



Find and edit a client

Task card

This task card discusses the following:

- [Find a client record](#)
 - [Method 1 – Client icon button](#)
 - [Method 2 – Go to search box](#)
- [Edit a client](#)
 - [The Client profile screen](#)
 - [Edit Client details screen](#)

KEY HIGHLIGHTS

- Do not add any personal information into the Client ID and Tag fields.
- Do not enter a client's full address if it is a sensitive location such as a refuge or shelter.
- Client and consent information is visible to the entire organisation and can be updated at any time.
- If a client does not provide consent, staff will only see the Client ID and no other identifying information such as name, date of birth and address details will be visible.
- Searching for a client can be completed by using either full or partial client information.
- Refer to the Data Exchange Protocols to confirm which conditions, disabilities and impairments fall into which categories.

Find a client record

There are two methods to find clients from the Data Exchange home page. Refer Figure 1.


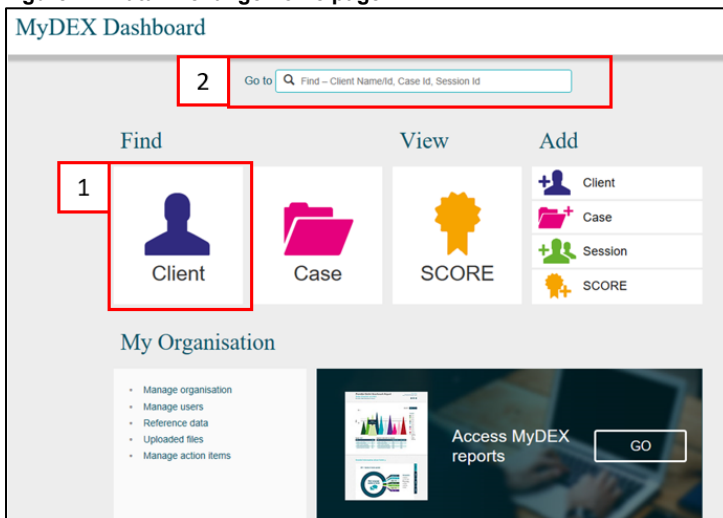
1. Select the client icon  under the **Find** menu; or
2. Type the client's name or Client ID in the **Go to** search box at the top of the screen



Figure 1 – Data Exchange home page



Method 1 – Client icon button

If you select the **Client Icon** button, the **Find a client** screen will display. Refer Figure 2.

Figure 2 – Find a client screen

Type in the client details that you know, such as a surname or select the client name from the list of clients at the bottom of the page.

Select **SEARCH** and the matching records will display under the **Results** section.

Select the **client's name hyperlink** and the **Client profile** screen will display. Refer Figure 4.

Searching can also be done by using either **full** or **partial** information. Partial searching allows you to search for a client by only using part of a name or client ID instead of the exact details.

You can search for a client by one of the following:

- Given name
- Family name
- Client ID
- The date period the client record was created between, and/or
- Tags.

Method 2 – Go to search box

In the Go To box at the top of the screen, start typing the details that you know such as the client's surname. As you type, the list of clients will narrow down. Refer Figure 3.

You can search by first name, surname or client ID.

Figure 3 – Go to search option

Edit a client

The Client profile screen

The **Client profile** screen contains the following information / functionality. Refer Figure 4.

1. The client's details
2. Select the **MORE v** button to see the clients consent, residential address, demographic and extended demographic details
3. Edit a client's details
4. Cases the client has been attached to
5. A list of sessions the client has attended across all cases
6. View client SCORES
7. Delete client – Can only be deleted if the client is not associated with a case.

