



# Creating a New Client Record

## Disability Case Portal (DCP)

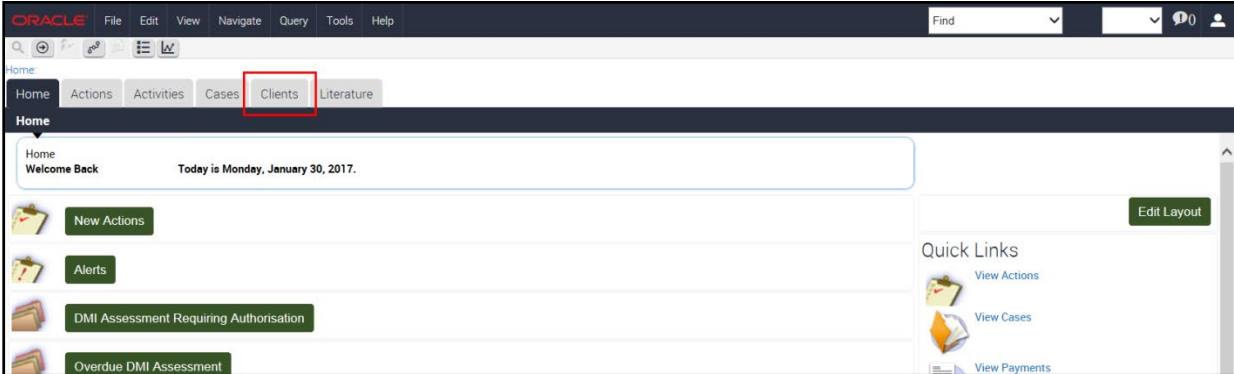

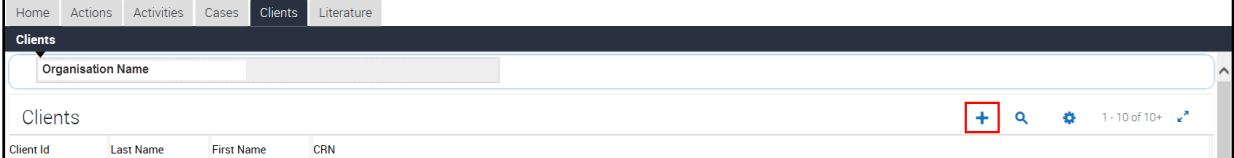
### Autism Advisor or Better Start Information and Registration Service

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.

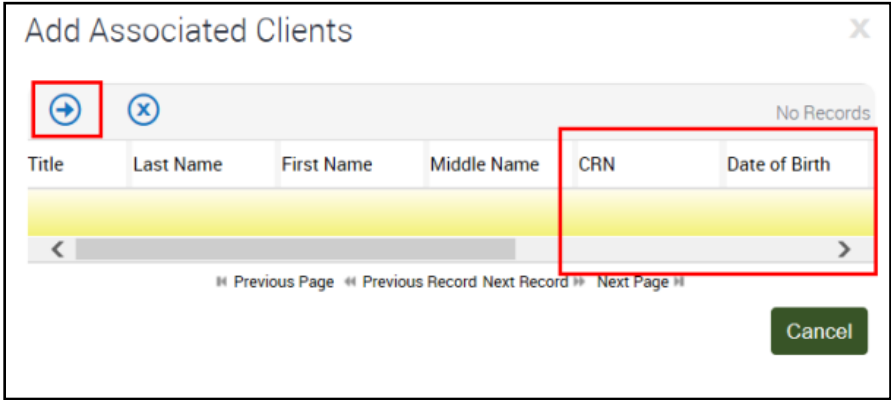
#### Portal Access:

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

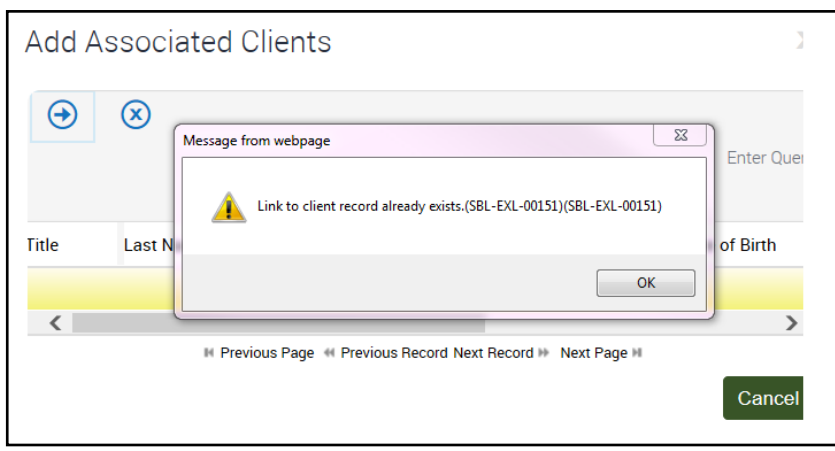
Steps	Actions
1	<p>Navigate to the <b>Clients</b> screen by clicking on the Clients tab.</p> 
2	<p>DCP displays a list of clients currently associated to your organisation.</p> <p>To create a new Client record, click the  (New) icon.</p> 


Steps	Actions
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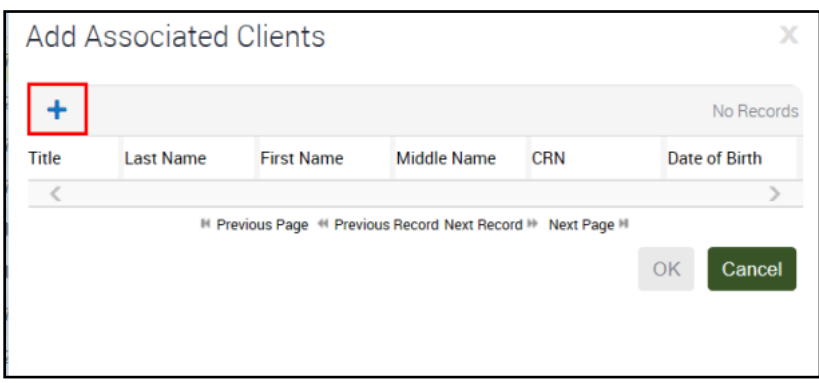
**3** Enter the Client's **Customer Reference Number (CRN)** and **Date of Birth** and then click the  (Go) icon.

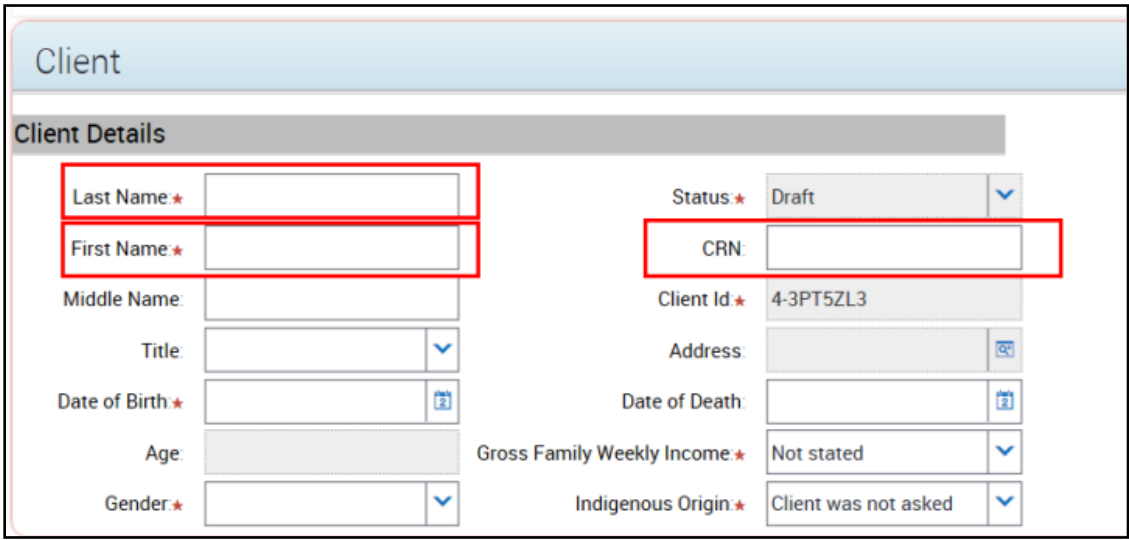


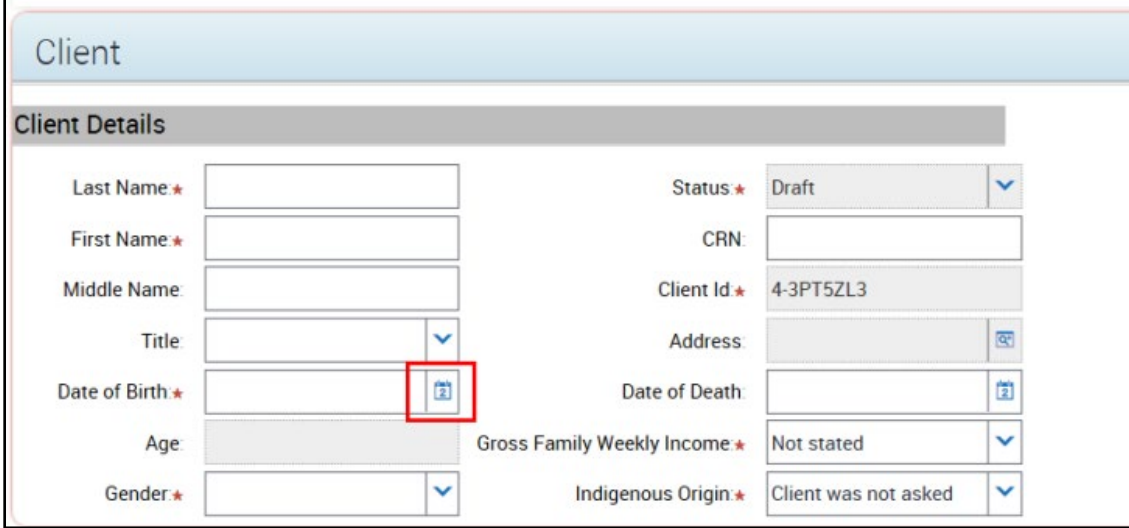
**Important Note:** If the following message appears, a record for this client already exists.

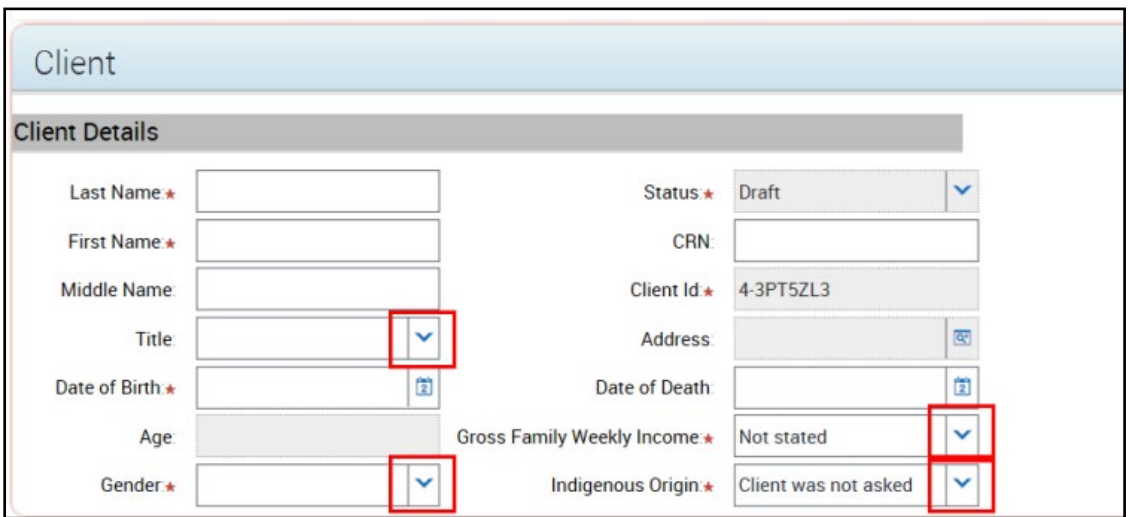


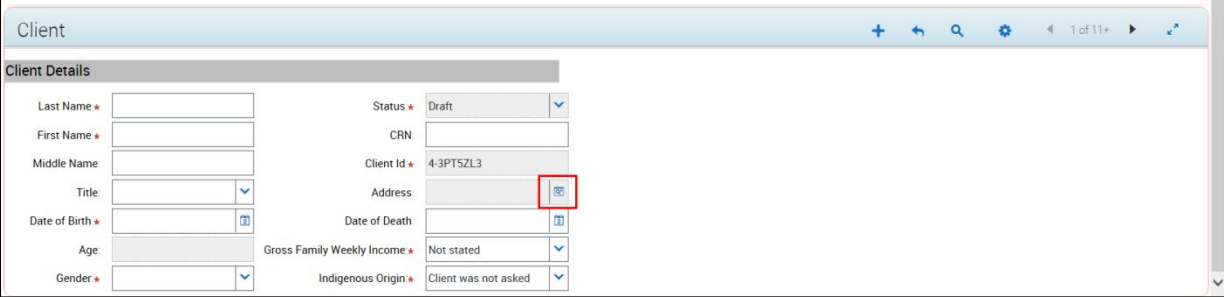
**4** If no record is displayed, select the  (New) icon to create a new Client record.

