



Add a case

Task card

This task card discusses the following:

- [What is a case?](#)
- [Add a case – Case details](#)
- [Add a case – Attach clients](#)
- [Add a case – Review](#)
- [Add a case – Finish](#)
- [Referrals to other services and Exit reasons](#)
- [Special data entry fields](#)

KEY HIGHLIGHTS

- **The case identity (ID) should not contain any personal information, such as any part of a client's first or last names, Customer Reference Numbers (CRN) or My Aged Care ID reference numbers.**
- A case should be created for each outlet even if the case is delivered across multiple outlets.
- Primary and secondary referral source and reasons can be added to a client record at any time.
- The use of special characters such as * & % # @ should **not** be included in the free text fields.
- Some programs have special data entry fields apply to cases.

What is a case?

A **case** is the first step in recording service delivery information within the Data Exchange. A **case** reflects how you deliver a service. Depending on the nature of your program, a case may link to an individual, a couple, a family or a group of unrelated individuals.

A **case** captures:

- where the service was or will be delivered
- the program activity it is funded by, and
- the client(s) who have or will attend this service.

Add a case – Case details

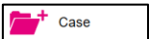
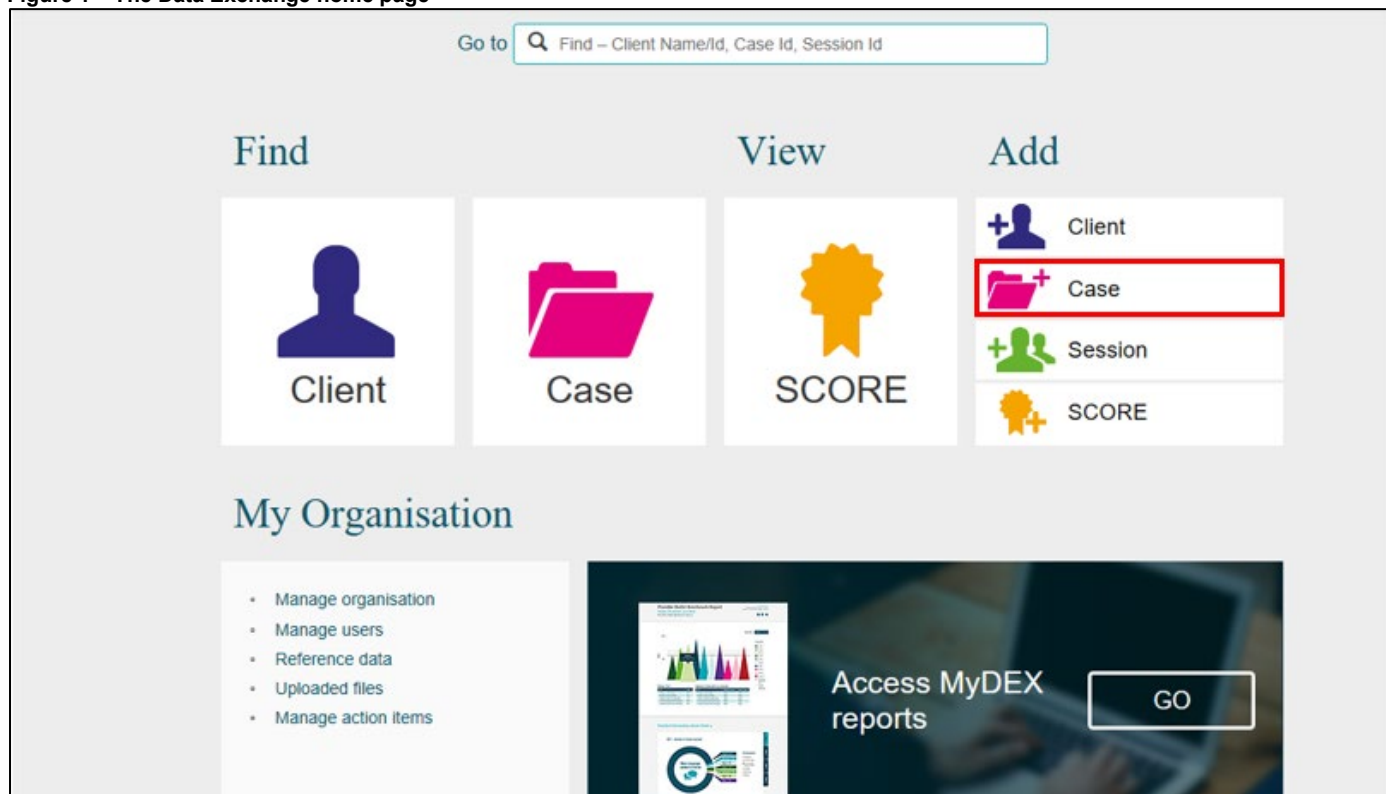
From the Data Exchange home page, select the **Add case** icon  under the **Add** menu. Refer to Figure 1.

