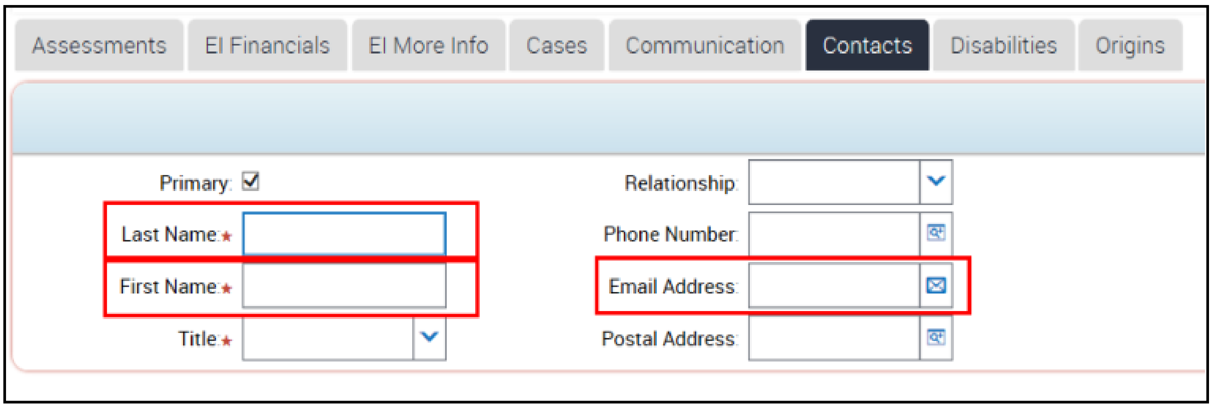
</td></tr>
<tr><td>2</td><td>

Click the  (New) icon.

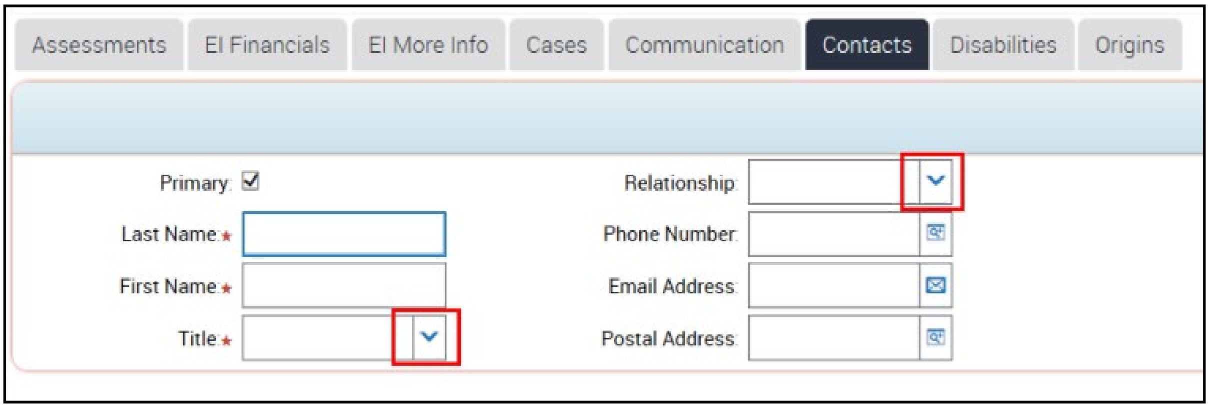
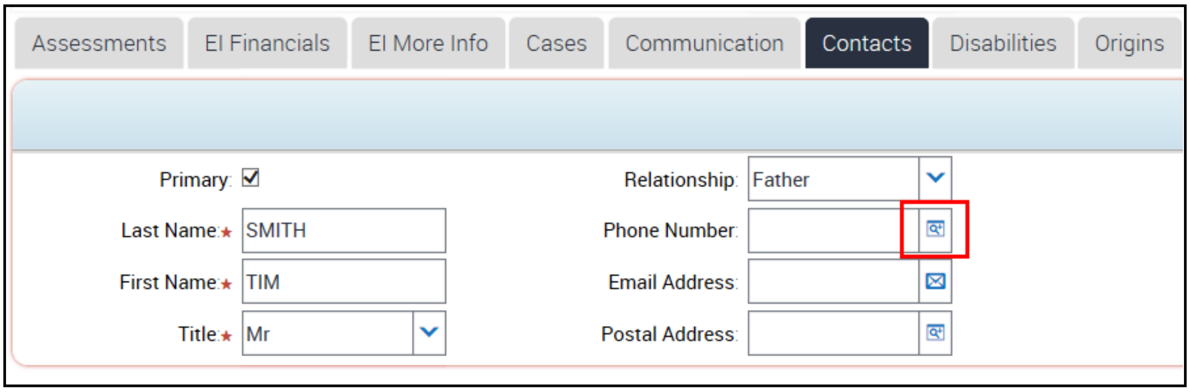
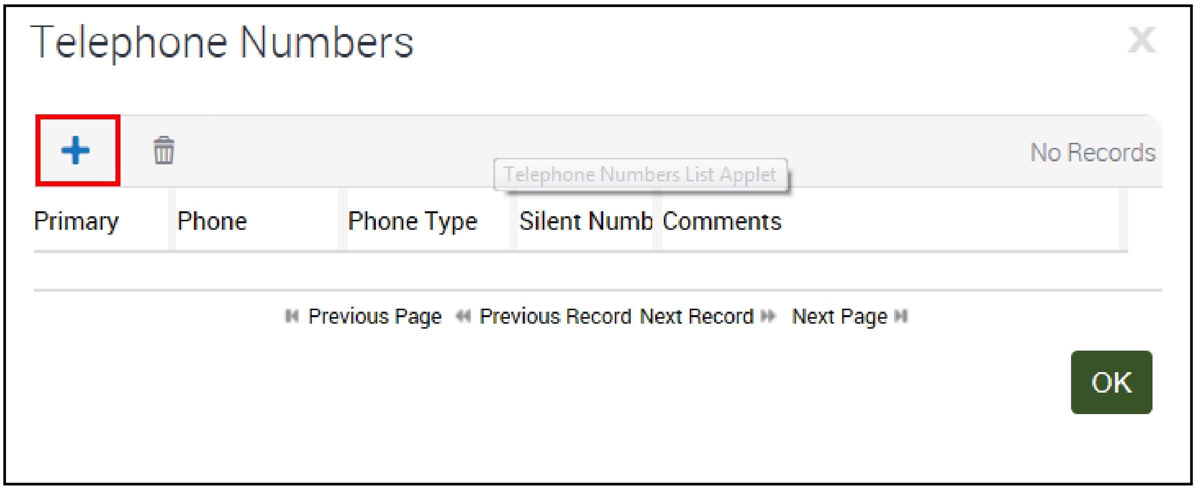


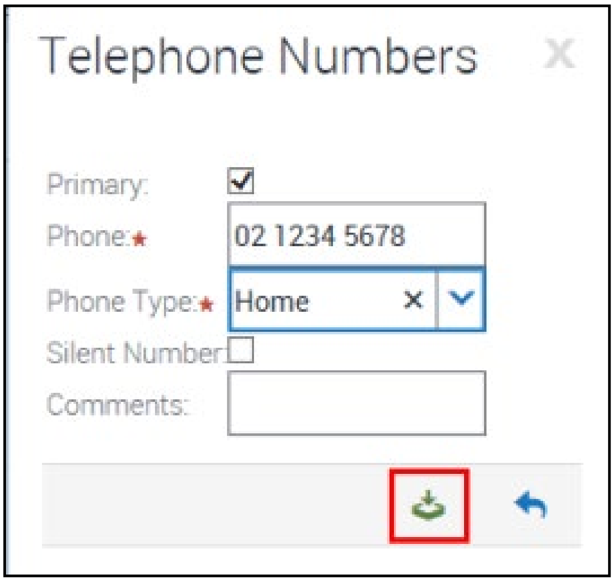
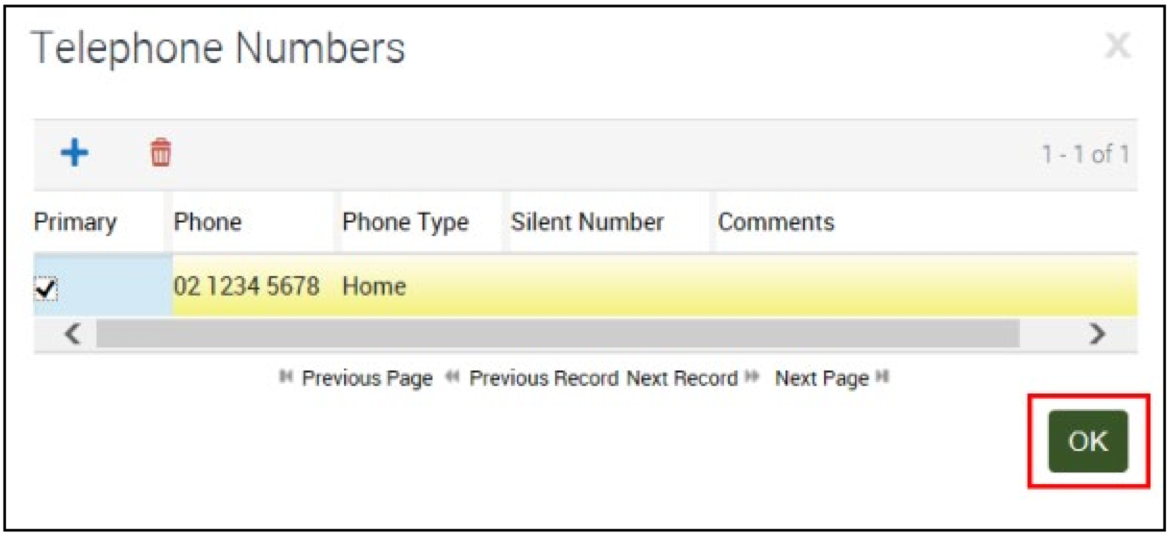
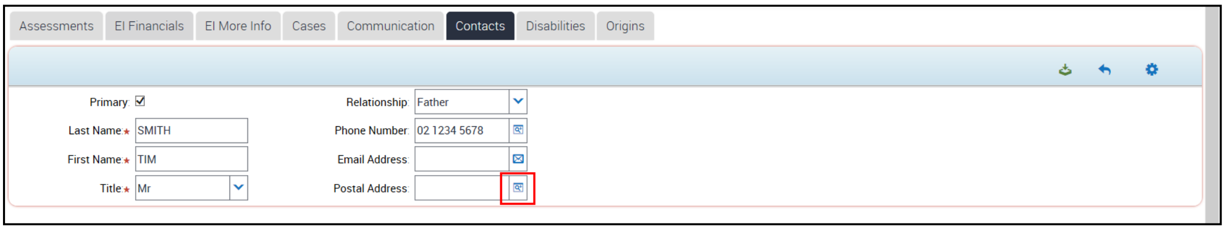
</td></tr>
<tr><td>3</td><td>