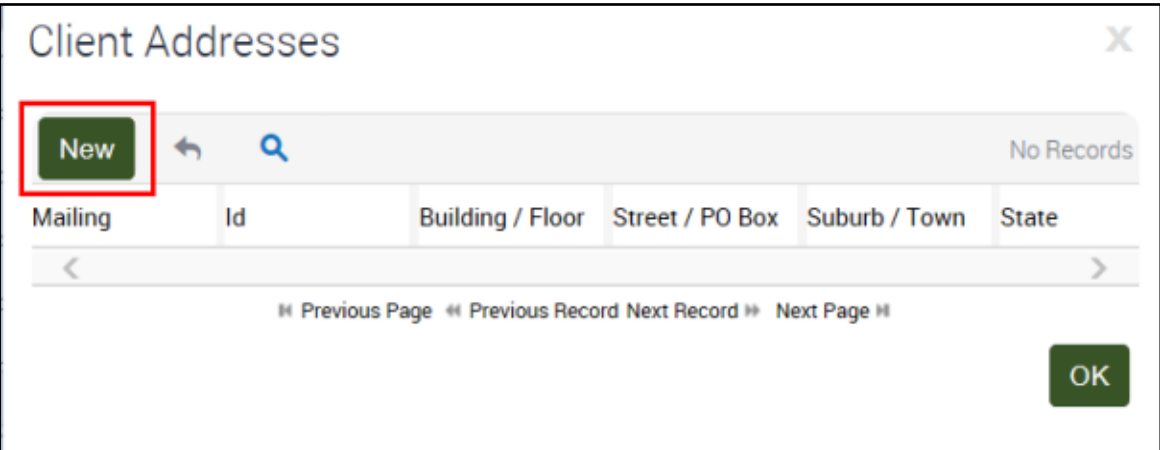



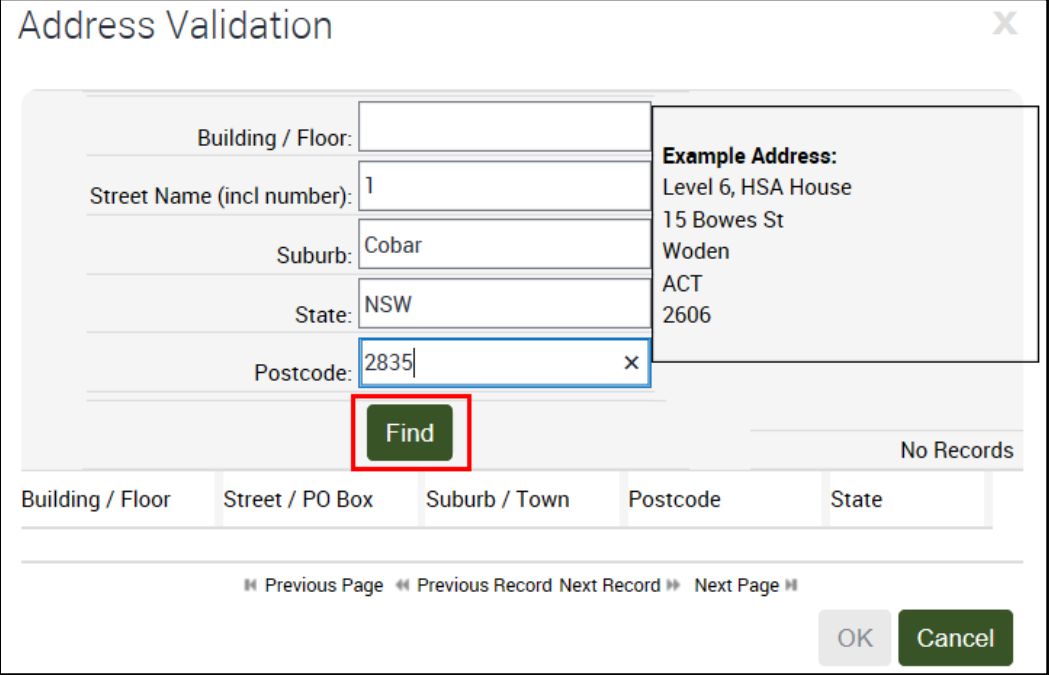
Steps	Actions
5	<p>Scroll down the screen to enter the client's <b>Last Name</b>, <b>First Name</b> and <b>CRN</b>.</p>  <p>The screenshot shows the 'Client Details' form. The 'Last Name', 'First Name', and 'CRN' input fields are highlighted with red rectangles. Other fields include 'Middle Name', 'Title', 'Date of Birth', 'Age', 'Gender', 'Status', 'Client Id', 'Address', 'Date of Death', 'Gross Family Weekly Income', and 'Indigenous Origin'.</p>

6	<p>Click the glyph and select the <b>Date of Birth</b>.</p>  <p>The screenshot shows the 'Client Details' form. The calendar icon (glyph) next to the 'Date of Birth' field is highlighted with a red rectangle.</p>
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7	<p>Click the drop-down boxes against <b>Title</b>, <b>Gender</b>, <b>Gross Family Weekly Income</b> and <b>Indigenous Origin</b> and select from the dropdown list for each.</p>  <p>The screenshot shows the 'Client Details' form. The drop-down arrows for the 'Title', 'Gender', 'Gross Family Weekly Income', and 'Indigenous Origin' fields are highlighted with red rectangles.</p>
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Steps	Actions
8	<p>Click the glyph next to <b>Address</b>. The Client Address window will open to insert the Client's residential address.</p> 

9	<p>Click <b>New</b>.</p>  <p> <b>Important Note:</b> 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.</p>
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10	<p>Enter the client's address into the address fields and click <b>Find</b>.</p> 
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Steps	Actions
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**11** 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

Building / Floor:

Street Name (incl number):

Suburb:

State:

Postcode:

**Find**

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

1 - 10 of 126

Building / Floor	Street / PO Box	Suburb / Town	Postcode	State
	Acacia Drive	COBAR	2835	NSW
	Airport Road	COBAR	2835	NSW
	Annies Lane	COBAR	2835	NSW
	Baldry Close	COBAR	2835	NSW
	Bannister Court	COBAR	2835	NSW
	Barrier Highway	COBAR	2835	NSW
	Barton Street	COBAR	2835	NSW
	Bathurst Street	COBAR	2835	NSW
	Becker Street	COBAR	2835	NSW
	Beersheba Court	COBAR	2835	NSW

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**OK** **Cancel**



**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).

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

Client Addresses

**New**  1 - 1 of 1


Street / PO Box	Suburb / Town	State	Postcode	Country	Type
Acacia Drive	COBAR	NSW	2835	Australia	Residential

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Status: **Draft**

**Steps**      **Actions**

13      Click **OK**.

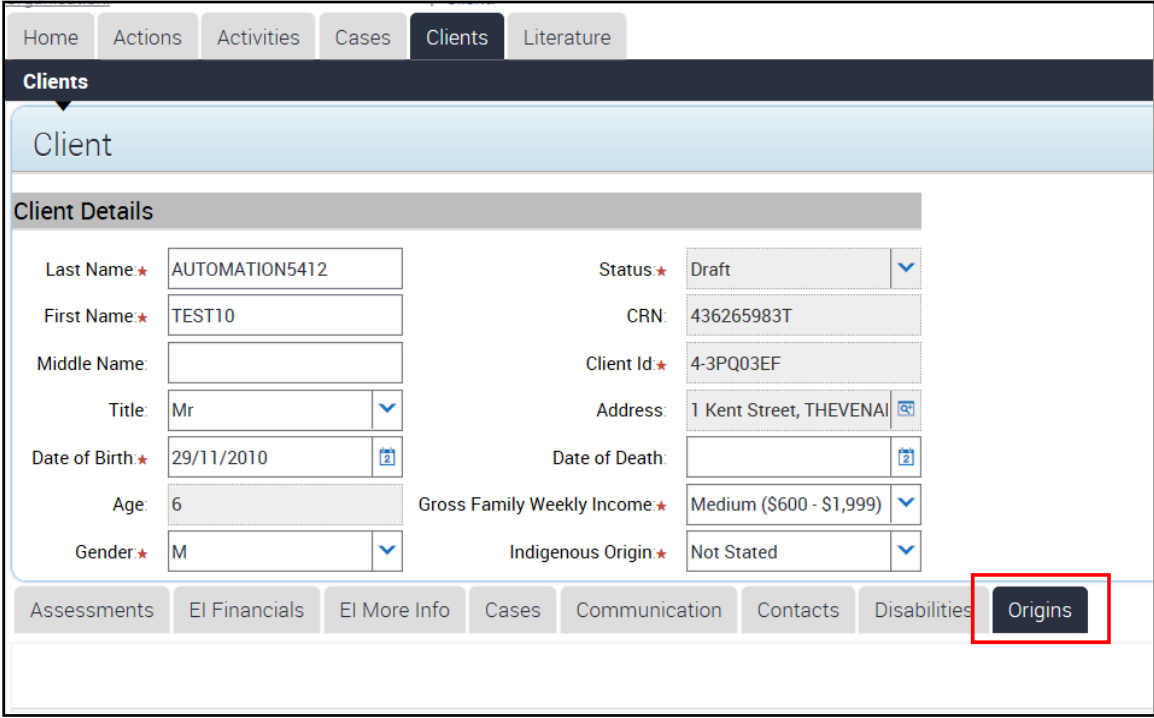
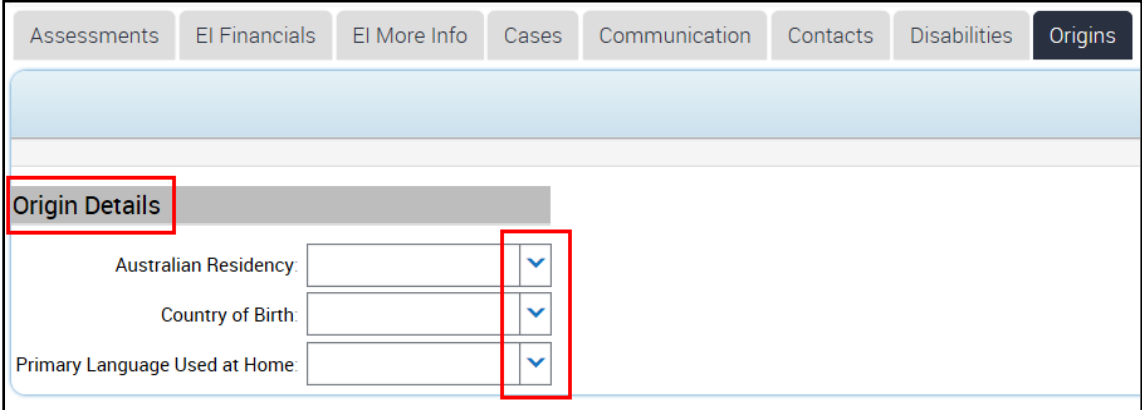

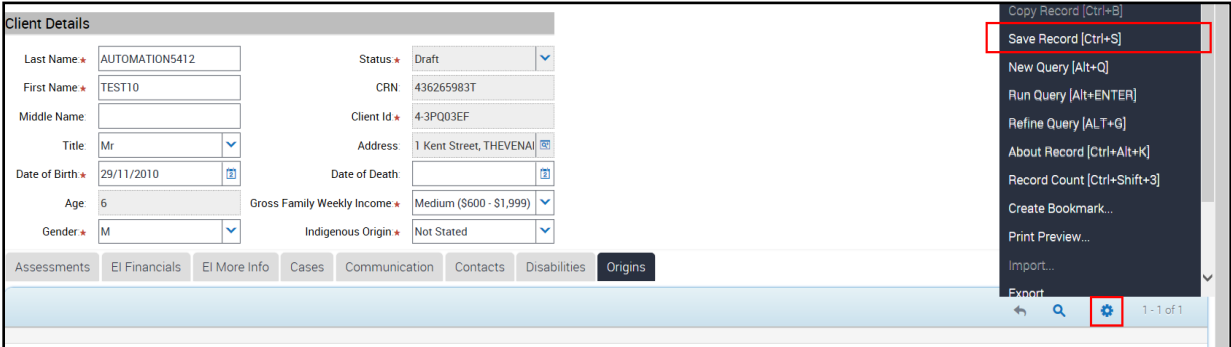
14      To save the record select the  (Menu) icon and click **Save Record**.

15      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.