Figure 1 – The Data Exchange home page

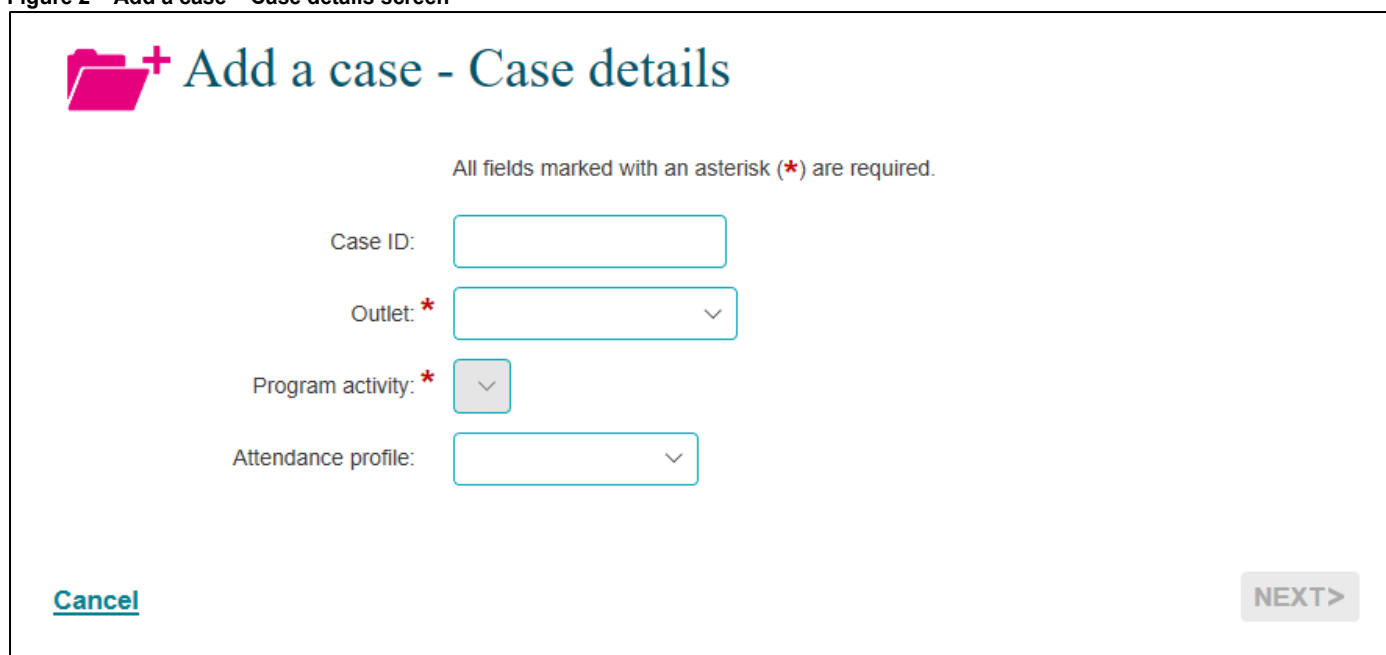


The **Add a case – Case details** screen will display. Refer to Figure 2.