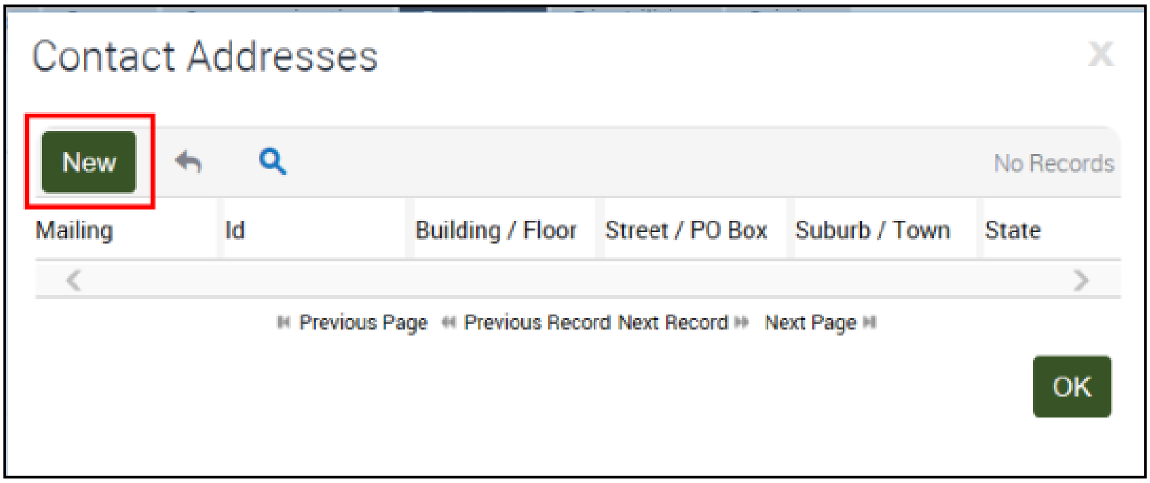
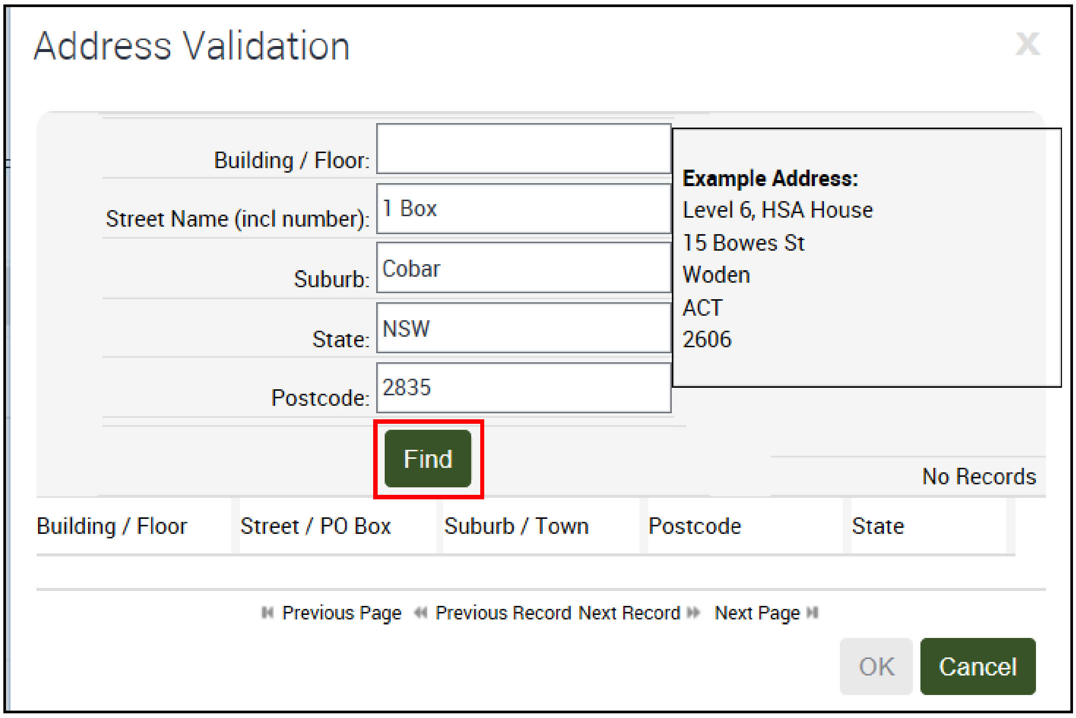
Enter the contact's **Last name**, **First Name** and **Email** in the fields shown below.



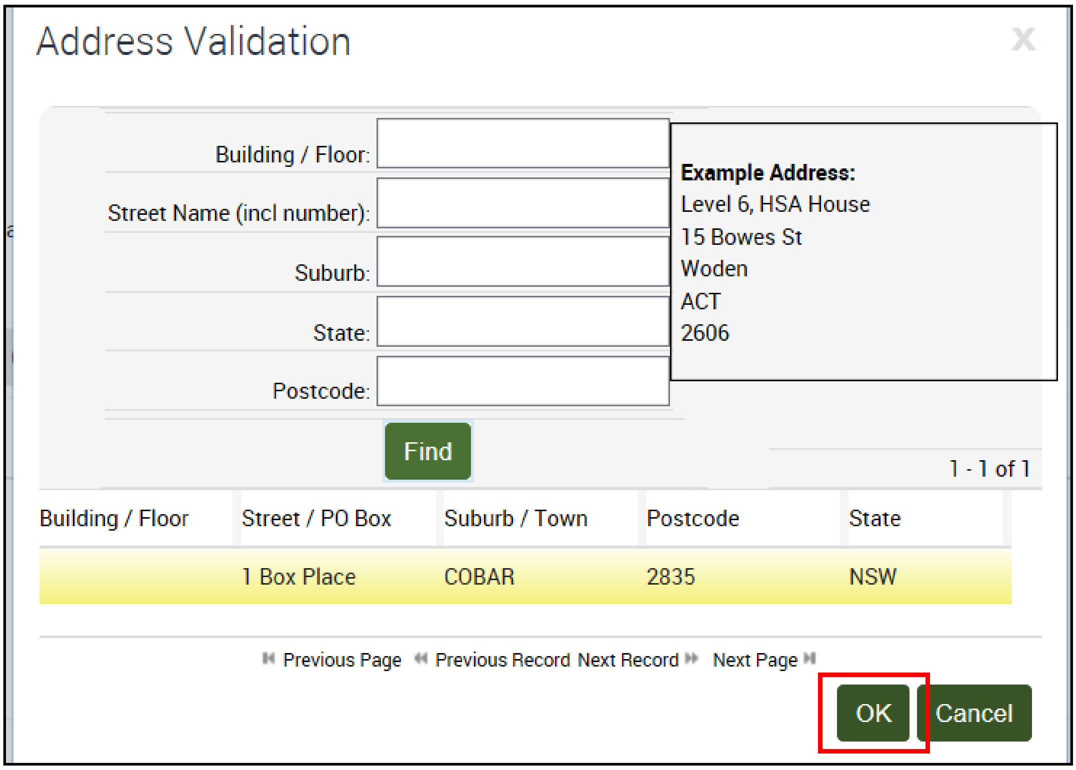
</td></tr>
</table>

Steps	Actions
4	Click the drop-down box and select the **Title** and **Relationship** to the Client. 
5	Click the glyph next to **Phone Number**. The Telephone Numbers window will open to insert the Contact's phone number. 
6	Click the (New) icon. 