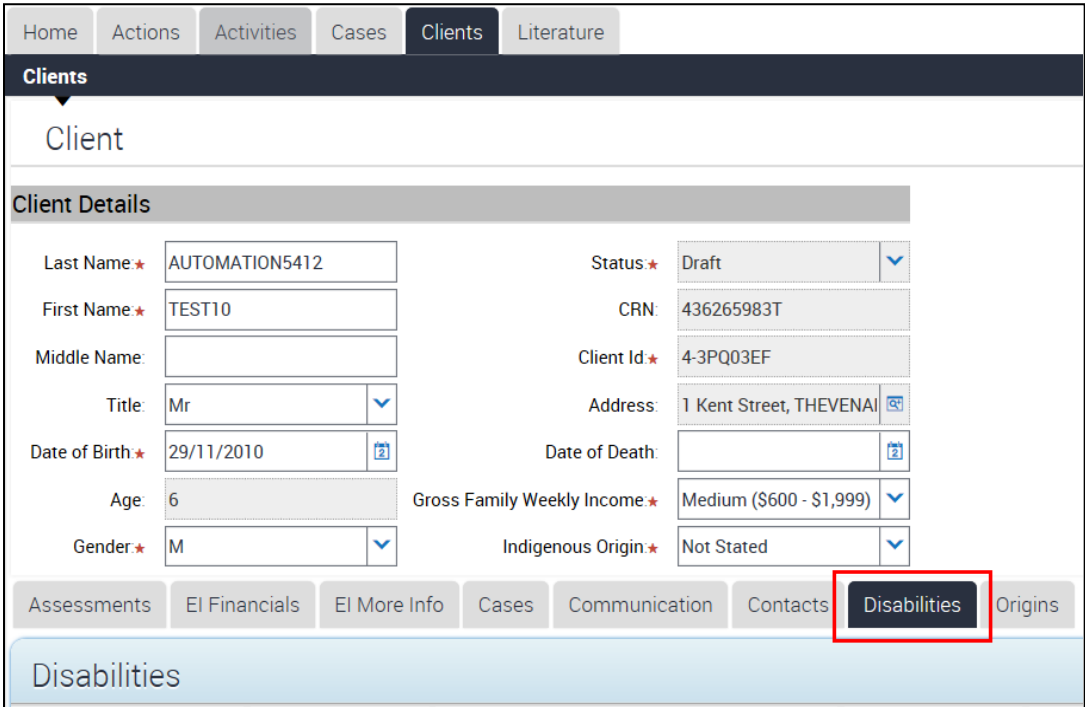


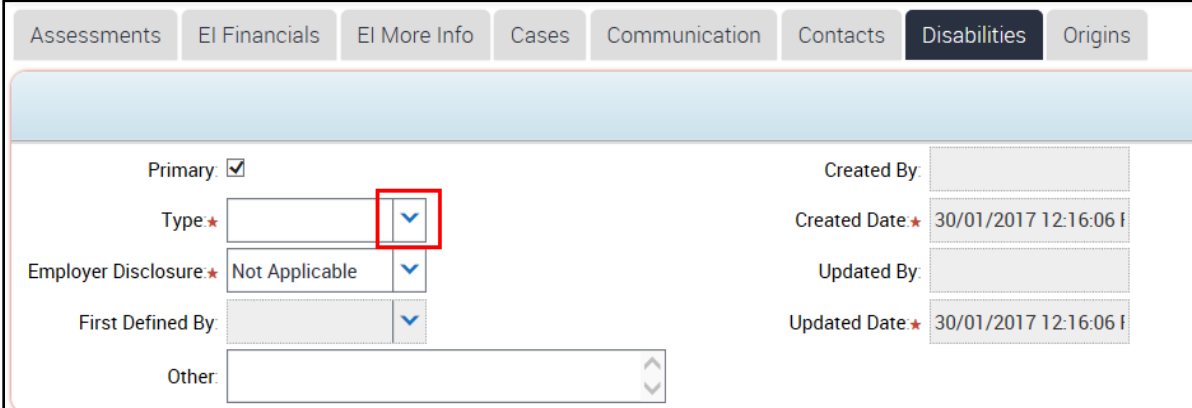



# Origins View Tab

Steps	Actions
1	<p>Navigate to the <b>Origins</b> view tab.</p>  <p>The screenshot shows the 'Client' form with various fields. At the bottom, a navigation bar contains tabs for 'Assessments', 'EI Financials', 'EI More Info', 'Cases', 'Communication', 'Contacts', 'Disabilities', and 'Origins'. The 'Origins' tab is highlighted with a red rectangular box.</p>
2	<p>Scroll down to complete the Client's Origin Details. Click each dropdown box and select the appropriate option.</p>  <p>The screenshot shows the 'Origin Details' section of the form. Three dropdown menus are highlighted with red rectangular boxes: 'Australian Residency', 'Country of Birth', and 'Primary Language Used at Home'.</p>
3	<p>Save the record by selecting the  (Menu) icon and clicking <b>Save Record</b>.</p>  <p>The screenshot shows the 'Client Details' form. At the bottom right, a dropdown menu is open, and the 'Save Record [Ctrl+S]' option is highlighted with a red rectangular box. The 'Menu' icon (a gear) is also highlighted with a red rectangular box at the bottom of the form.</p>



# Disabilities View Tab

Steps	Actions
1	<p>Navigate to the <b>Disabilities</b> view tab.</p>  <p>The screenshot shows the 'Client Details' form for a client named 'AUTOMATION5412'. The 'Disabilities' tab is highlighted in a red box. The form includes fields for Last Name, First Name, Middle Name, Title, Date of Birth, Age, Gender, Status, CRN, Client Id, Address, Date of Death, Gross Family Weekly Income, and Indigenous Origin. Below the form is a navigation bar with tabs for Assessments, EI Financials, EI More Info, Cases, Communication, Contacts, Disabilities, and Origins.</p>
2	<p>Click the  (New) icon.</p>  <p>The screenshot shows the 'Disabilities' list view. The 'Disabilities' tab is highlighted in a red box. The list view includes a table with columns for Primary, Type, Other, First Defined By, Created By, Created Date, Employer Disclosure, and Updated Date. A red box highlights the '+' icon in the top right corner of the list view.</p>
3	<p>Click the dropdown box and select the appropriate disability from the list. This should be the child's confirmed diagnosis e.g. Down syndrome.</p> <p>For Better Start clients, select only N/A from Subtype drop-down list.</p>  <p>The screenshot shows the 'Disability' form. The 'Disabilities' tab is highlighted in a red box. The form includes fields for Primary, Type, Employer Disclosure, First Defined By, Other, Created By, Created Date, Updated By, and Updated Date. A red box highlights the 'Type' dropdown menu.</p> <p> <b>Important Note:</b> The Employer Disclosure field is not relevant to the Helping Children with Autism or Better Start Programs and defaults to 'Not Applicable'.</p>

4

Save the record by clicking the  (Save) icon.

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

Primary

Type \* Autism Spectrum I

Employer Disclosure \* Not Applicable

First Defined By




Other

Created By

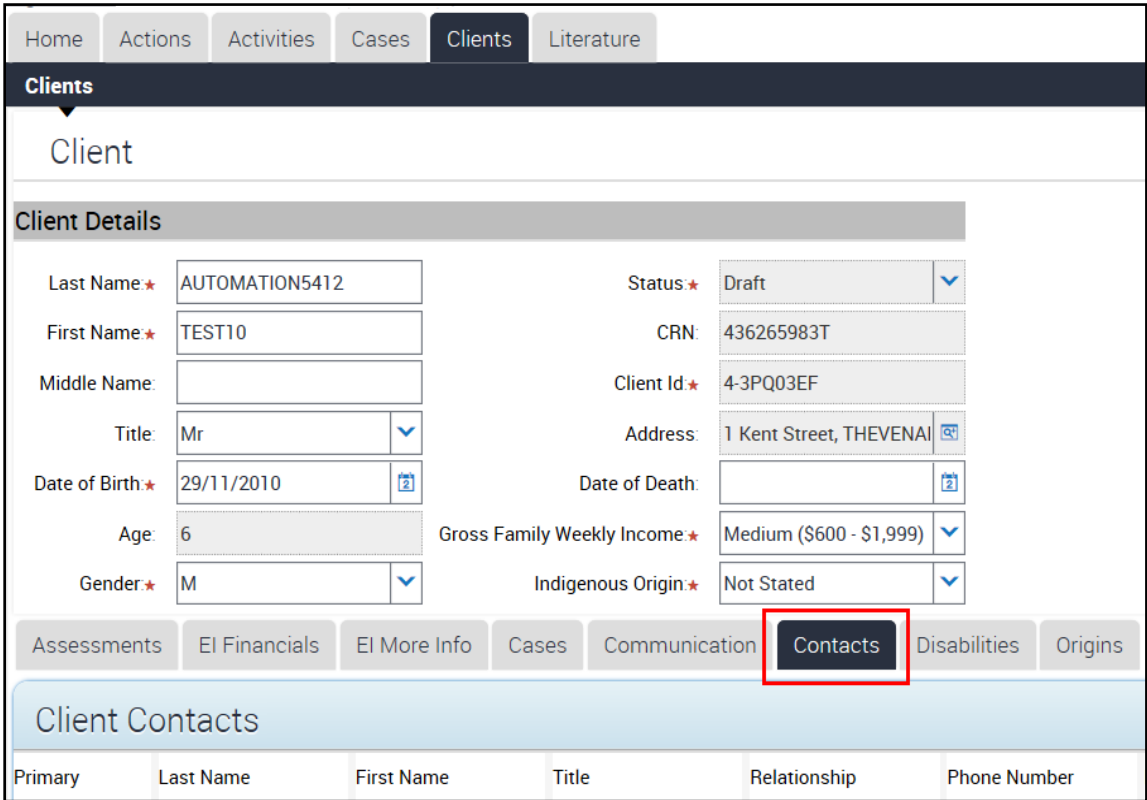


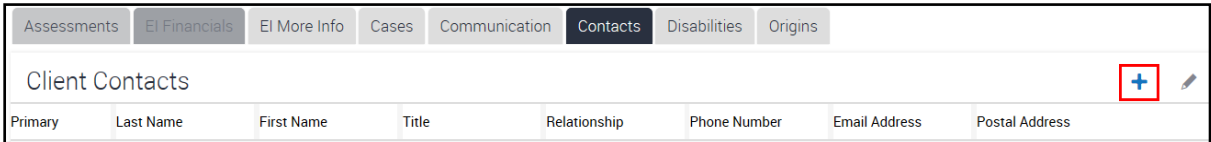
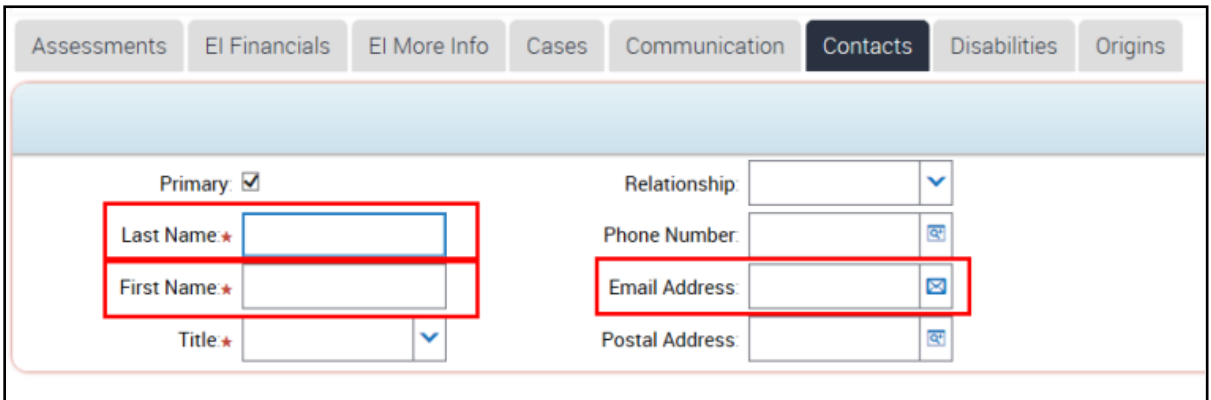
Created Date \* 30/01/2017 12:16:06 f

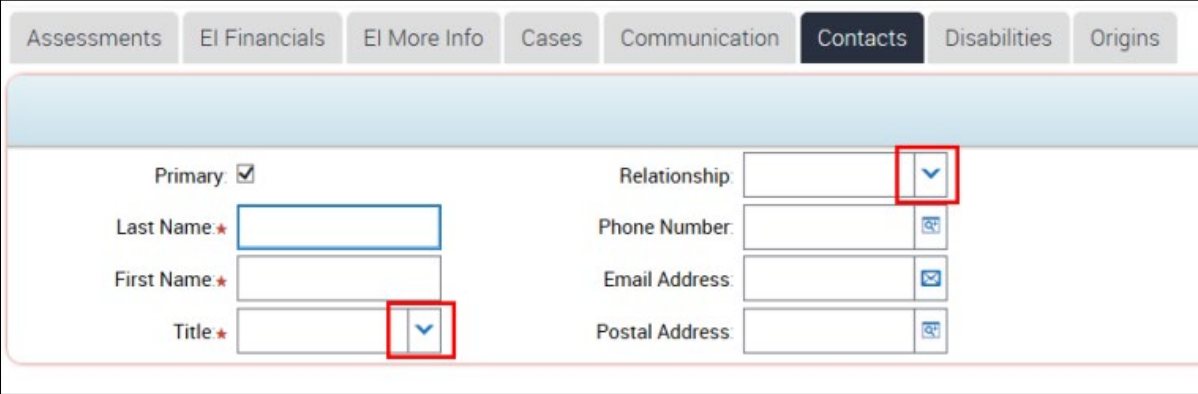
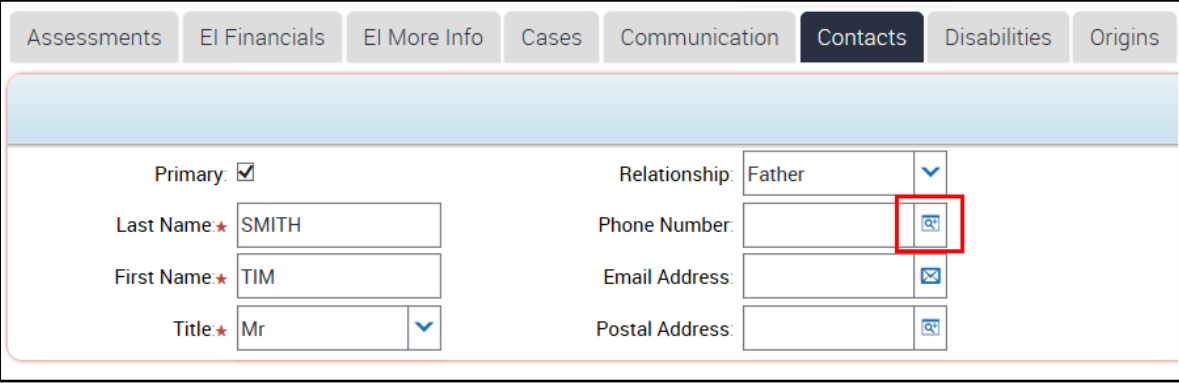