Enter the case details.

Fields marked with an * are mandatory and must be completed before you can move to the next screen.

Figure 2 – Add a case – Case details screen



Note: The **Total number of unidentified clients associated with case** field will only display on the **Add a case – Case details** screen once a program activity is selected. Refer to Figure 3.

Figure 3 – Total number of unidentified clients associated with case field



 **Add a case - Case details**

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

Case ID:

Outlet: *

Program activity: *

Total number of unidentified clients associated with case:

Attendance profile:

[Cancel](#) [NEXT >](#)

Do not enter any personal information into the Case ID field, such as first or last names, Customer Reference Numbers (CRN) or My Aged Care ID reference numbers.

Table 1 – Case details field descriptions (Refer Figures 2 and 3)

FIELD	DESCRIPTION
Case ID	Enter the Case ID or leave it blank for numerical auto-generation. Note: The use of Special characters such as * & % # @ should not be included in the free text fields.
Outlet*	Select the Outlet where the service is delivered. If a case is delivered across multiple locations, a separate case should be created for each outlet. You will only see outlets within your organisation to which your Data Exchange Organisation Administrator has provided you access.
Program activity*	Select the Program activity that the service is delivered under. If a client is receiving a service from multiple programs, then separate cases will need to be created for each program activity. Note: Refer to page 8 for additional details for sub-contractors and consortia arrangements.
Total number of unidentified clients associated with case	Organisations are strongly encouraged to create individual client records for as many of their clients as possible. If it is impractical to collect information about individual participants, for example in community outreach activities where many members of the general public may participate, the aggregate number of unidentified clients is recorded. For example, if you expect 150 people to attend the event over the life of the case you would enter 150 in this field. The field should not be used to ‘bulk report’ services to individuals or small groups where it is possible to collect the details of each individual client. For group activities where a combination of clients and unidentified persons are expected to attend, enter in the expected number of unidentified persons only. You can then add the clients that are recorded in the Data Exchange in the next page. Note: If the number of actual attendees at the session is greater than the number of expected attendees recorded against the case, you must edit the case record and increase the number of clients expected to attend before recording the session.
Attendance profile	Select the relationship between the clients attached to the case. If there is only one client attached to the case, then no option would be selected. The options are: • Family • Community event • Peer support group • Couple • Cohabitants

Once completed, please select **NEXT**.

Add a case – Attach clients

The **Add a case – Attach clients** screen will display.

Attach the relevant client(s) to the case. Refer to Figure 4.

To do this use the:

1. **Search clients** field at the top of the screen, or the
2. **Results** section.

Figure 4 – Add a case – Attach clients screen



Add a case - Attach clients

Please record the registered clients associated with the case.

Search clients

1

Given name:

Family name:

Client ID:

Tags

SEARCH

Clear

+ ADD TO SEARCH

Results (4)

2

☐ Select all

	Name ↕	Client ID ↕	Date of Birth ↕	Gender ↕	Created ↕	
☐	 Mark CALLAWAY	006	02/11/1987	Man or male	18/11/2024	◀
☐	 Janet MILLER	005	02/07/1987	Woman or female	12/11/2024	◀
☐	 Hugh JACKMAN	002	04/05/1979	Man or male	23/10/2024	◀
☐	 Cathy FREEMAN	001	07/12/1982	Woman or female	23/10/2024	◀

ATTACH SELECTED CLIENTS

Clients attached to the case

No clients currently attached to this case

< BACK

Cancel

NEXT >

The order of the **Results** section can be changed by clicking on the relevant heading title such as **Name**, **Client ID**, **Date of Birth**, **Gender** or **Created on**.

The selected clients will display under the **Clients attached to the case** heading. Refer to Figure 5.

Figure 5 – Clients attached to the case field



Add a case - Attach clients

Please record the registered clients associated with the case.