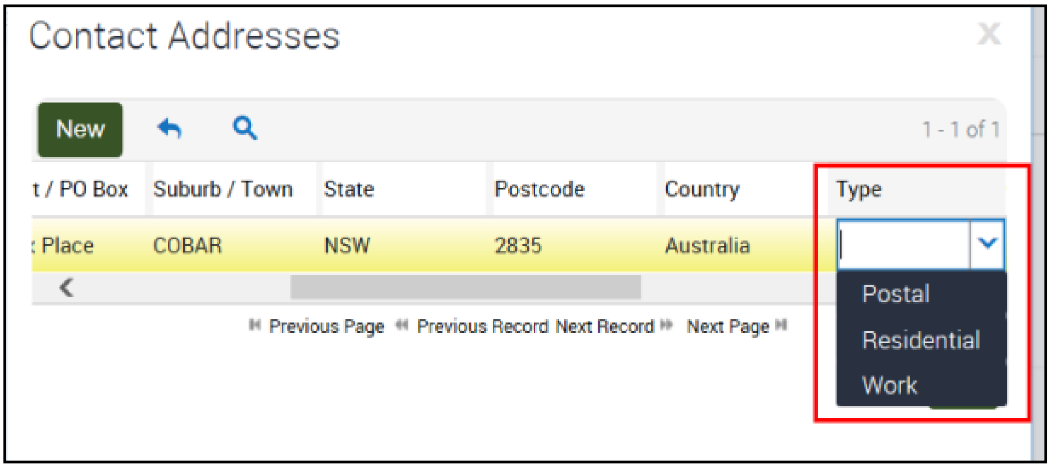
Steps	Actions
7	Enter all relevant fields then click the (Save) icon. 
8	Click **OK**. 
9	Click the glyph next to **Postal Address.** The Contact Addresses window will open to insert the Contact's postal address. 

<table>
<tr><th>Steps</th><th>Actions</th></tr>
<tr><td>10</td><td>Click New.

</td></tr>
<tr><td>11</td><td>Enter the contact’s postal address and click Find.
A list of valid addresses will be displayed.

</td></tr>
</table>

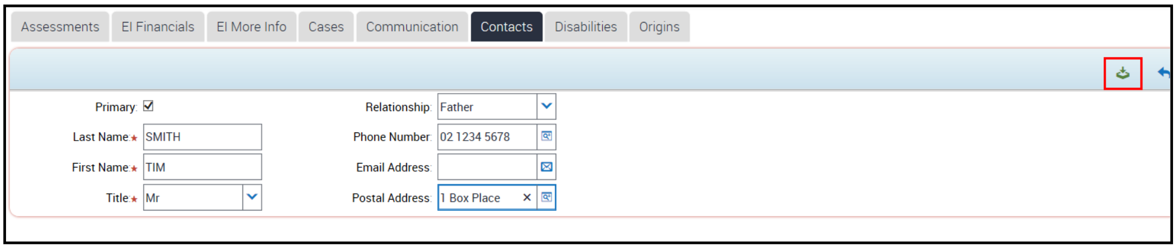
<table>
<tr><th>Steps</th><th>Actions</th></tr>
<tr><td>12</td><td>Highlight the correct address then click OK.
If the address doesn’t display as expected, contact the GPS Helpdesk on 1800 020 283.



</td></tr>
<tr><td>13</td><td>Click the drop-down box and select the Type.

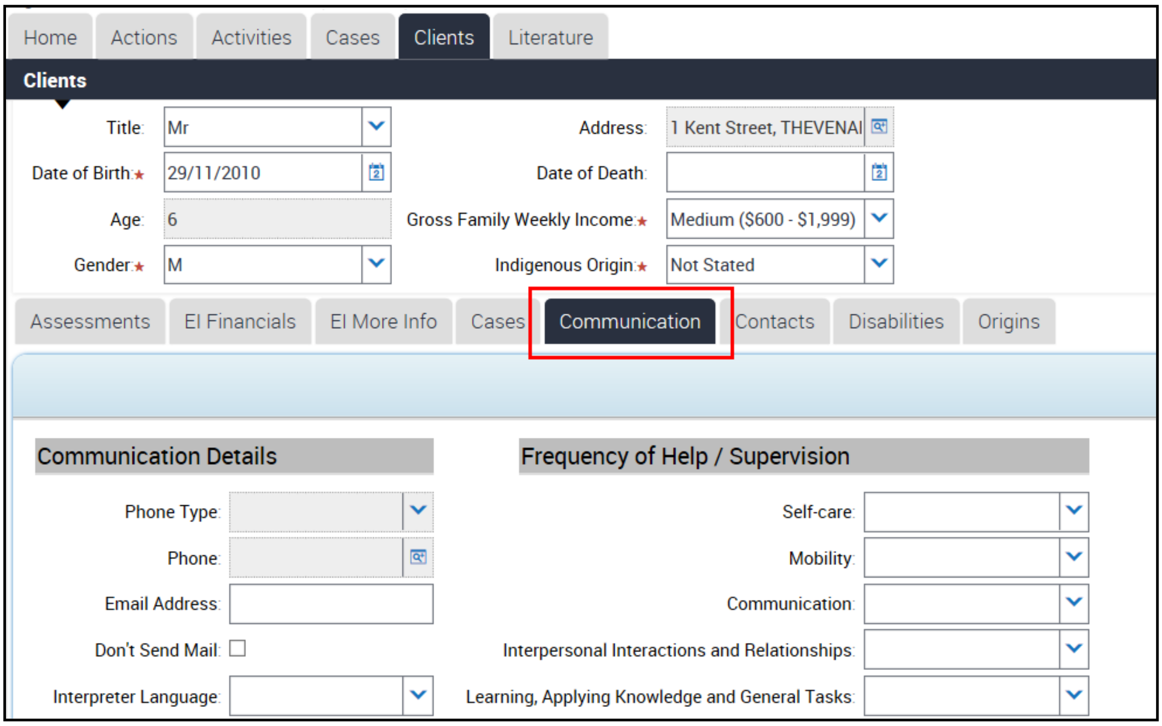


</td></tr>
</table>

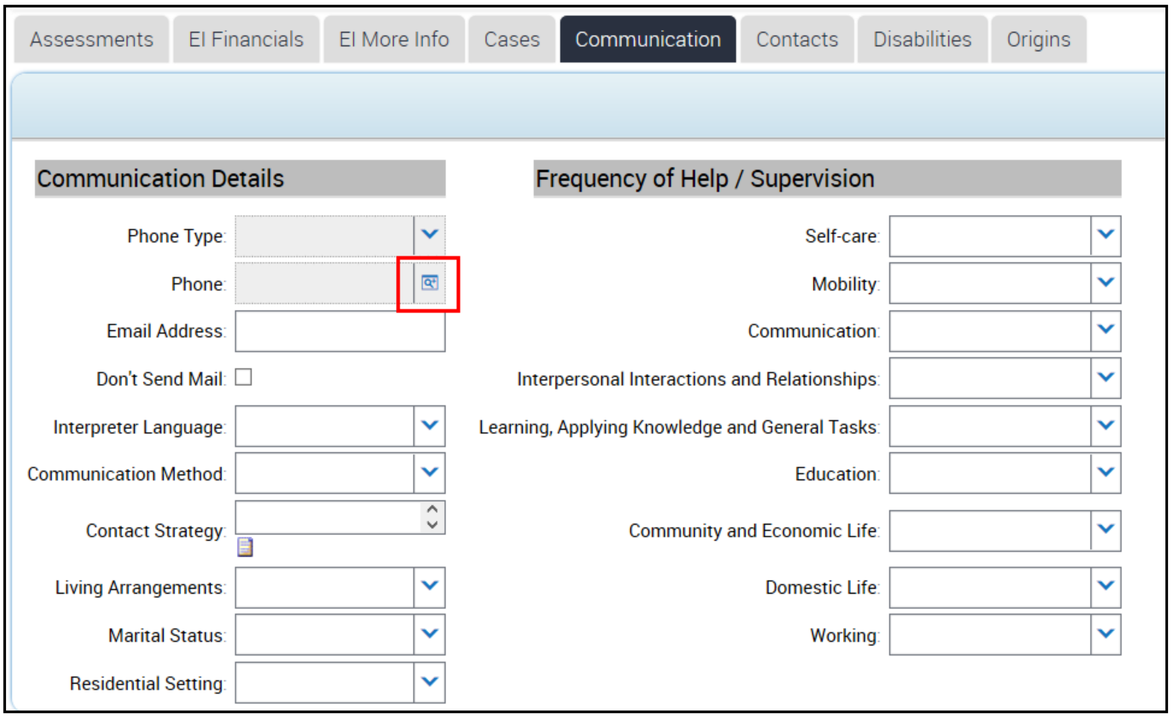
Steps	Actions
14	Click **OK**. 
15	Save the contact record by clicking the (Save) icon. 