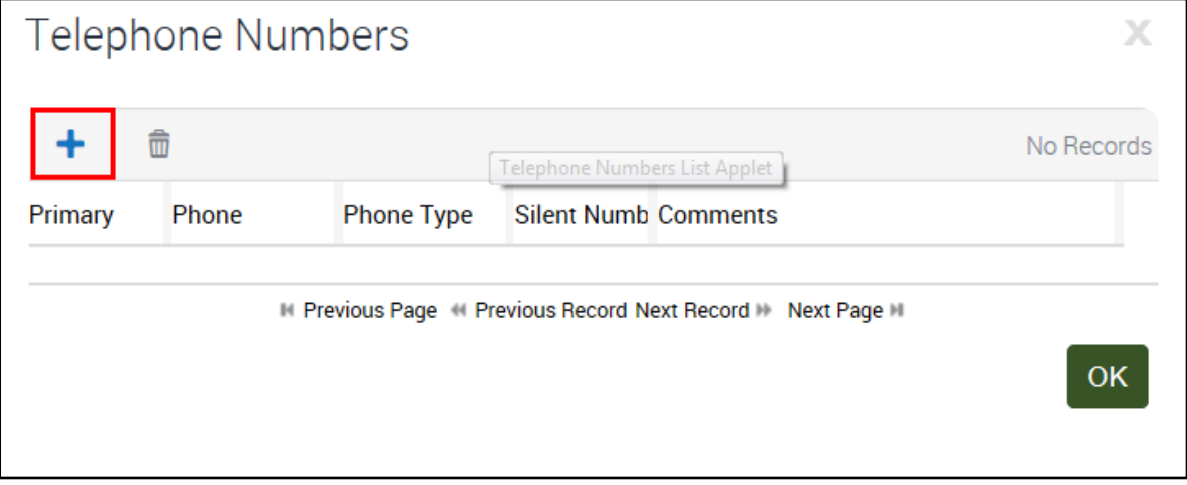
Updated By

Updated Date \* 30/01/2017 12:16:06 f


  

# Contacts View Tab

Steps	Actions
1	<p>Navigate to the <b>Contacts</b> view tab to enter a primary contact for this client.</p> <div data-bbox="247 253 1399 1050"><p>The screenshot shows the 'Client Details' page for a client named 'AUTOMATION5412'. The 'Contacts' tab is highlighted with a red box. Below the client details, there is a 'Client Contacts' table with columns for Primary, Last Name, First Name, Title, Relationship, and Phone Number.</p></div>
	<p> <b>Important Note:</b> 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.</p> <p>These details are emailed or mailed to the primary contact.</p> <p>Please ensure that a valid email or postal address is recorded for the primary contact of each client.</p>
2	<p>Click the  (New) icon.</p> <div data-bbox="247 1438 1463 1579"><p>The screenshot shows the 'Client Contacts' table with a '+' icon in the top right corner, which is highlighted with a red box.</p></div>
3	<p>Enter the contact's <b>Last name</b>, <b>First Name</b> and <b>Email</b> in the fields shown below.</p> <div data-bbox="247 1662 1463 2060"><p>The screenshot shows the contact form with the 'Last Name', 'First Name', and 'Email Address' fields highlighted with red boxes.</p></div>

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

Steps	Actions
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7 Enter all relevant fields then click the  (Save) icon.

Telephone Numbers X



Primary:

Phone:★ 02 1234 5678

Phone Type:★ Home X ▾

Silent Number

Comments:


8 Click **OK**.

Telephone Numbers X

1 - 1 of 1

Primary	Phone	Phone Type	Silent Number	Comments
<input checked="" type="checkbox"/>	02 1234 5678	Home		

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Next Page »



9 Click the glyph next to **Postal Address**. The Contact Addresses window will open to insert the Contact's postal address.

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


Primary:


Last Name★ SMITH


First Name★ TIM

Title★ Mr ▾

Relationship: Father ▾

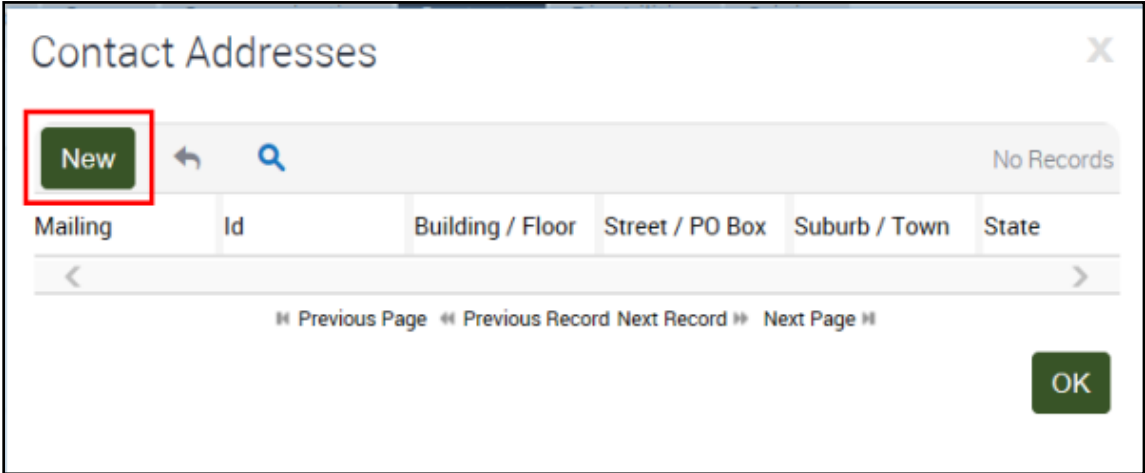
Phone Number: 02 1234 5678 

Email Address:  

Postal Address:  

Steps	Actions
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**10** Click **New**.



Contact Addresses

New

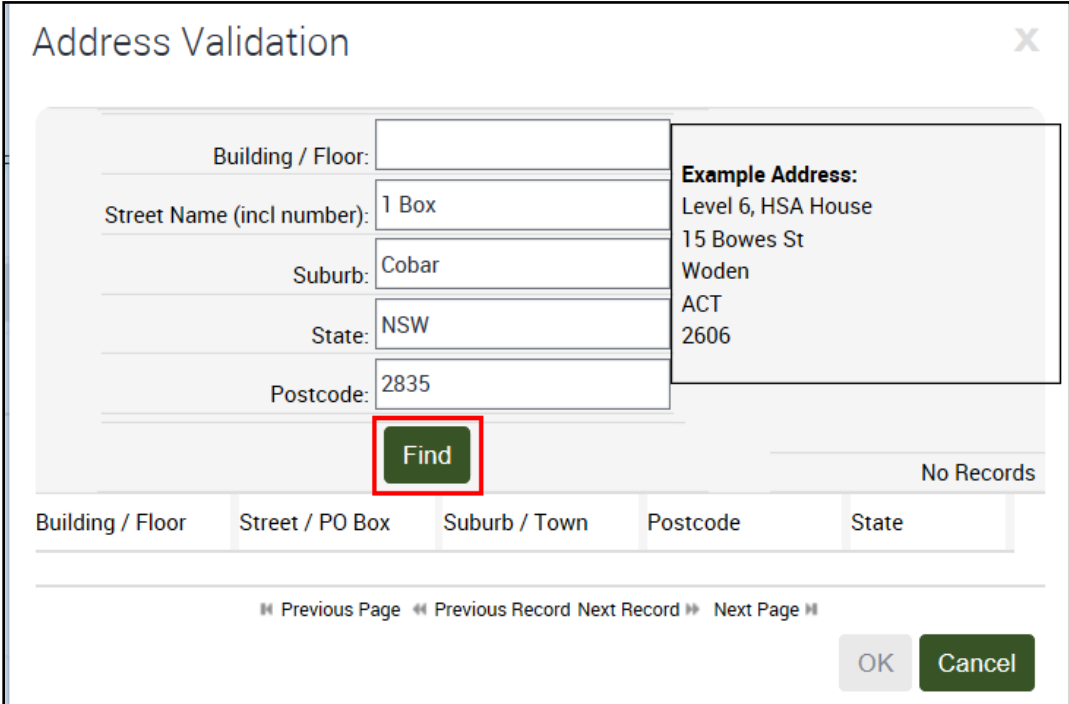
No Records

Mailing	Id	Building / Floor	Street / PO Box	Suburb / Town	State
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Previous Page Previous Record Next Record Next Page

OK

**11** Enter the contact's postal address and click **Find**.  
A list of valid addresses will be displayed.



Address Validation

Building / Floor:

Street Name (incl number):

Suburb:

State:

Postcode:

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

No Records

Building / Floor	Street / PO Box	Suburb / Town	Postcode	State
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OK Cancel

Steps	Actions
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**12** 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**

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
	1 Box Place	COBAR	2835	NSW

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**OK** **Cancel**

**13** Click the drop-down box and select the **Type**.

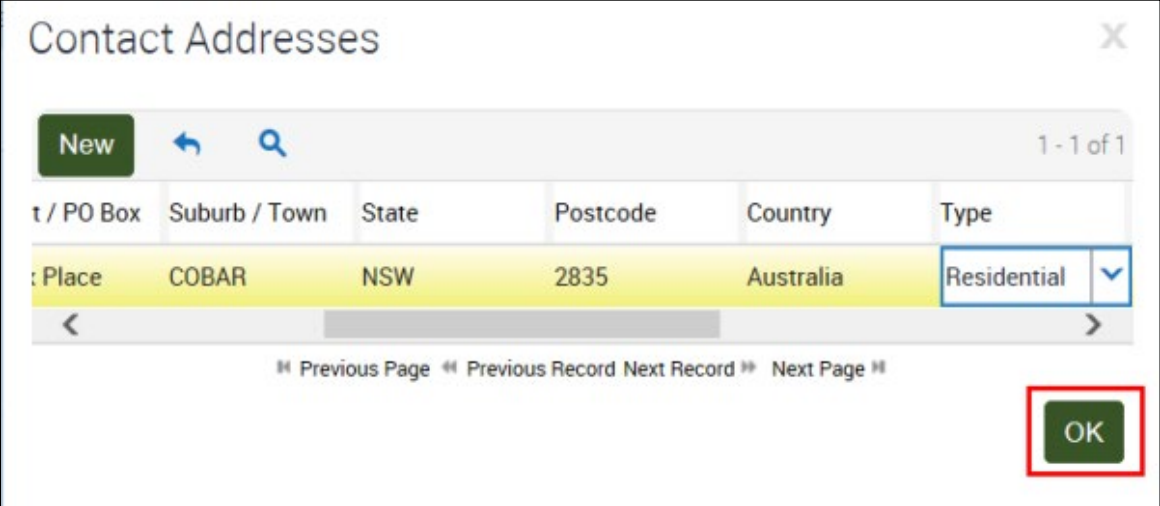
**Contact Addresses**


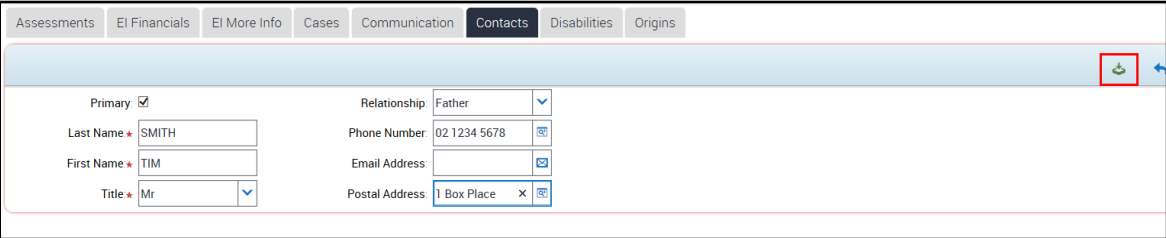
**New**    1 - 1 of 1

Street / PO Box	Suburb / Town	State	Postcode	Country	Type
1 Box Place	COBAR	NSW	2835	Australia	<input type="text"/> <ul style="list-style-type: none"> <li>Postal</li> <li>Residential</li> <li>Work</li> </ul>