Search clients

Given name:

Family name:

Client ID:

Tags

+ ADD TO SEARCH

SEARCH

[Clear](#)

Results

No records found

Clients attached to the case (4)

	Name	Client ID	Date of Birth	Gender	Created	
☐	 Mark CALLAWAY	006	02/11/1987	Man or male	18/11/2024	◀
☐	 Janet MILLER	005	02/07/1987	Woman or female	12/11/2024	◀
☐	 Hugh JACKMAN	002	04/05/1979	Man or male	23/10/2024	◀
☐	 Cathy FREEMAN	001	07/12/1982	Woman or female	23/10/2024	◀

REMOVE SELECTED CLIENTS

< BACK

[Cancel](#)

NEXT >

Associate clients with the case by selecting the **tick box** next to the relevant client's name.

Select **ATTACH SELECTED CLIENTS.**

Select **NEXT.**

Add a case – Review

The **Add a case – Review** screen displays and allows you to review and edit the details of the case you have entered. Refer to Figure 6.

Figure 6 – Add a case – Review screen



Add a case - Review

Please review your answers. Select "Back" to edit your answers.

Case details

Case ID:

Training Case

Outlet:

Training Outlet 1

Program activity:

Training Activity

Total number of unidentified clients associated with case:

0

Attendance profile:

Clients attached to the case (4)

Name	Client ID	Date of Birth	Gender	Created
 Mark CALLAWAY	006	02/11/1987	Man or male	18/11/2024
 Cathy FREEMAN	001	07/12/1982	Woman or female	23/10/2024
 Hugh JACKMAN	002	04/05/1979	Man or male	23/10/2024
 Janet MILLER	005	02/07/1987	Woman or female	12/11/2024

< BACK

[Cancel](#)

SUBMIT

Select **<BACK** to edit the details or [Cancel](#) to stop the process and remove the case.

If the details are correct, select **SUBMIT**.

Add a case – Finish

The **Add a case – Finish** screen will display with the following. Refer to Figure 7.

1. A message box to advise the successful creation of the case and that a session must be added for the clients to be counted in reports.
2. A summary of the case you have created. If you did not enter your own case ID, a **Case ID** will automatically be created.
3. A listing of the clients that are attached to the case.
4. **What can you do now?** section where you can **Add a session** to the case or **Add another client** to the case.
5. **I want to...** box where you can complete other tasks.
6. **Go to...** search field where you can search for clients, cases and sessions.

Figure 7 – Add a case – Finish screen

The screenshot shows the 'Add a case - Finish' screen. At the top, there is a 'Go to' search bar (6) with the placeholder text 'Find - Client Name/Id, Case Id, Session Id'. Below this is a progress bar with four steps: 1. Case details, 2. Attach clients, 3. Review, and 4. Finish. A green checkmark icon (1) indicates successful case creation, with a message: 'Case Training Case successfully added. A session must be added for clients to be counted in reports.' The main section is titled 'Add a case - Finish' and 'Case details'. It displays case information: Case ID 'Training Case' (2), Outlet 'Training Outlet 1', Program activity 'Training Activity', and 'Total number of unidentified clients associated with case: 0'. Below this is a table titled 'Clients attached to the case (4)' (3) with columns: Name, Client ID, Date of Birth, Gender, and Referral source and reasons. The table lists four clients: Cathy FREEMAN (001, 07/12/1982, Woman or female), Hugh JACKMAN (002, 04/05/1979, Man or male), Janet MILLER (005, 02/07/1987, Woman or female), and Mark CALLAWAY (006, 02/11/1987, Man or male). At the bottom, the 'What can you do now?' section (4) offers two options: 'Add a session to this case' and 'Add another client to this case'. On the right side, there is a sidebar titled 'I WANT TO...' (5) with a list of actions: Find a client, Find a case, View a client SCORE, Add a client, Add a case, Add a session, Add a client SCORE, Manage organisation, Manage users, Reference data, Uploaded files, and Go to home page.