Communication View Tab

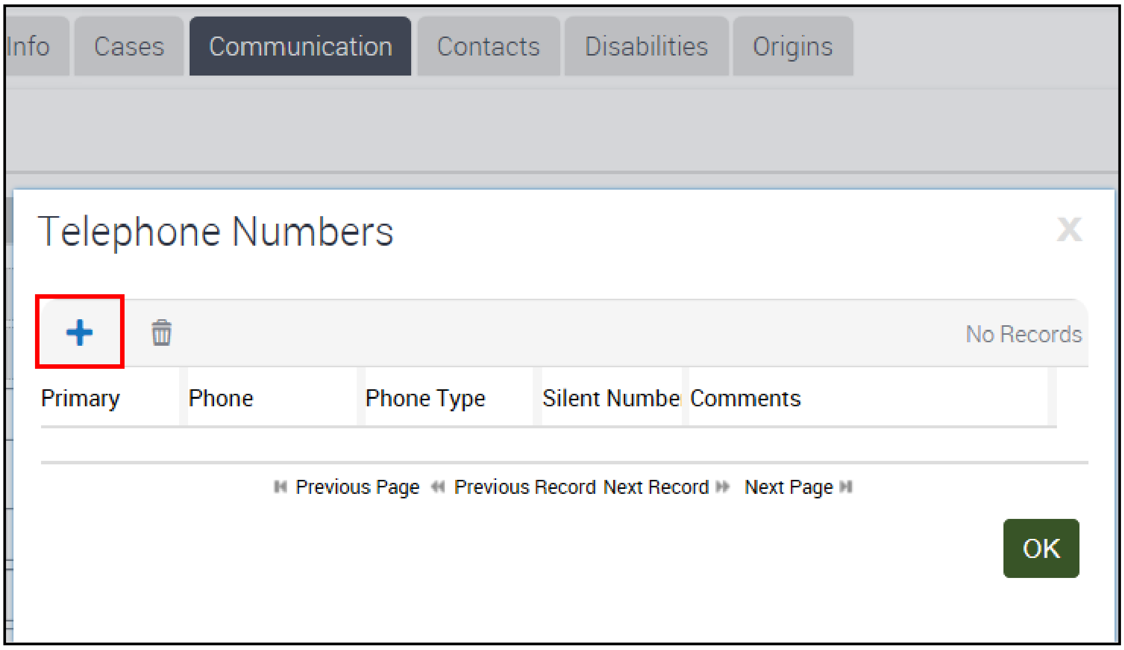
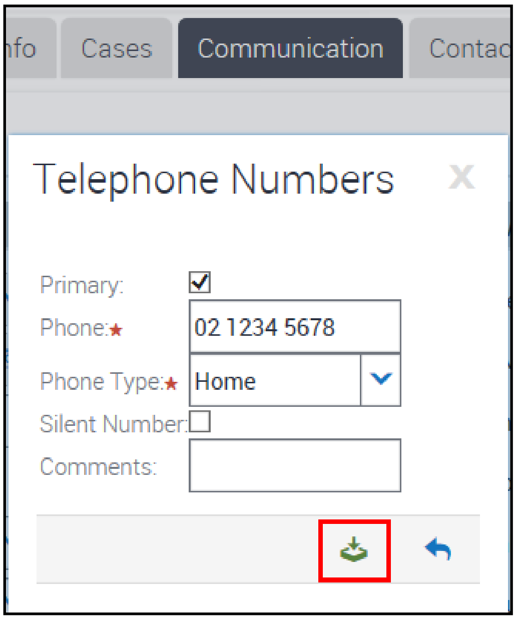
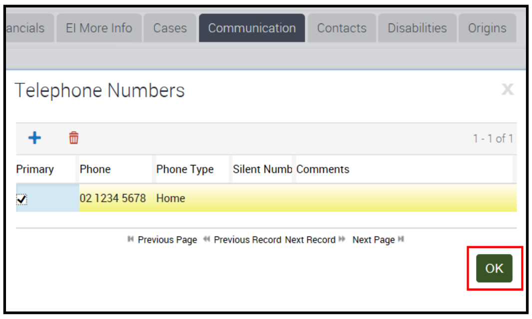
<table>
<tr><th>Steps</th><th>Actions</th></tr>
<tr><td>1</td><td>Navigate to the Communication view tab.



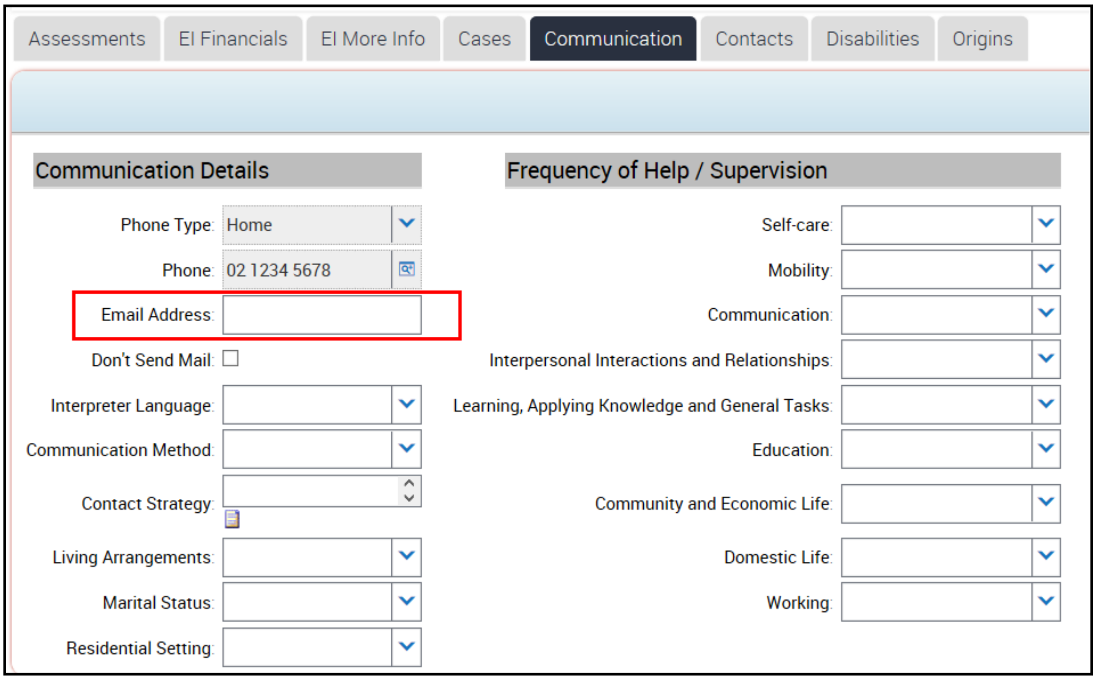
</td></tr>
<tr><td>2</td><td>Click the glyph next to Phone Number. The Telephone Numbers window will open to insert the client’s phone number.



</td></tr>
</table>

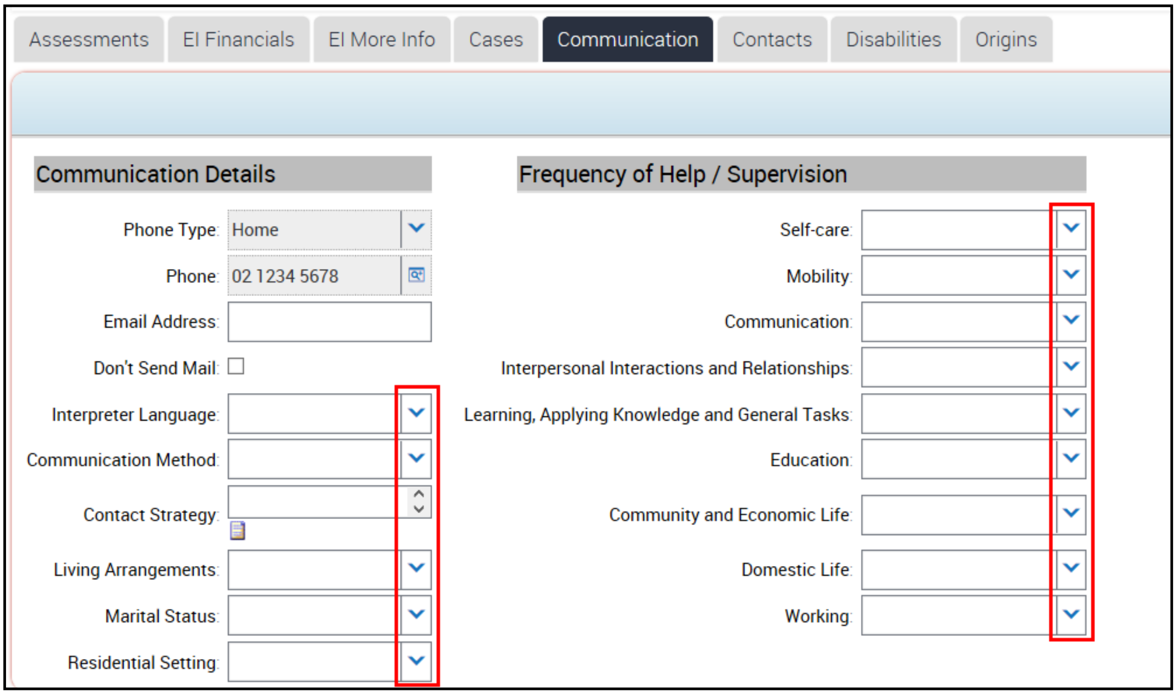
Steps	Actions
3	Click the (New) icon. 
4	Enter all relevant fields then click the (Save) icon. 
5	Click **OK**. 

<table>
<tr><th>Steps</th><th>Actions</th></tr>
<tr><td>6</td><td>
Enter the Email address.

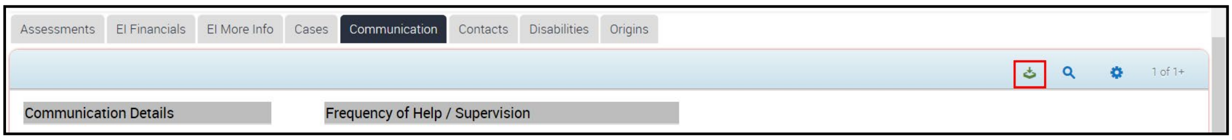


</td></tr>
<tr><td>7</td><td>
The Communication tab contains details of the client's living arrangements, communication method and interpreter information. Entering information in this view is optional.

Enter information in relevant fields by clicking the arrow to the right of each item, which will show a dropdown list to select from.