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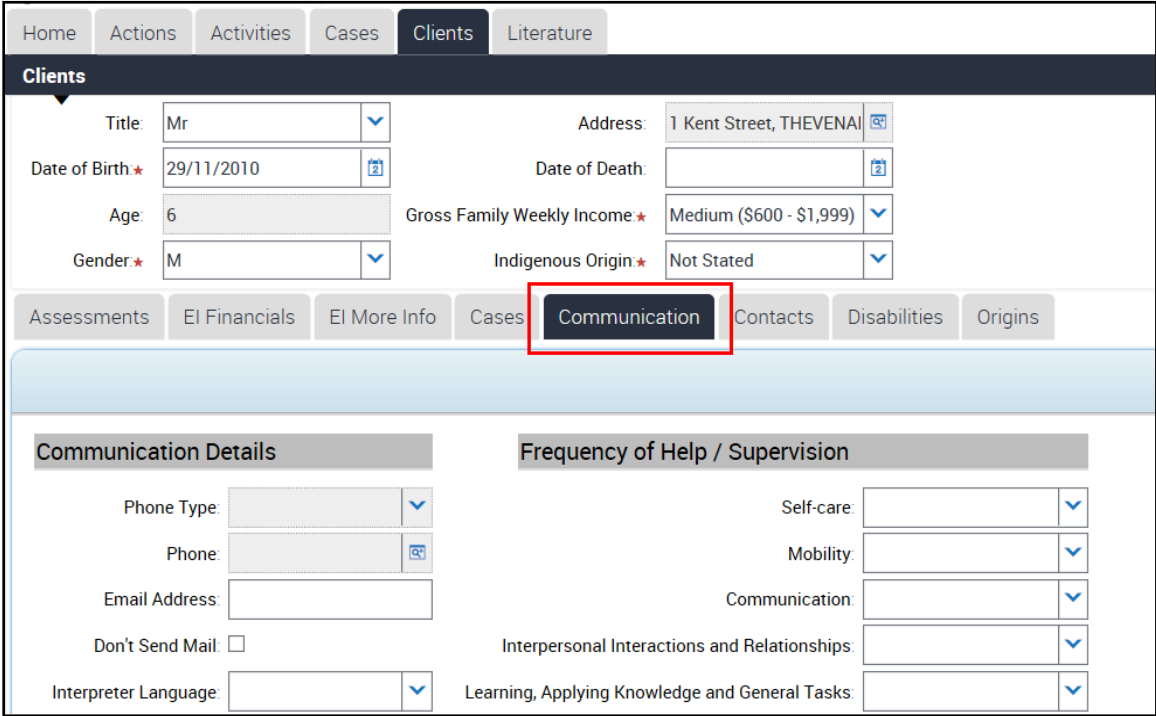
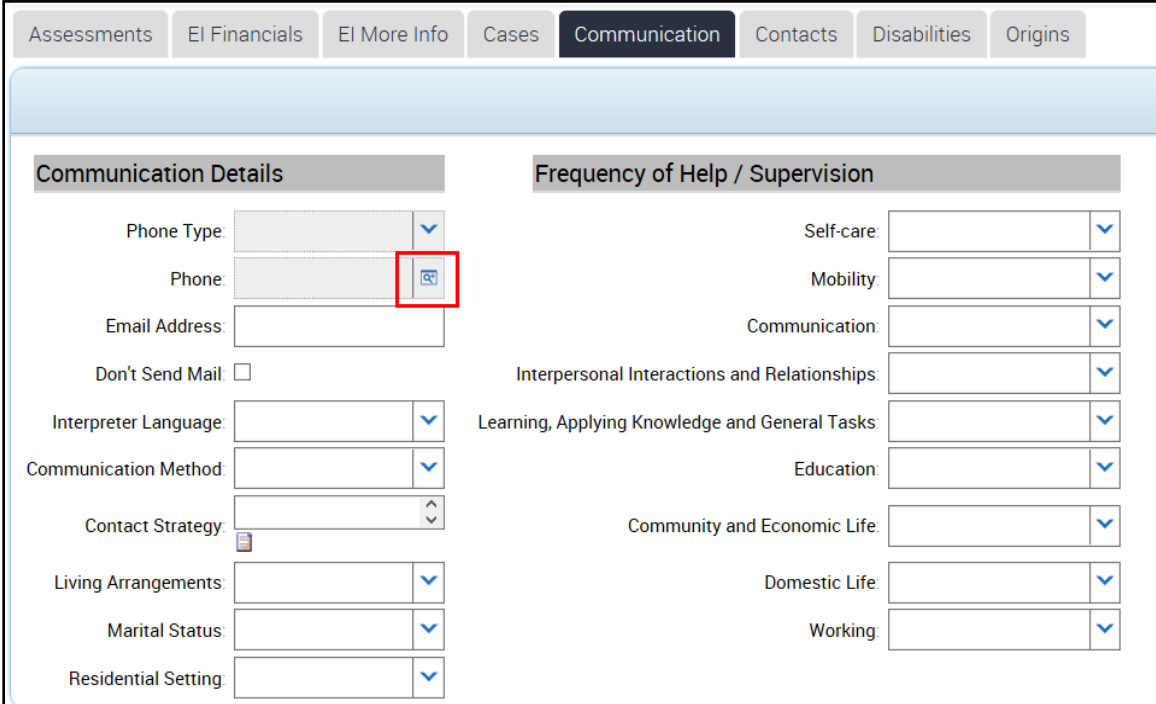
Steps	Actions
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<p><b>14</b></p>	<p>Click <b>OK</b>.</p> 
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<p><b>15</b></p>	<p>Save the contact record by clicking the  (Save) icon.</p> 
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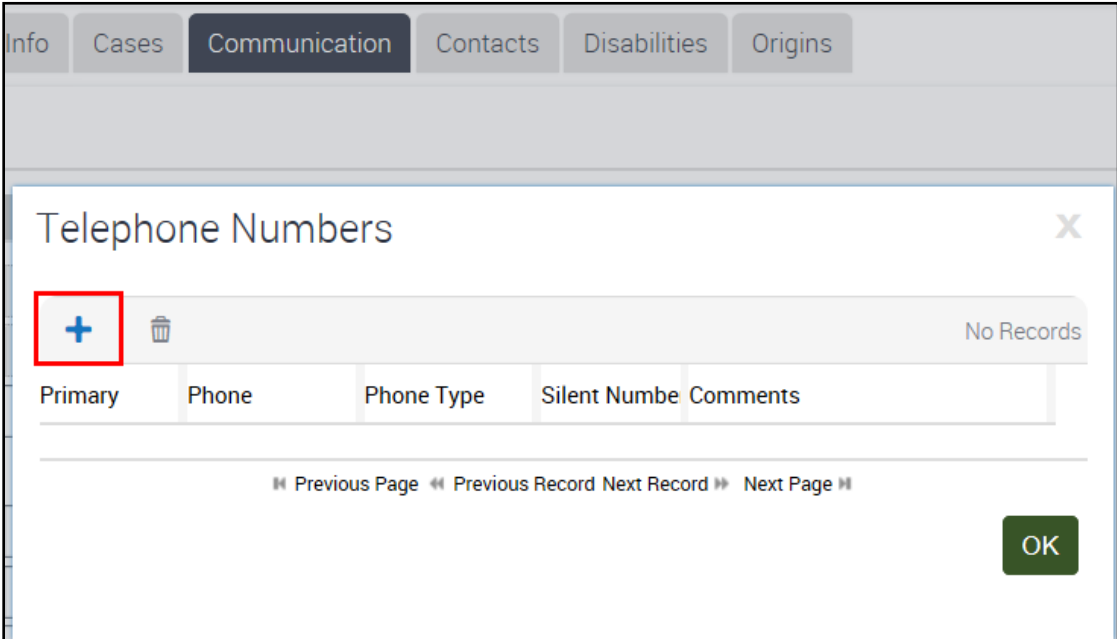



# Communication View Tab

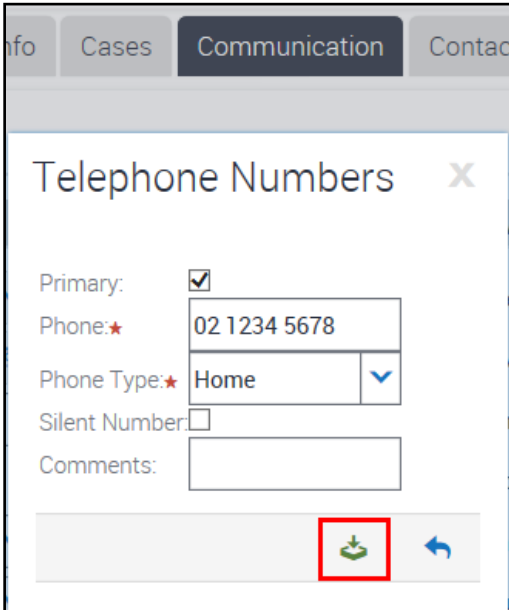
Steps	Actions
1	<p>Navigate to the <b>Communication</b> view tab.</p>  <p>The screenshot shows the 'Clients' page with a navigation bar at the top containing 'Home', 'Actions', 'Activities', 'Cases', 'Clients', and 'Literature'. Below the navigation bar is a 'Clients' header. The main content area contains a form with fields for 'Title' (Mr), 'Address' (1 Kent Street, THEVENAI), 'Date of Birth' (29/11/2010), 'Date of Death', 'Age' (6), 'Gross Family Weekly Income' (Medium (\$600 - \$1,999)), 'Gender' (M), and 'Indigenous Origin' (Not Stated). Below the form is a secondary navigation bar with tabs: 'Assessments', 'EI Financials', 'EI More Info', 'Cases', 'Communication' (highlighted with a red box), 'Contacts', 'Disabilities', and 'Origins'. The 'Communication' tab is active, showing two sections: 'Communication Details' and 'Frequency of Help / Supervision'. The 'Communication Details' section includes fields for 'Phone Type', 'Phone' (with a red box around the telephone icon), 'Email Address', 'Don't Send Mail' (checkbox), and 'Interpreter Language'. The 'Frequency of Help / Supervision' section includes dropdown menus for 'Self-care', 'Mobility', 'Communication', 'Interpersonal Interactions and Relationships', and 'Learning, Applying Knowledge and General Tasks'.</p>
2	<p>Click the glyph next to <b>Phone Number</b>. The Telephone Numbers window will open to insert the client's phone number.</p>  <p>The screenshot shows the 'Communication' tab active. The 'Phone' field in the 'Communication Details' section is highlighted with a red box around the telephone icon, indicating the target for the next step.</p>

**Steps**      **Actions**

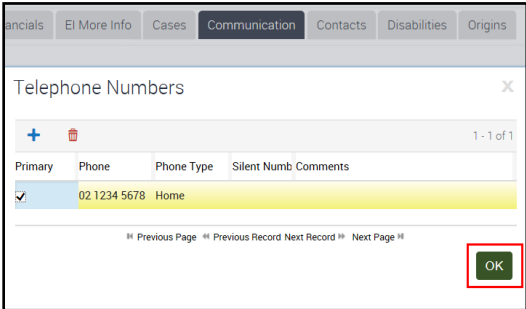
**3**      Click the  (New) icon.

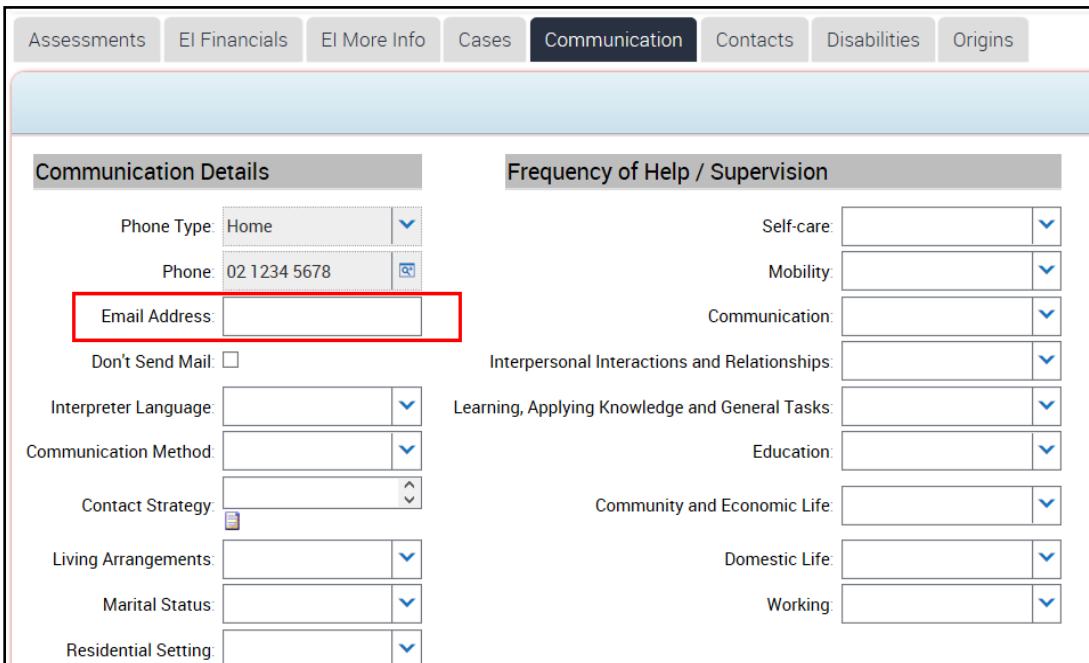


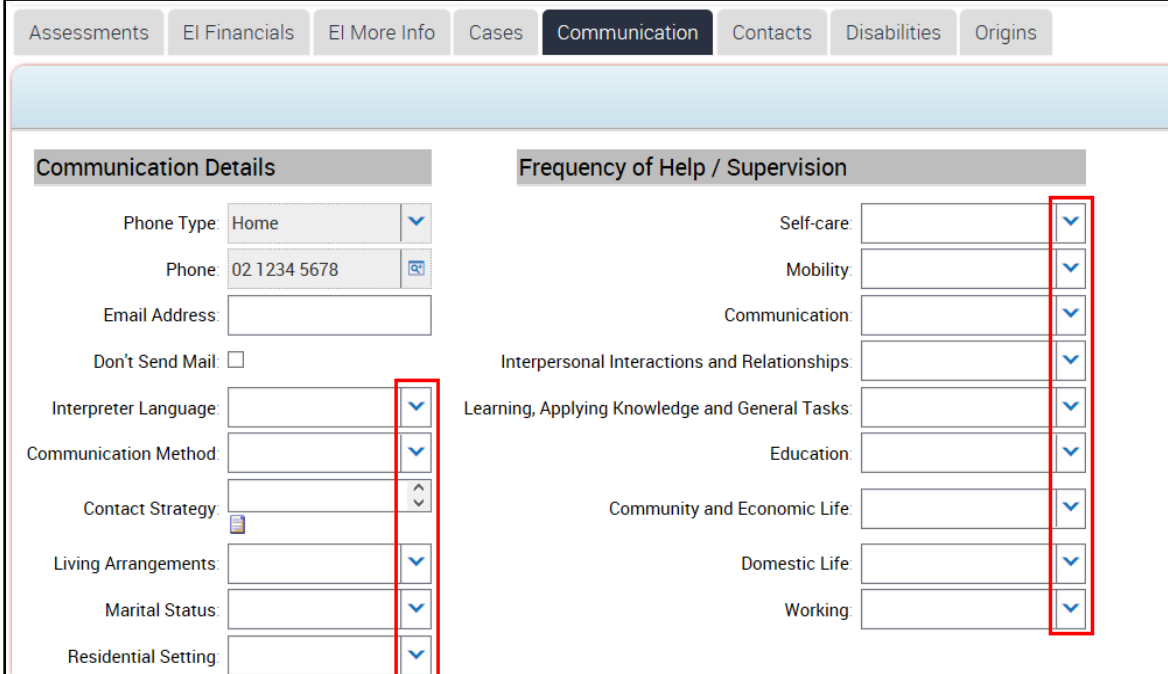
**4**      Enter all relevant fields then click the  (Save) icon.