Figure 4 – Client Profile screen

The screenshot shows the 'Client profile' screen for Ruby HENDERSON. The interface includes a header with a user icon and the title 'Client profile'. Below the header are two buttons: 'DELETE CLIENT' (labeled 7) and 'EDIT CLIENT DETAILS' (labeled 3). The main content area is divided into three sections: 1. Client details: Ruby HENDERSON, Client ID: 005, Name provided is a pseudonym: No, Estimated Date of Birth: No, Date of birth: 08/08/1942, Gender: Female, SCORES available: No, and a Tags field with '+ ADD' and 'SAVE TAGS' buttons. 2. A 'MORE v' button (labeled 2) to expand details. 3. A 'VIEW CLIENT SCORE' button (labeled 4). 4. Cases (6): A table with columns for Case ID, Outlet, Program activity, Sessions, and Created on. A '+ ADD A CASE' button (labeled 5) is at the top right. 5. Sessions (3): A table with columns for Session ID, Case ID, Session date, Service type, Participation, and Created on.

Case ID	Outlet	Program activity	Sessions	Created on
ZB113355	Catchment Team	Financial Crisis and Material Aid - Emergency Relief	4	09/08/2018
AZ0001	Bay Area Services	Financial Crisis and Material Aid - Emergency Relief	1	09/08/2018
Community_Event_1	Bay Area Services	Financial Crisis and Material Aid - Emergency Relief	2	08/08/2018
Transport: Tuesdays	Bay Area Services	Community and Home Support	2	03/08/2018
Food parcels	Bay Area Services	Financial Crisis and Material Aid - Emergency Relief	0	03/08/2018
Hot Meals on Wednesdays	Bay Area Services	Community and Home Support	0	03/08/2018

Session ID	Case ID	Session date	Service type	Participation	Created on
0010	ZB113355	13/08/2018	Intake/assessment	Support Person	13/08/2018
0002	Transport: Tuesdays	10/07/2018	Meals at Home	Client	09/08/2018
0002	Community_Event_1	08/08/2018	Material Goods	Client	08/08/2018

Edit client details screen

Select **EDIT CLIENT DETAILS** (refer Figure 4) to update client information including consent, residential address, demographic and extended demographic details.

The **Edit client details** screen will display. Refer Figure 5.

Figure 5 – Edit client details screen

Home > Client detail > Edit client details

Edit client details

All fields marked with an asterisk (*) are required.

Given name: * Ruby

Family name: * Henderson

Client ID: * 005

Name provided is a pseudonym:

Estimated Date of Birth:

Date of birth: * 08/08/1942 dd/mm/yyyy

Gender: * Female

Tags: [+ ADD](#)

Consent

Client consents for DSS to collect personal information from providers for storage on DSS Data Exchange:

Consent for future contact for survey / research / evaluation:

Residential address

Address line 1:
Street number and street name e.g. 123 Example St

Address line 2:

Suburb/Town: * GEELONG

State: * VIC

Postcode: * 3220

[Clear](#)

Demographic details

Country of birth: * England

Main language spoken at home: * English

Is the client of Aboriginal or Torres Strait Islander origin: * No

Does the client have one or more of the following impairments, conditions or disabilities?

- Intellectual learning
- Psychiatric
- Sensory/speech
- Physical/diverse
- Not stated/inadequately described
- None

Program specific client details

This data forms a part of a few additional discrete questions for this program's reporting needs. These items only appear and apply to clients when they are attached during the case creation process.

Accommodation setting: * Independent living unit

Living arrangements: * Single (person living alone)

DVA Card status: * No DVA entitlement

Existence of carer: * Yes

Extended demographic details

The extended client demographic information below is part of the Partnership Approach. Providing responses to this information is optional. However, if provided will improve the reports available to your organisation.

Homeless indicator: No

Highest level of education/qualification:

Employment status:

Main source of income:

Approximate gross income (income per (income frequency):)

Is client a carer:

NDIS eligibility:

[Cancel](#) [SAVE](#)

Update the client's information as required.

Select **SAVE** when complete.

The **Client profile** screen will re-display.

Refer to the [Add a case](#) task card to add the client to a case.

Refer to the [Add a session](#) task card to add the client to a session.

Refer to the [Add a SCORE assessment](#) task card to record a SCORE assessment for the client.

You can find more information on outlets, clients, cases, and sessions on the [Data Exchange Protocols](#) and the [Training page](#).

For system support, contact the Data Exchange Helpdesk by email dssdataexchange.helpdesk@dss.gov.au or on 1800 020 283.