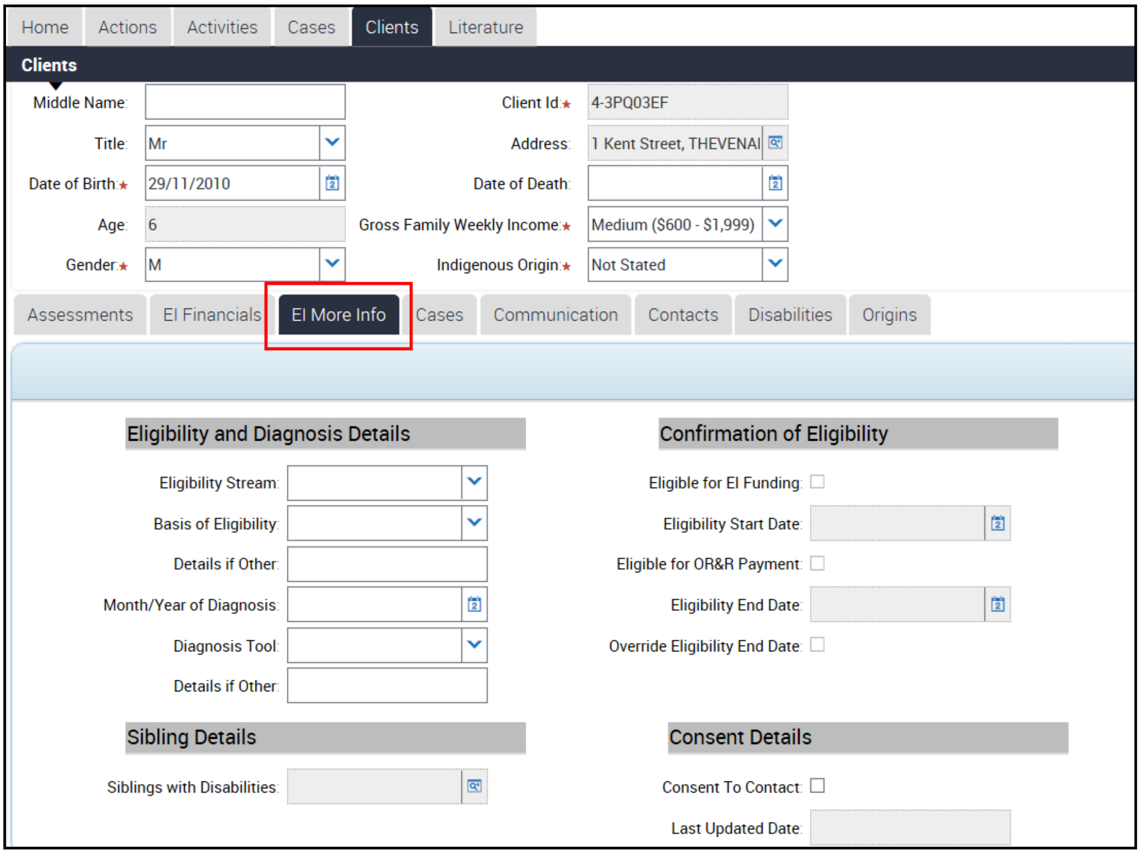
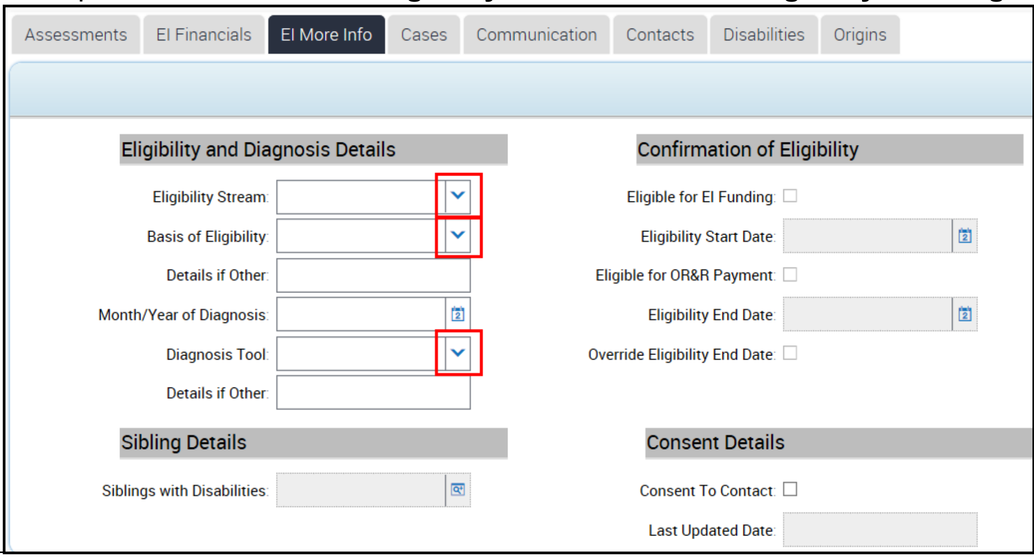


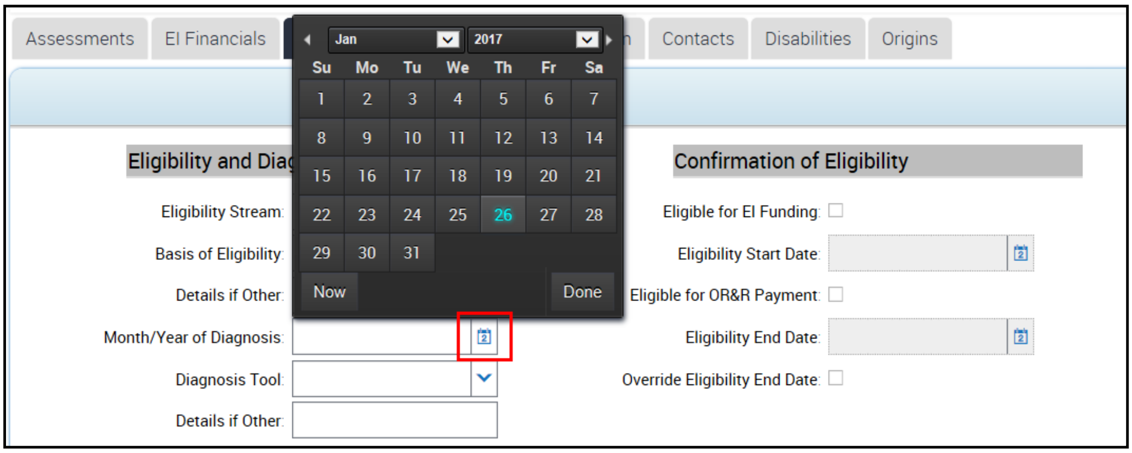
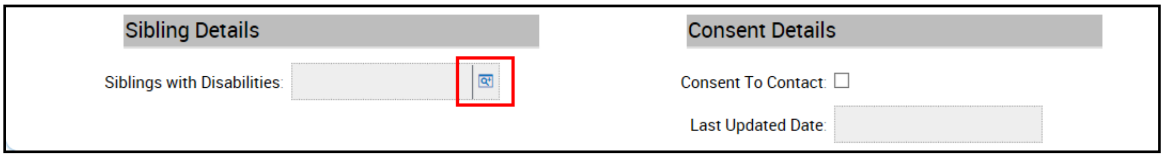
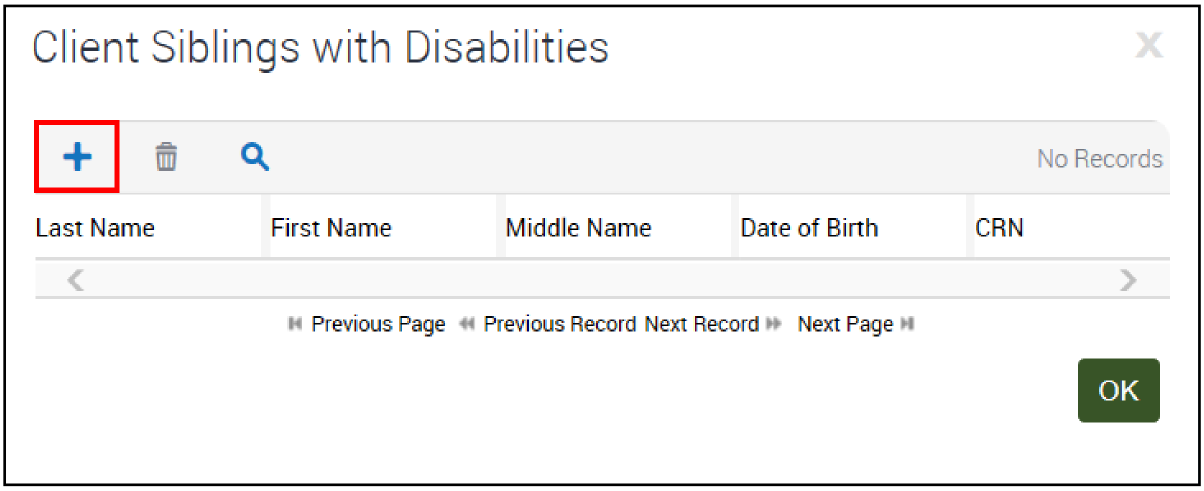
</td></tr>
<tr><td>8</td><td>
Save the record by clicking Save.