**5**      Click **OK**.



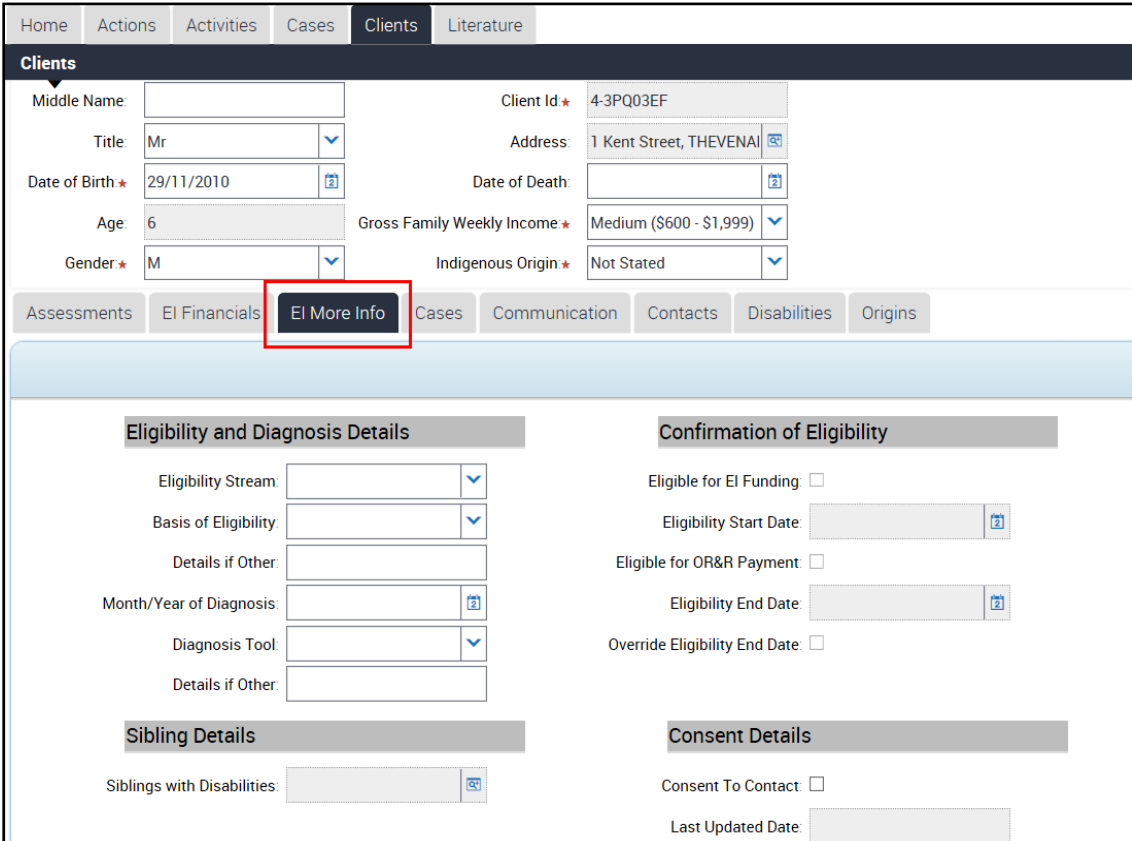
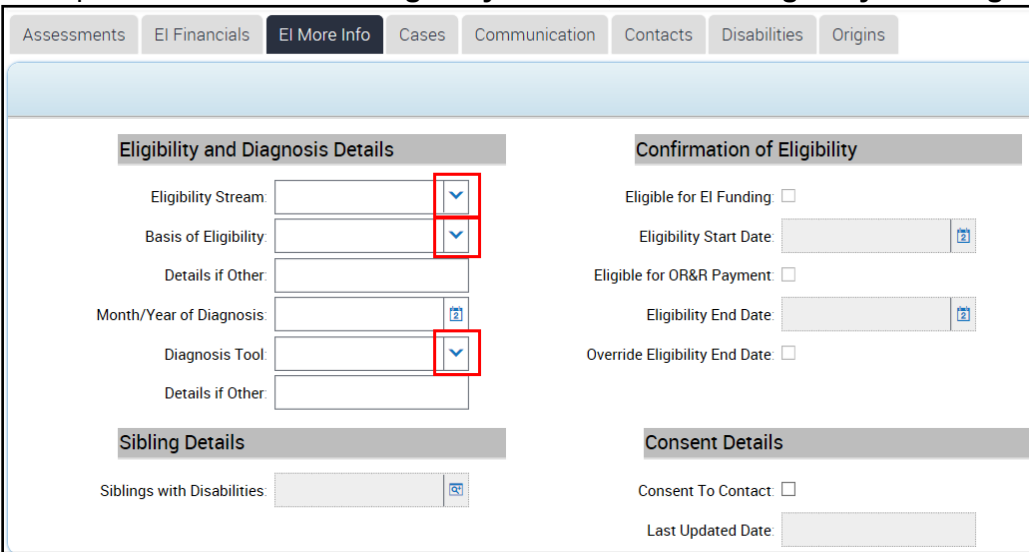

Steps	Actions
6	<p>Enter the <b>Email</b> address.</p> 

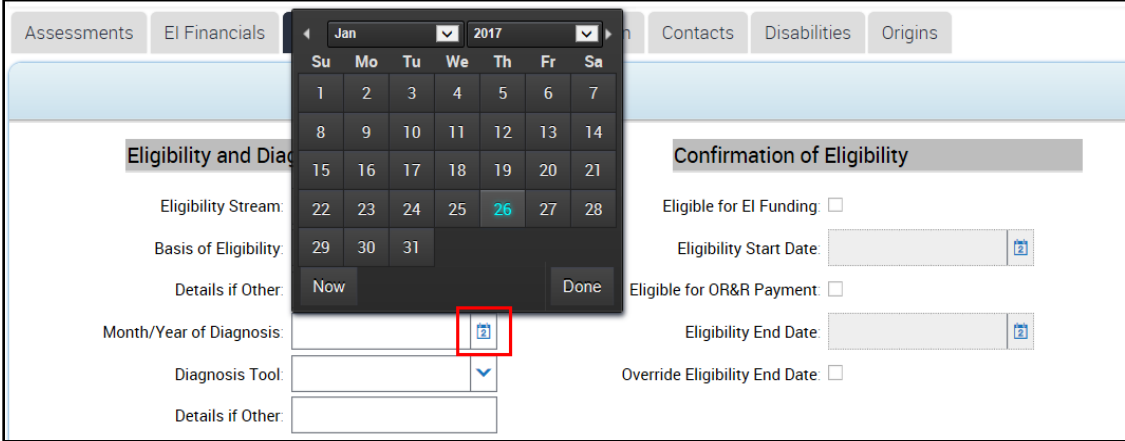


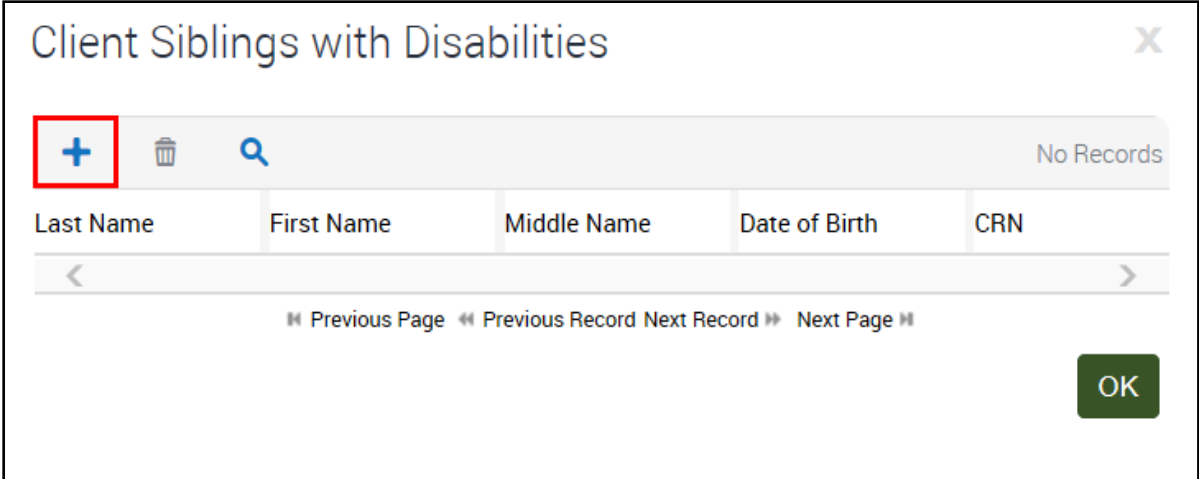
7	<p>The Communication tab contains details of the client’s living arrangements, communication method and interpreter information. Entering information in this view is optional.</p> <p>Enter information in relevant fields by clicking the arrow to the right of each item, which will show a dropdown list to select from.</p> 
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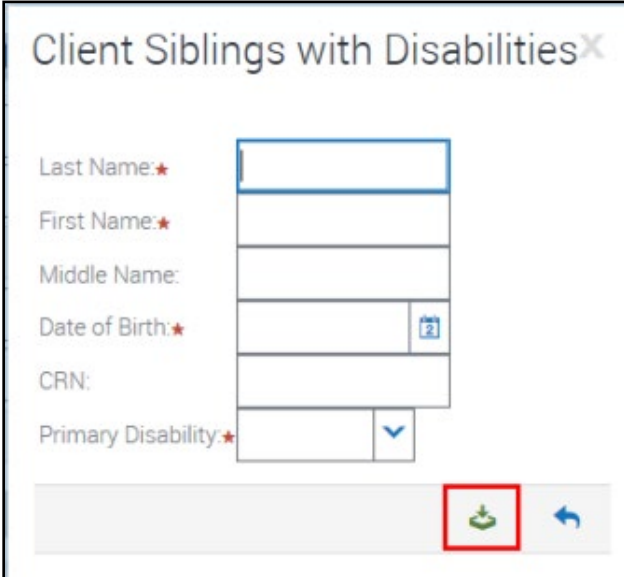
8	<p>Save the record by clicking <b>Save</b>.</p> 
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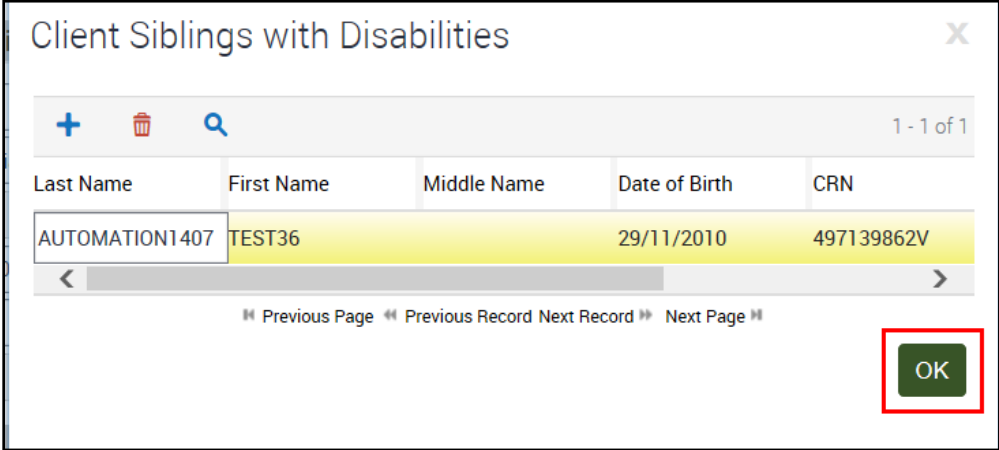