Home > Add a case

1 Case details 2 Attach clients 3 Review 4 Finish

1 Case Training Case successfully added.
A session must be added for clients to be counted in reports.

Add a case - Finish

Case details

Case ID: [Training Case](#) 2
Outlet: Training Outlet 1
Program activity: Training Activity
Total number of unidentified clients associated with case: 0
Attendance profile:

Clients attached to the case (4) 3

Name	Client ID	Date of Birth	Gender	Referral source and reasons
Cathy FREEMAN	001	07/12/1982	Woman or female	
Hugh JACKMAN	002	04/05/1979	Man or male	
Janet MILLER	005	02/07/1987	Woman or female	
Mark CALLAWAY	006	02/11/1987	Man or male	

What can you do now? 4

- [Add a session](#) to this case
- [Add another client](#) to this case

I WANT TO... 5

- Find a client
- Find a case
- View a client SCORE
- Add a client
- Add a case
- Add a session
- Add a client SCORE
- Manage organisation
- Manage users
- Reference data
- Uploaded files
- Go to home page

Referrals to other services and Exit reason

You can add **Referral source and reasons** and an **Exit reason** to the clients attached to this case. Refer to Figures 7 and 10.

Table 2 – Icon descriptions for Referral source and reasons (Refer Figures 6 and 9)

ICON	DESCRIPTION
	This icon indicates that a referral source and reasons can be added for this client for this case. Note: Refer to page 9 for additional information for the Commonwealth Home Support Program (CHSP).
	This icon indicates that no further referral source and reasons can be added for this client for this case.

Select the **Add Referral source and reasons** icon  found next to the relevant client.

The **Edit referral source and reasons** screen will display. Refer to Figure 8.

Figure 8 – Edit referral source and reasons screen

Home > Add a case > Case ID: Training Case > Edit referral source and reasons

Edit referral source and reasons

Client associated with the case

Name: Mark CALLAWAY

Client ID: 006

Case ID: Training Case

Outlet: Training Outlet 1

Program activity: Training Activity

Total number of unidentified clients associated with case: 0

Referral source and reasons for seeking assistance

Referral source:

Reasons for seeking assistance:

Physical health

Mental health, wellbeing and self-care

Personal and family safety

Age-appropriate development

Community participation & networks

Family functioning

Financial resilience

Employment

Education and skills training

Material wellbeing and basic necessities

Housing

Reason for client leaving this case

This data provides information about the circumstances surrounding the ending of a client's relationship with a case. This contributes to a general understanding of the pattern of client interaction with this program and gives indications as to the reason for disengagement with the provider.

Exit reason:

Cancel

SAVE

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Table 3 –Field descriptions for the Edit referral source and reasons screen (Refer Figures 7 and 8)

FIELD	DESCRIPTION
Referral source	Select the appropriate referral source for the client.
Reasons for seeking assistance	Select the appropriate reason for seeking assistance. One primary reason can be selected. More than one secondary reason can be selected.

Select the relevant **Referral source** and **Reasons for seeking assistance**. Refer to Figure 9.

Figure 9 – Edit referral source and reasons screen

Edit referral source and reasons

Client associated with the case

Name: Mark CALLAWAY
 Client ID: 006
 Case ID: Training Case
 Outlet: Training Outlet 1
 Program activity: Training Activity
 Total number of unidentified clients associated with case: 0

Referral source and reasons for seeking assistance

Referral source:

Reasons for seeking assistance:

- ☐ Physical health
- ☐ Mental health, wellbeing and self-care
- ☐ Personal and family safety
- ☐ Age-appropriate development
- ☐ Community participation & networks
- ☒ **Primary** Family functioning
- ☒ **Secondary** Financial resilience
- ☐ Employment
- ☐ Education and skills training
- ☐ Material wellbeing and basic necessities
- ☐ Housing

Reason for client leaving this case

This data provides information about the circumstances surrounding the ending of a client's relationship with a case. This contributes to a general understanding of the pattern of client interaction with this program and gives indications as to the reason for disengagement with the provider.