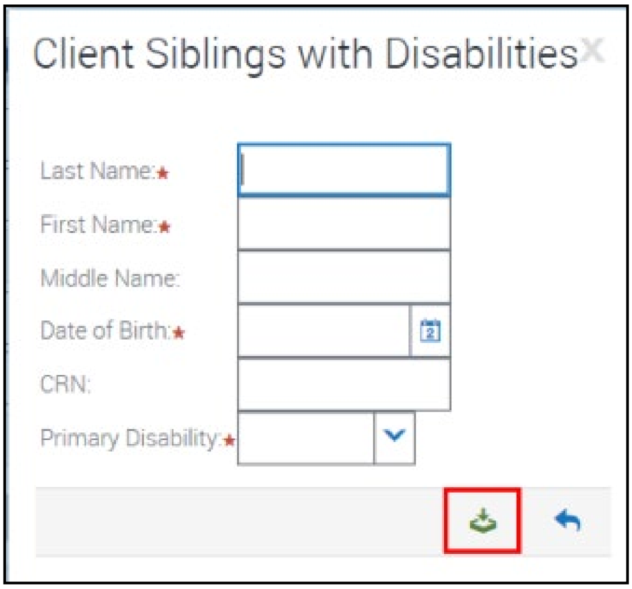
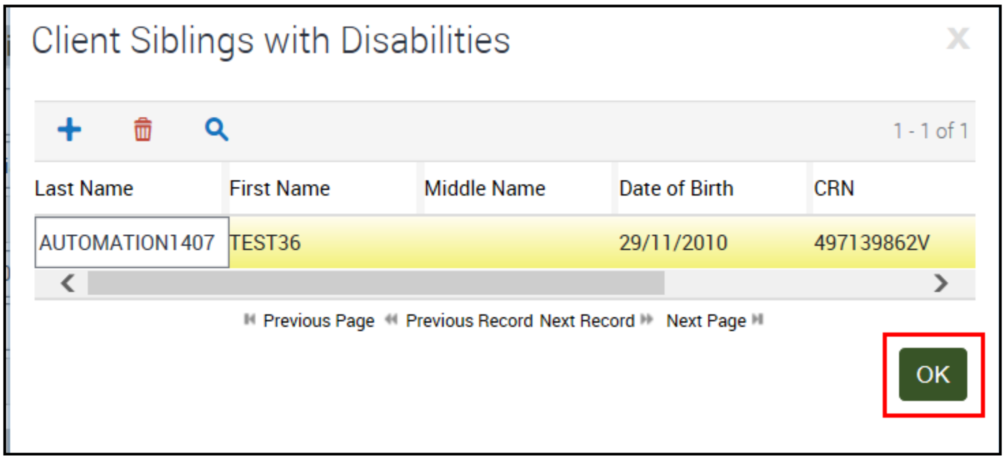
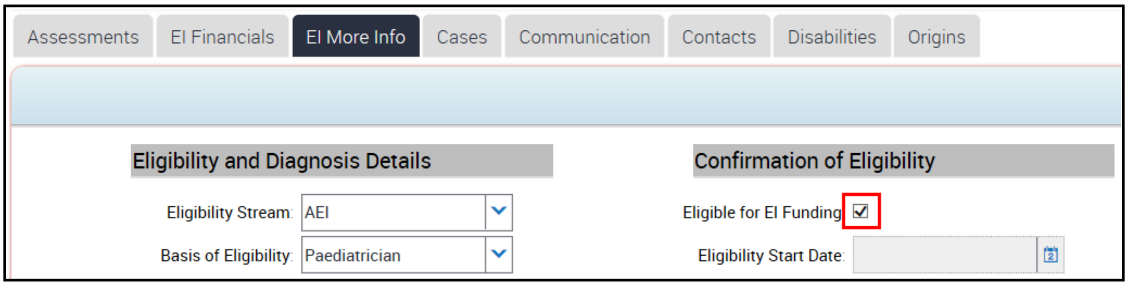


</td></tr>
</table>

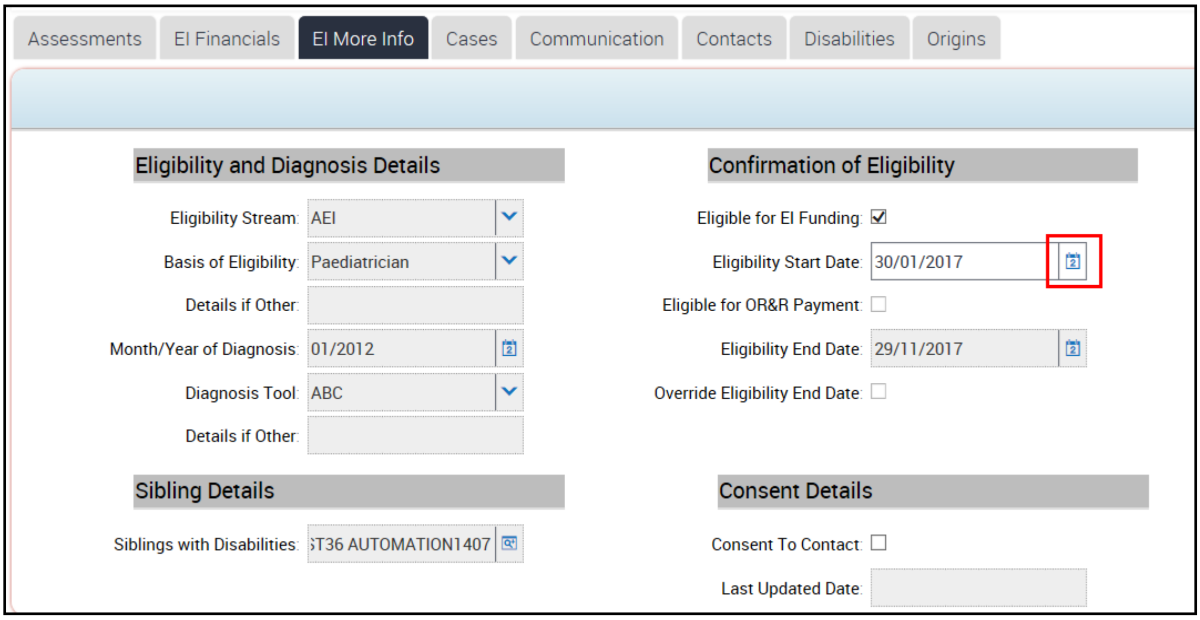
EI More Info View Tab

<table>
<tr><th>Steps</th><th>Actions</th></tr>
<tr><td>1</td><td>Navigate to the EI More Info view tab.

</td></tr>
<tr><td>2</td><td>Click the dropdown box and select Eligibility Stream, Basis of Eligibility and Diagnosis Tool.

</td></tr>
<tr><td>3</td><td>Important Note: Diagnostic Tool is not required for Better Start.</td></tr>
</table>

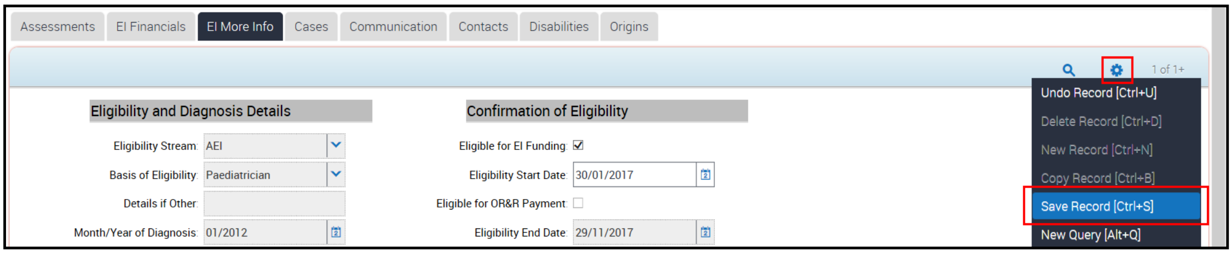
Steps	Actions
4	Click the glyph to next to **Month/Year Diagnosis** to open the calendar. Select the **Month** and **Year.** Click **Done**. 
5	Click the glyph next to **Siblings with Disabilities** (only if applicable). The Client Siblings with Disabilities window will open for information about the client's siblings. 
6	Click the + (New) icon. 

Steps	Actions
7	Enter information into all relevant fields then click the (Save) icon. 
8	Click **OK**. 
9	Click on the box next to **Eligible for EI Funding** – a tick will appear automatically to confirm the client’s eligibility. 

<table>
<tr><th>Steps</th><th>Actions</th></tr>
<tr><td>10</td><td>
Update the Eligibility Start Date field (if applicable) by clicking the glyph.



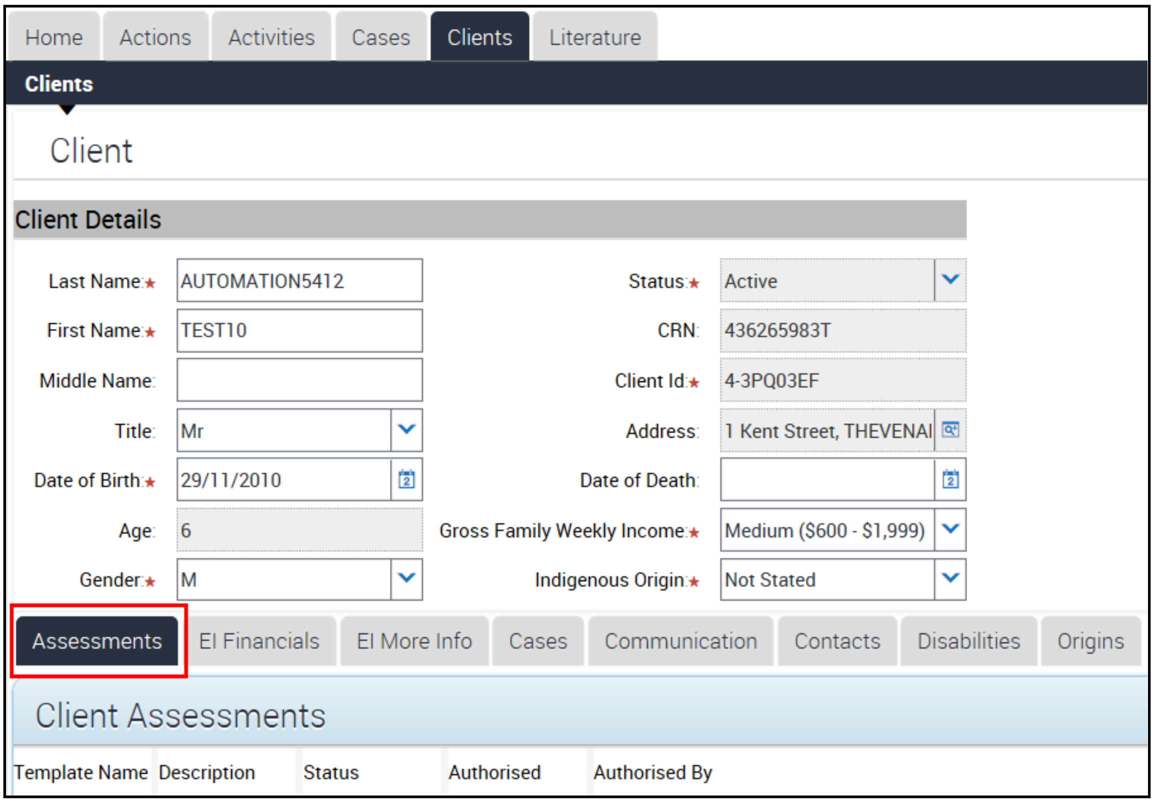
Important Note: The Eligibility start date is usually the date that the client is deemed eligible by an Autism Advisor or the Better Start Registration and Information Service and is registered in GPS.
</td></tr>
<tr><td>11</td><td>
Save the record by clicking into the (Menu) icon and selecting Save Record.