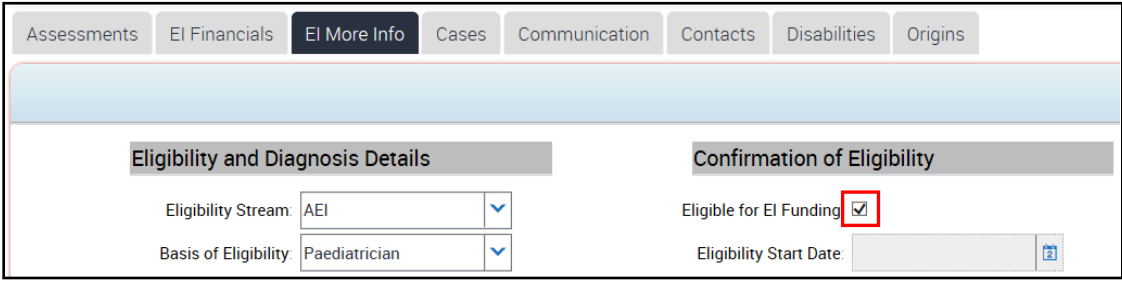
# EI More Info View Tab

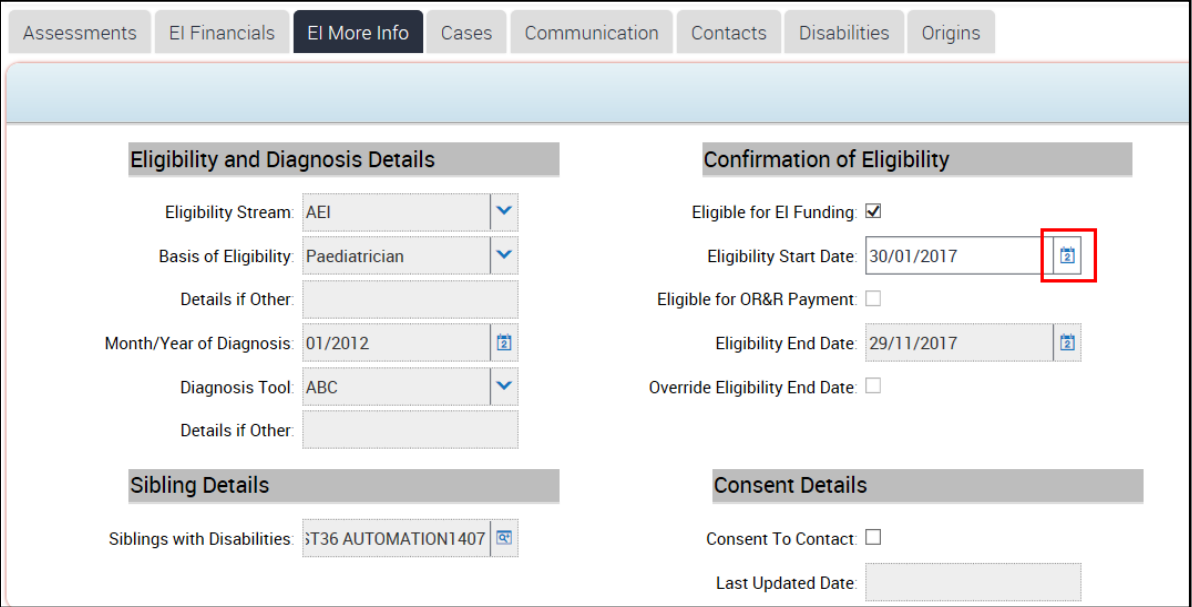
Steps	Actions
1	<p>Navigate to the <b>EI More Info</b> view tab.</p>  <p>The screenshot shows the 'Clients' form with the 'EI More Info' tab selected. The form includes fields for personal information (Middle Name, Title, Date of Birth, Age, Gender), contact information (Address), and financial details (Gross Family Weekly Income, Indigenous Origin). Below the navigation tabs, there are sections for 'Eligibility and Diagnosis Details', 'Confirmation of Eligibility', 'Sibling Details', and 'Consent Details'. The 'EI More Info' tab is highlighted with a red box.</p>
2	<p>Click the dropdown box and select <b>Eligibility Stream, Basis of Eligibility and Diagnostic Tool</b>.</p>  <p>The screenshot shows the 'EI More Info' form with the 'Eligibility Stream', 'Basis of Eligibility', and 'Diagnostic Tool' dropdown menus highlighted in red boxes. The 'Confirmation of Eligibility' section includes checkboxes for 'Eligible for EI Funding', 'Eligible for OR&amp;R Payment', and 'Override Eligibility End Date', along with date fields for 'Eligibility Start Date' and 'Eligibility End Date'. The 'Consent Details' section includes a 'Consent To Contact' checkbox and a 'Last Updated Date' field.</p>
3	<p> <b>Important Note:</b> Diagnostic Tool is not required for Better Start.</p>


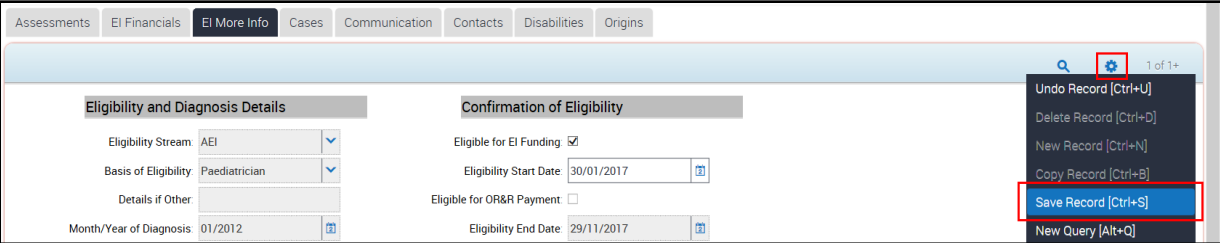
Steps	Actions
4	<p>Click the glyph to next to <b>Month/Year Diagnosis</b> to open the calendar. Select the <b>Month</b> and <b>Year</b>. Click <b>Done</b>.</p> 
5	<p>Click the glyph next to <b>Siblings with Disabilities</b> (only if applicable). The Client Siblings with Disabilities window will open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

Steps	Actions
7	<p>Enter information into all relevant fields then click the  (Save) icon.</p> <div data-bbox="248 170 874 745">  </div>

8	<p>Click <b>OK</b>.</p> <div data-bbox="248 835 1251 1283">  </div>
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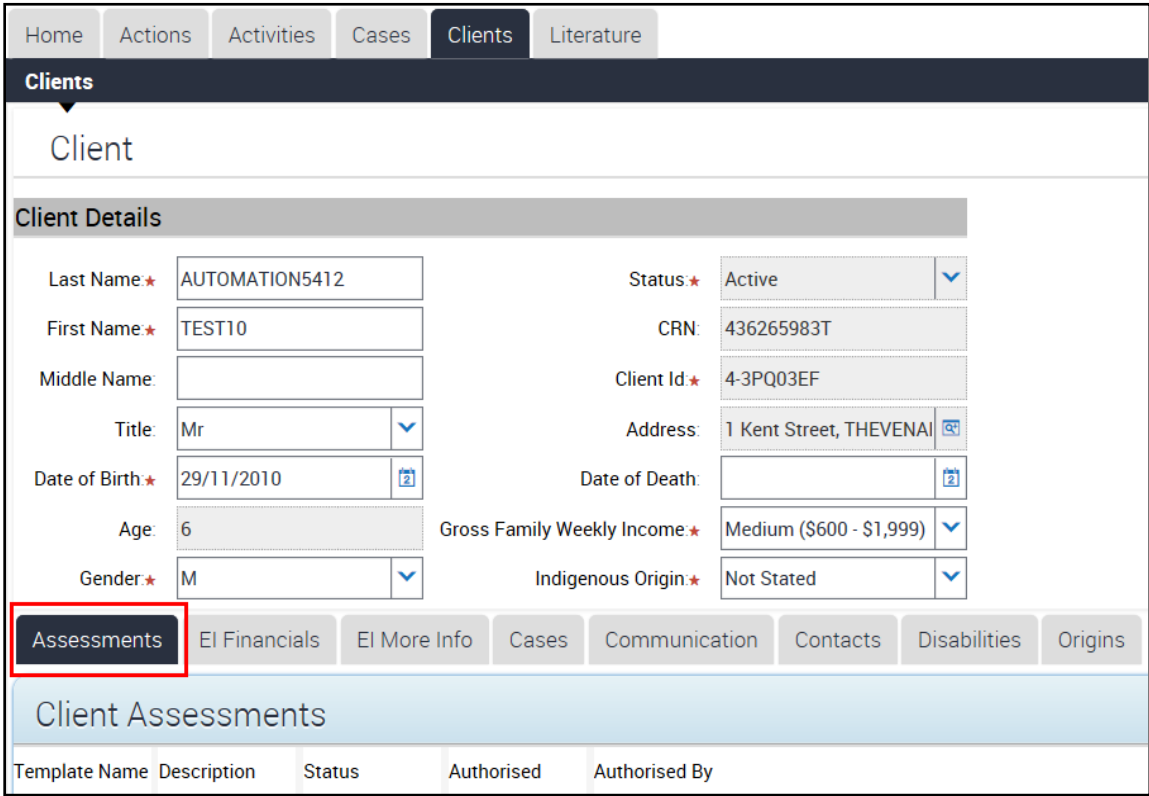

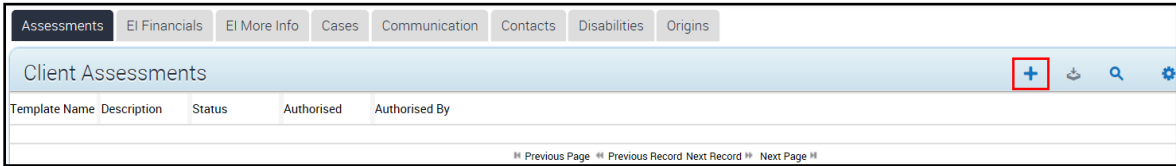

9	<p>Click on the box next to <b>Eligible for EI Funding</b> – a tick will appear automatically to confirm the client’s eligibility.</p> <div data-bbox="248 1402 1374 1682">  </div>
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Steps	Actions
10	<p>Update the <b>Eligibility Start Date</b> field (if applicable) by clicking the glyph.</p>  <p><b>Important Note:</b> 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.</p>

11	<p>Save the record by clicking into the  (Menu) icon and selecting <b>Save Record</b>.</p> 
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# Assessments View Tab

Steps	Actions																																	
1	<p>Navigate to the <b>Assessments</b> view tab.</p>  <p>The screenshot shows the 'Client' page with the 'Clients' tab selected. The 'Client Details' section contains the following information:</p> <table border="1"><tr><td>Last Name *</td><td>AUTOMATION5412</td><td>Status *</td><td>Active</td></tr><tr><td>First Name *</td><td>TEST10</td><td>CRN:</td><td>436265983T</td></tr><tr><td>Middle Name:</td><td></td><td>Client Id *</td><td>4-3PQ03EF</td></tr><tr><td>Title:</td><td>Mr</td><td>Address:</td><td>1 Kent Street, THEVENA</td></tr><tr><td>Date of Birth *</td><td>29/11/2010</td><td>Date of Death:</td><td></td></tr><tr><td>Age:</td><td>6</td><td>Gross Family Weekly Income *</td><td>Medium (\$600 - \$1,999)</td></tr><tr><td>Gender *</td><td>M</td><td>Indigenous Origin *</td><td>Not Stated</td></tr></table> <p>Below the details is a horizontal menu with tabs: Assessments, EI Financials, EI More Info, Cases, Communication, Contacts, Disabilities, and Origins. The 'Assessments' tab is highlighted with a red box.</p> <p>Below the menu is the 'Client Assessments' section with a table header:</p> <table border="1"><thead><tr><th>Template Name</th><th>Description</th><th>Status</th><th>Authorised</th><th>Authorised By</th></tr></thead></table>	Last Name *	AUTOMATION5412	Status *	Active	First Name *	TEST10	CRN:	436265983T	Middle Name:		Client Id *	4-3PQ03EF	Title:	Mr	Address:	1 Kent Street, THEVENA	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	Template Name	Description	Status	Authorised	Authorised By
Last Name *	AUTOMATION5412	Status *	Active																															
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Gender *	M	Indigenous Origin *	Not Stated																															
Template Name	Description	Status	Authorised	Authorised By																														
2	<p>Click the  (New) icon.</p>  <p>The screenshot shows the 'Client Assessments' table with the following header:</p> <table border="1"><thead><tr><th>Template Name</th><th>Description</th><th>Status</th><th>Authorised</th><th>Authorised By</th></tr></thead></table> <p>The table is currently empty. A red box highlights the '+' icon in the top right corner of the table area.</p>	Template Name	Description	Status	Authorised	Authorised By																												
Template Name	Description	Status	Authorised	Authorised By																														
3	<p>Click the glyph next to <b>Template Name</b>.</p>  <p>The screenshot shows the 'Client Assessments' table with the following header:</p> <table border="1"><thead><tr><th>Template Name</th><th>Description</th><th>Status</th><th>Authorised</th><th>Authorised By</th></tr></thead><tbody><tr><td></td><td></td><td>Not Started</td><td></td><td></td></tr></tbody></table> <p>A red box highlights a small glyph icon in the 'Template Name' column of the first row.</p>	Template Name	Description	Status	Authorised	Authorised By			Not Started																									
Template Name	Description	Status	Authorised	Authorised By																														
		Not Started																																

**Steps**      **Actions**

**4**      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

Search: Name x [ ] 1 - 2 of 2


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

Navigation: < Previous Page Previous Record Next Record Next Page >

Buttons: OK (circled in red), Cancel

**5**      Save the record by clicking the  (Save) icon.


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

Client Assessments +  Search

Template Name	Description	Status	Authorised	Authorised By
AEI - AA Checklist	AEI Advisor Checklist for registering new client	Not Started		

**6**      Click the **Status** dropdown box and select **In Progress**.

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


Client Assessments +  Search

Template Name	Description	Status	Authorised	Authorised
AEI - AA Checklist	AEI Advisor Checklist for registering new client	Not Started		

Dropdown menu: In Progress (highlighted), Completed

**7**      Click the dropdown box next to each item under **Answer**. All questions must be answered before saving the record.

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


Client Assessments +  Search

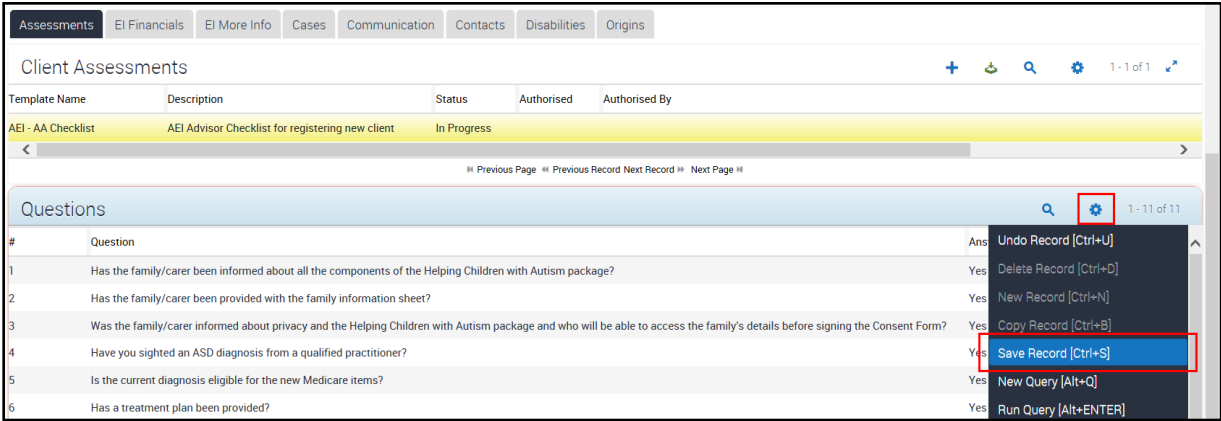
Template Name	Description	Status	Authorised	Authorised By
AEI - AA Checklist	AEI Advisor Checklist for registering new client	In Progress		

Questions

#	Question	Answer	Justific
1	Has the family/carer been informed about all the components of the Helping Children with Autism package?	Yes	
2	Has the family/carer been provided with the family information sheet?		
3	Was the family/carer informed about privacy and the Helping Children with Autism package and who will be able to access the family's details before signing the Consent Form?		
4	Have you sighted an ASD diagnosis from a qualified practitioner?		