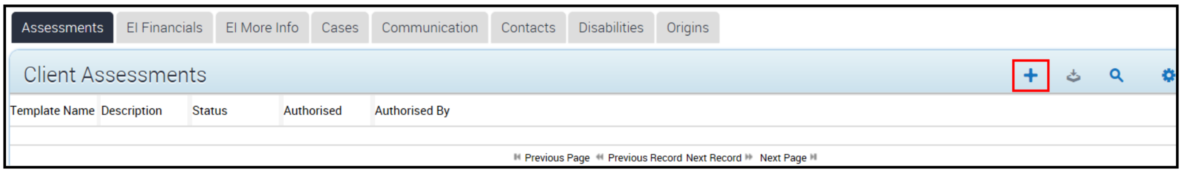


</td></tr>
</table>

Assessments View Tab

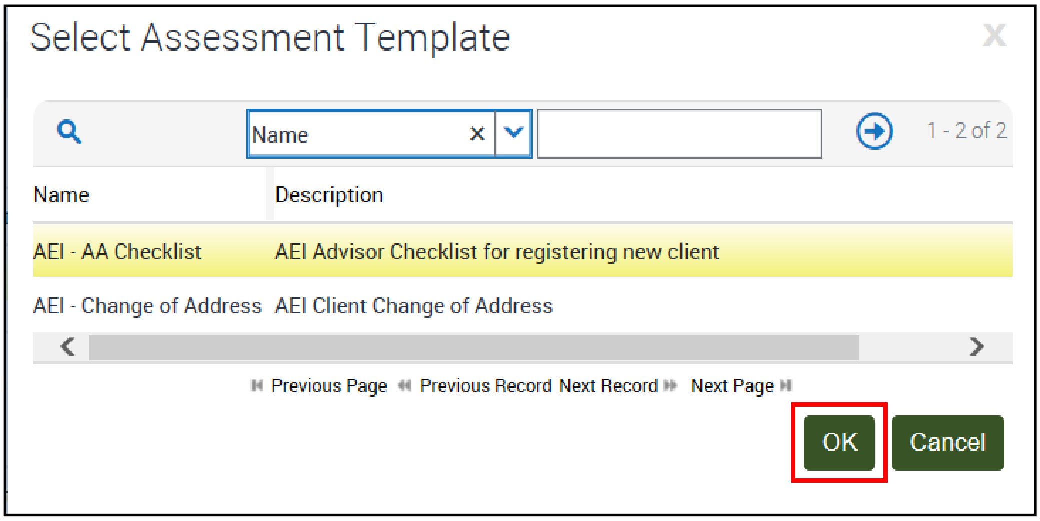
<table>
<tr><th>Steps</th><th>Actions</th></tr>
<tr><td>1</td><td>Navigate to the Assessments view tab.


</td></tr>
<tr><td>2</td><td>Click the + (New) icon.

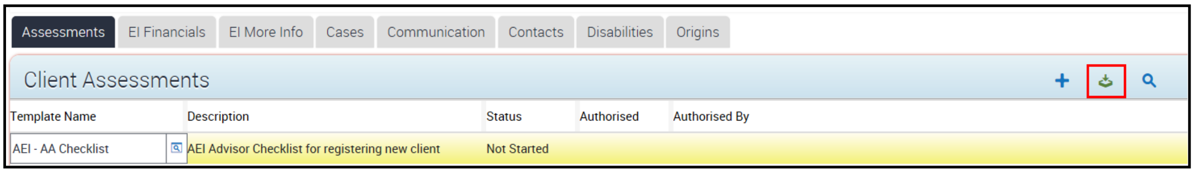

</td></tr>
<tr><td>3</td><td>Click the glyph next to Template Name.


</td></tr>
</table>

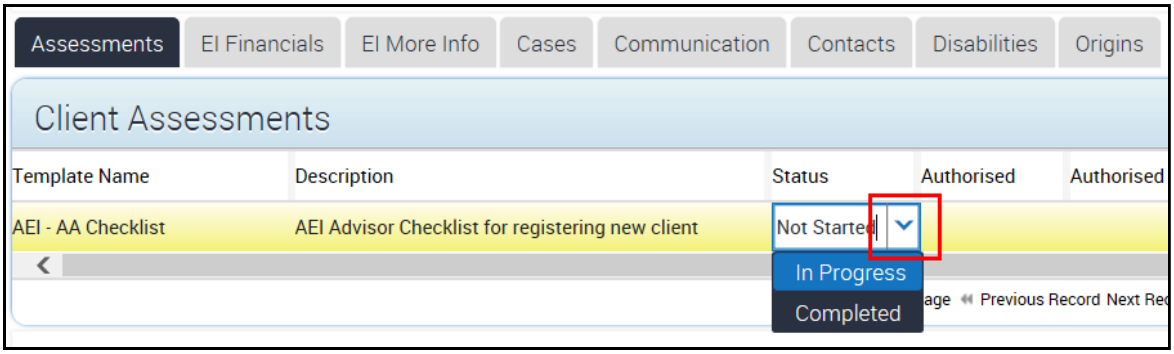
<table>
<tr><th>Steps</th><th>Actions</th></tr>
<tr><td>4</td><td>Highlight the relevant Checklist Template for registering a new client then click OK. The relevant Template will then appear in the Description field.



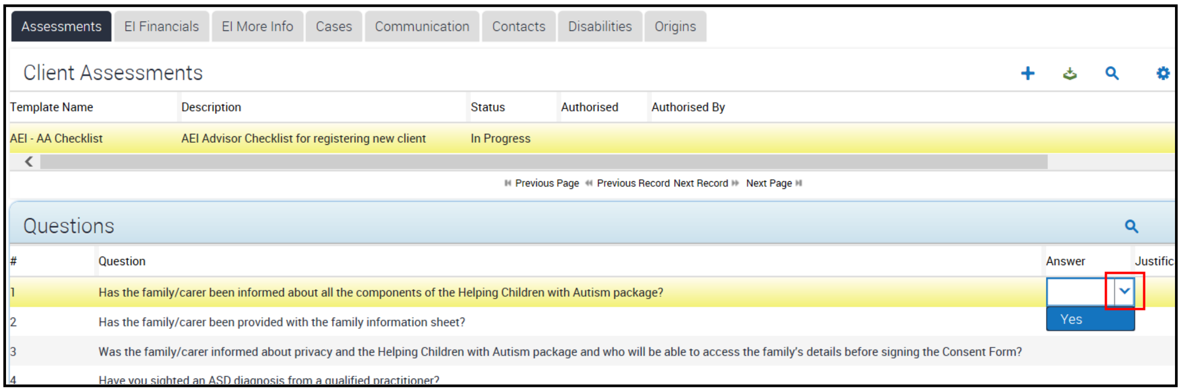
</td></tr>
<tr><td>5</td><td>Save the record by clicking the (Save) icon.