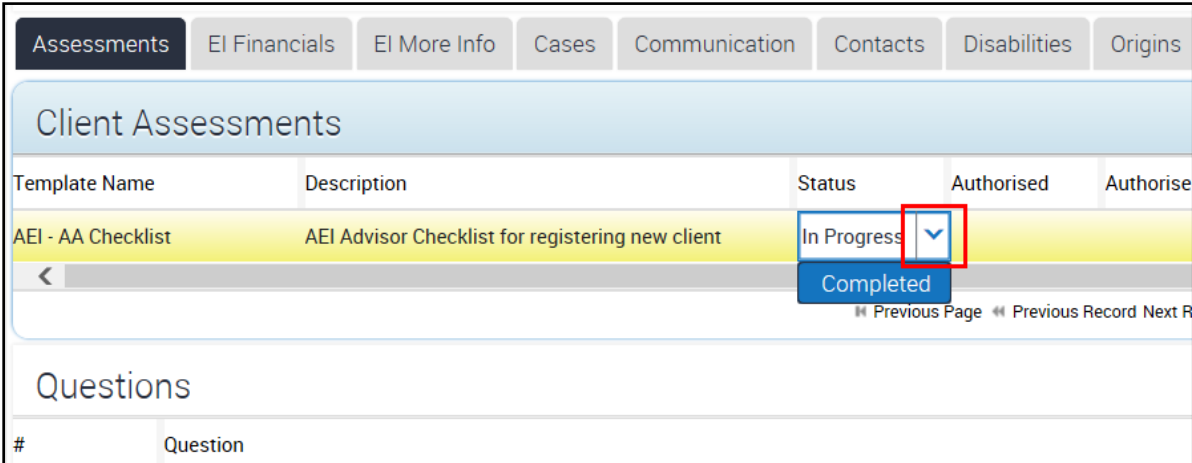
**Steps**      **Actions**

**8**      Save the record by clicking the  (Menu) icon and selecting **Save Record**.



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 this is a header for 'Client Assessments' with a search icon and a '1 - 1 of 1' indicator. A table lists assessment records. The first record is highlighted in yellow: 'AEI - AA Checklist' with description 'AEI Advisor Checklist for registering new client' and status 'In Progress'. Below the table is a 'Questions' section with a search icon and a '1 - 11 of 11' indicator. A menu is open over the 'Save Record' option, which is highlighted in blue. The menu items are: Undo Record [Ctrl+U], Delete Record [Ctrl+D], New Record [Ctrl+N], Copy Record [Ctrl+B], Save Record [Ctrl+S], New Query [Alt+Q], and Run Query [Alt+ENTER].

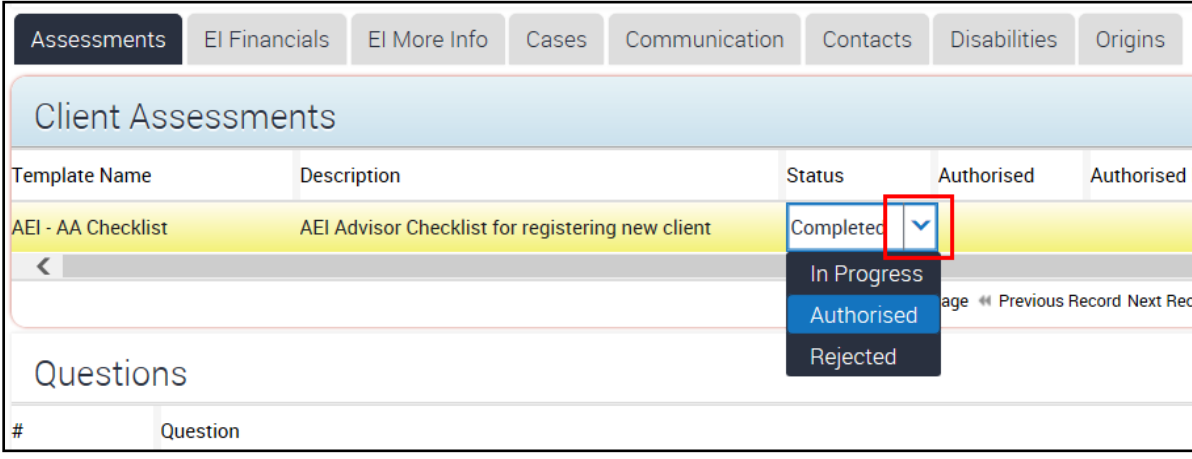
**9**      Click the **Status** drop down box and select **Completed** from the drop down list.




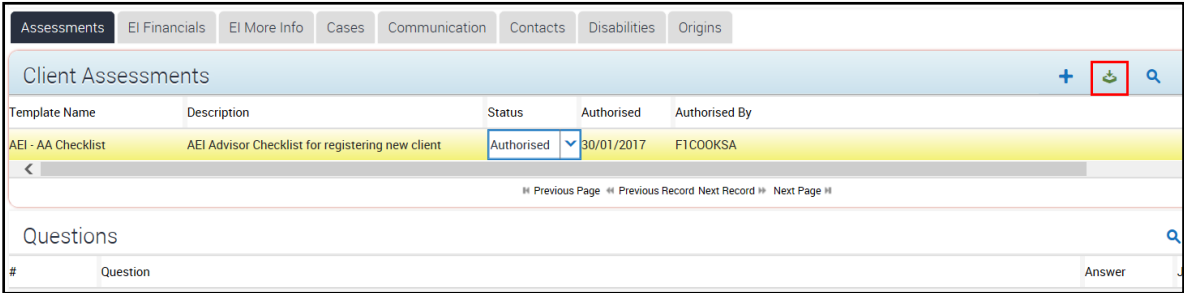
The screenshot shows the 'Client Assessments' interface. At the top, there are navigation tabs: Assessments, EI Financials, EI More Info, Cases, Communication, Contacts, Disabilities, and Origins. Below this is a header for 'Client Assessments' with a search icon and a '1 - 1 of 1' indicator. A table lists assessment records. The first record is highlighted in yellow: 'AEI - AA Checklist' with description 'AEI Advisor Checklist for registering new client' and status 'In Progress'. A dropdown menu is open over the 'Status' column, showing the 'Completed' option selected. The dropdown menu items are: In Progress, Completed, and Rejected. Below the table is a 'Questions' section with a search icon and a '1 - 11 of 11' indicator.

**10**      Once satisfied that the assessment has been completed correctly, click the **Status** dropdown box again and select **Authorised**.

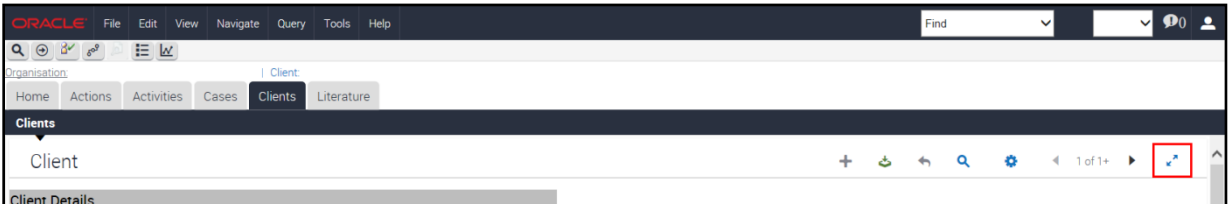
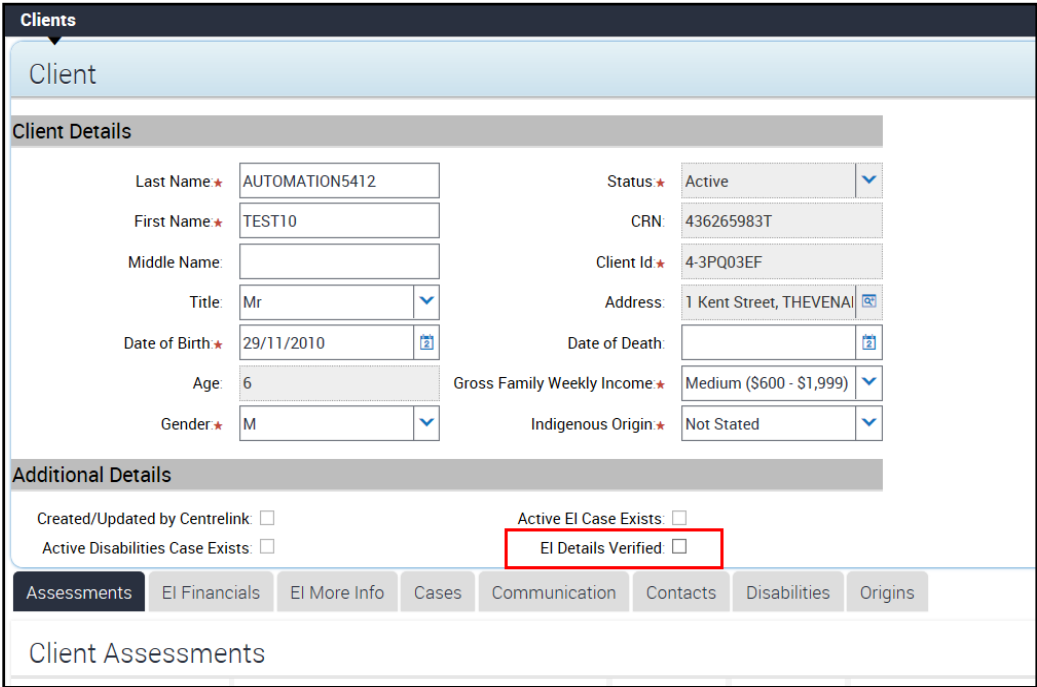
This step may be performed by another staff member in your organisation to ensure data quality.


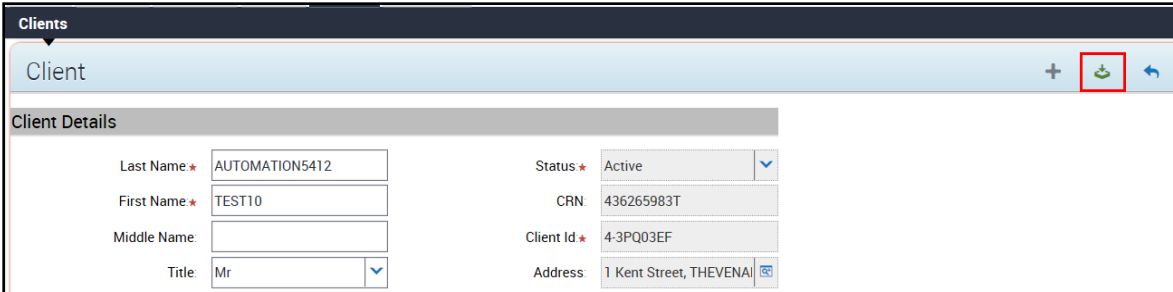


The screenshot shows the 'Client Assessments' interface. At the top, there are navigation tabs: Assessments, EI Financials, EI More Info, Cases, Communication, Contacts, Disabilities, and Origins. Below this is a header for 'Client Assessments' with a search icon and a '1 - 1 of 1' indicator. A table lists assessment records. The first record is highlighted in yellow: 'AEI - AA Checklist' with description 'AEI Advisor Checklist for registering new client' and status 'Completed'. A dropdown menu is open over the 'Status' column, showing the 'Authorised' option selected. The dropdown menu items are: In Progress, Authorised, and Rejected. Below the table is a 'Questions' section with a search icon and a '1 - 11 of 11' indicator.

Steps	Actions
11	<p>Save the record by clicking the  (Save) icon.</p> 

## EI Details Verified

Steps	Actions
1	<p>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.</p> 
2	<p>Then tick the <b>EI Details Verified</b> box.</p>  <p><b>Important Note:</b> 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.</p>

Steps	Actions																
3	<p>Save the record by clicking the  (Save) icon.</p>  <p>The screenshot shows a web interface for 'Clients'. At the top, there is a header 'Client' with a '+' icon, a 'Save' icon (highlighted with a red box), and a back arrow. Below the header is a 'Client Details' section with the following fields:</p> <table border="1"> <tr> <td>Last Name *</td> <td>AUTOMATION5412</td> <td>Status *</td> <td>Active</td> </tr> <tr> <td>First Name *</td> <td>TEST10</td> <td>CRN:</td> <td>436265983T</td> </tr> <tr> <td>Middle Name</td> <td></td> <td>Client Id *</td> <td>4-3PQ03EF</td> </tr> <tr> <td>Title:</td> <td>Mr</td> <td>Address:</td> <td>1 Kent Street, THEVENAL</td> </tr> </table>	Last Name *	AUTOMATION5412	Status *	Active	First Name *	TEST10	CRN:	436265983T	Middle Name		Client Id *	4-3PQ03EF	Title:	Mr	Address:	1 Kent Street, THEVENAL
Last Name *	AUTOMATION5412	Status *	Active														
First Name *	TEST10	CRN:	436265983T														
Middle Name		Client Id *	4-3PQ03EF														
Title:	Mr	Address:	1 Kent Street, THEVENAL														
4	<p>If applicable, you will now also be required to create a new Case record.</p> <p>For instructions on how to create a new case follow task card or training video <b>Autism Advisor and Better Start Registration and Information Service Create a New Case Record to create a new case record.</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)