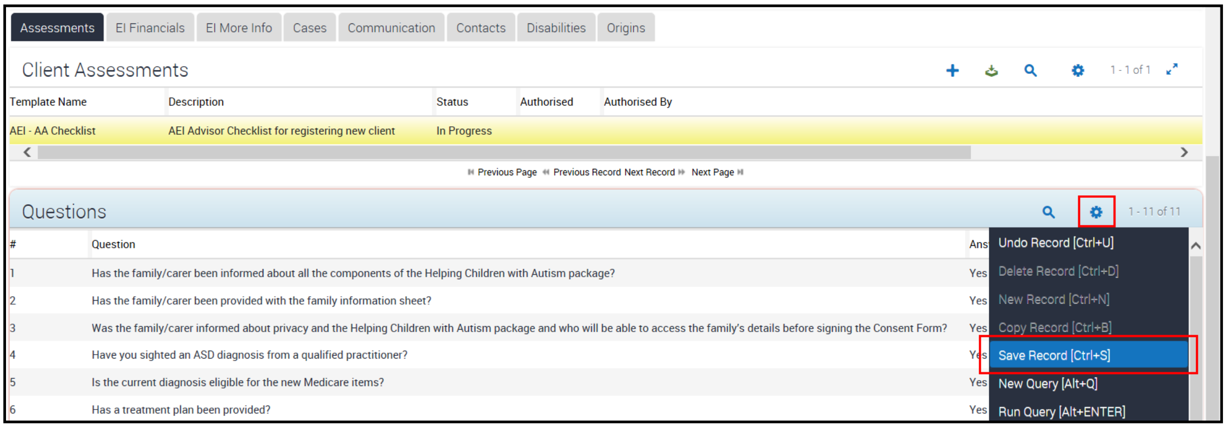
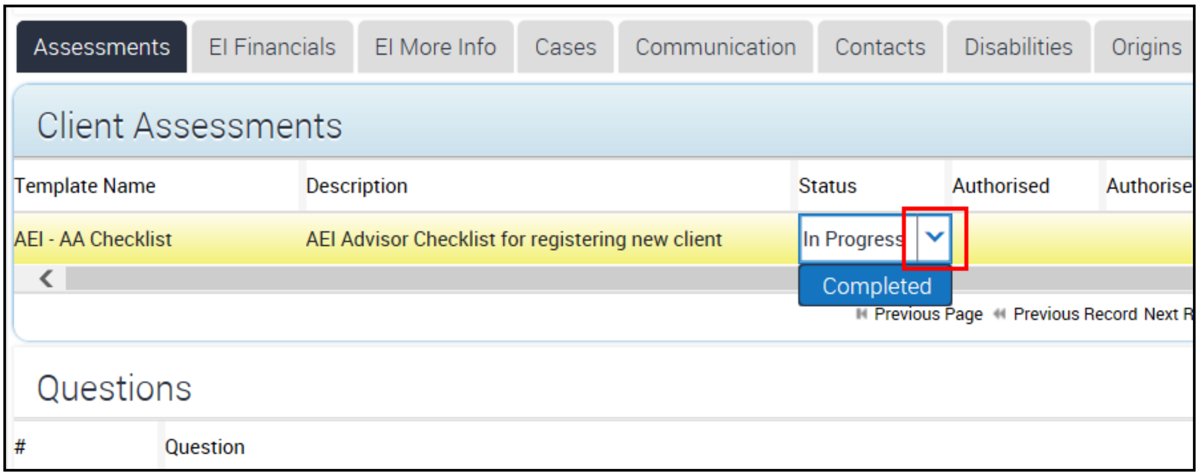
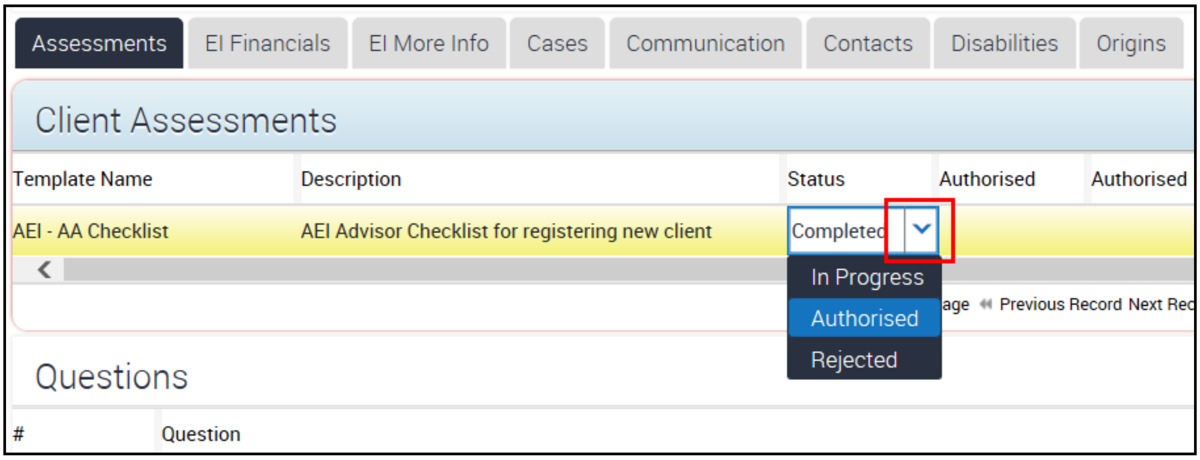
</td></tr>
<tr><td>6</td><td>Click the Status dropdown box and select In Progress.

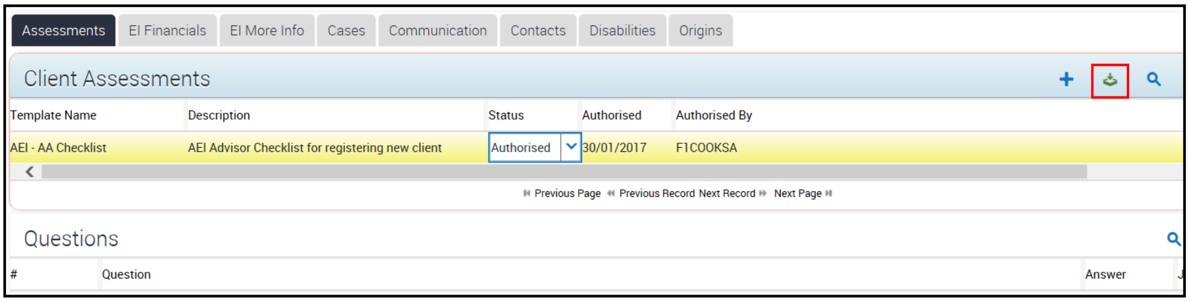


</td></tr>
<tr><td>7</td><td>Click the dropdown box next to each item under Answer.
All questions must be answered before saving the record.



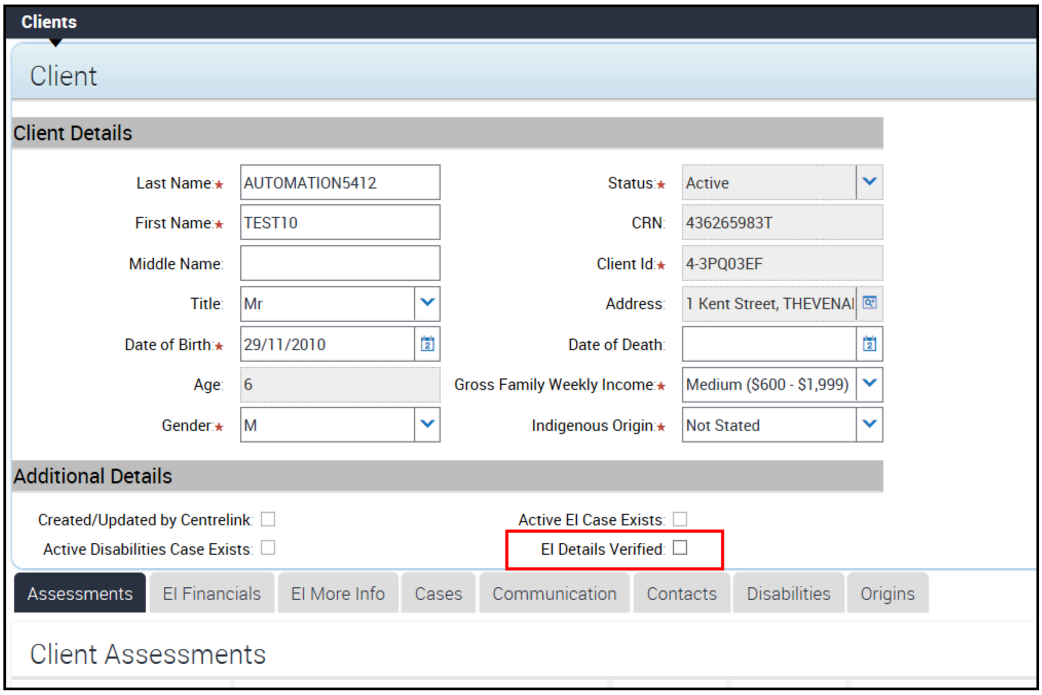
</td></tr>
</table>

Steps	Actions
8	Save the record by clicking the (Menu) icon and selecting **Save Record**. 
9	Click the **Status** drop down box and select **Completed** from the drop down list. 
10	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. 

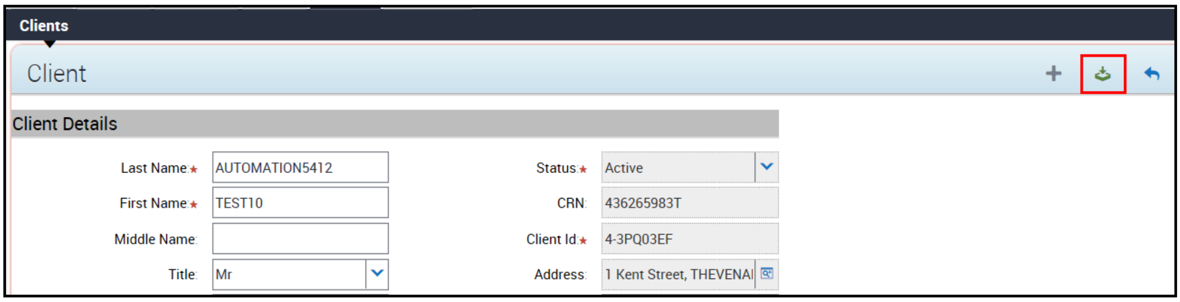
<table>
<tr><th>Steps</th><th>Actions</th></tr>
<tr><td>11</td><td>Save the record by clicking the (Save) icon.

</td></tr>
</table>

EI Details Verified

<table>
<tr><th>Steps</th><th>Actions</th></tr>
<tr><td>1</td><td>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.

</td></tr>
<tr><td>2</td><td>Then tick the EI Details Verified box.


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.</td></tr>
</table>

Steps	Actions
3	Save the record by clicking the (Save) icon. 
4	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] on 1800 020 283 or email GPS.Helpdesk@communitygrants.gov.au