Exit reason:

[Cancel](#)

Select **SAVE**.

The **Case details** screen will display.



The **Referral source and reasons** icon will display as . Refer to Figure 10.

Figure 10 – Edit referral source and reasons screen

[Home](#) > [Find a case](#) > Case ID: Training Case

 **Case details**

DELETE CASE

EDIT CASE DETAILS

Case ID: Training Case

Outlet: Training Outlet 1

Program activity: Training Activity

Total number of unidentified clients associated with case: 0

Attendance profile:

End date:

Clients attached to the case (4)

ATTACH/DETACH CLIENTS

Name	Client ID	Date of Birth	Gender	Referral source and reasons
 Cathy FREEMAN	001	07/12/1982	Woman or female	 
 Hugh JACKMAN	002	04/05/1979	Man or male	 
 Janet MILLER	005	02/07/1987	Woman or female	 
 Mark CALLAWAY	006	02/11/1987	Man or male	 

Sessions associated with the case

ADD SESSION

No sessions associated with the case

< BACK

I WANT TO...

Find a client

Find a case

View a client SCORE

Add a client

Add a case

Add a session

Add a client SCORE

Manage organisation

Manage users

Reference data

Uploaded files

Go to home page

Select **+ADD SESSION** to add a session to the case.

Select **<BACK** to go to the **Find a case** screen, or the **I want to...** box where you can complete other tasks.

Exiting a client from a case

To record a client has exited from a case, open the existing case record.

If a client does not have any referrals recorded, select the blank Referral source and reasons icon.

If a client has any referrals recorded, select the triangle at right of Referral source and reasons icon and then select the 'edit' button. See figure 11.

Figure 11 – Edit referral source and reasons screen



Case details

DELETE CASE

EDIT CASE DETAILS

Case ID: Training Case

Outlet: Training Outlet 1

Program activity: Training Activity

Total number of unidentified clients associated with case: 0

Attendance profile:

End date:

Clients attached to the case (4)

ATTACH/DETACH CLIENTS

Name	Client ID	Date of Birth	Gender	Referral source and reasons
 Cathy FREEMAN	001	07/12/1982	Woman or female	
 Hugh JACKMAN	002	04/05/1979	Man or male	
 Janet MILLER	005	02/07/1987	Woman or female	
 Mark CALLAWAY	006	02/11/1987	Man or male	

Referral source

No referral source found.

Referral reasons

No referral reasons found.

Exit Reason

Client terminated the service



The **Edit referral source and reasons** screen will display. Refer to Figure 12.

Figure 12 – Edit referral source and reasons screen

Edit referral source and reasons

Client associated with the case

Name: Mark CALLAWAY

Client ID: 006

Case ID: Training Case

Outlet: Training Outlet 1

Program activity: Training Activity

Total number of unidentified clients associated with case: 0

Referral source and reasons for seeking assistance

Referral source:

Reasons for seeking assistance:

- ☐ Physical health
- ☐ Mental health, wellbeing and self-care
- ☐ Personal and family safety
- ☐ Age-appropriate development
- ☐ Community participation & networks
- ☐ Family functioning
- ☐ Financial resilience
- ☐ Employment
- ☐ Education and skills training
- ☐ Material wellbeing and basic necessities
- ☐ Housing

Reason for client leaving this case

This data provides information about the circumstances surrounding the ending of a client's relationship with a case. This contributes to a general understanding of the pattern of client interaction with this program and gives indications as to the reason for disengagement with the provider.

Exit reason:

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

Select the exit reason from the **Reason for client leaving this case** drop down list.

Select **SAVE**.

Special Data Entry Fields

Additional information for sub-contracted or consortia arrangements

Sub-contracted or consortia arrangement

If you are delivering a program activity under a **sub-contracted** or **consortia arrangement**:

Select the **Program activity** which shows the delivery partner's name in brackets. Refer to Figure 13.

For example:

Figure 13 – Program activity showing as a sub-contracted or consortia arrangement



Case ID:

Outlet: *

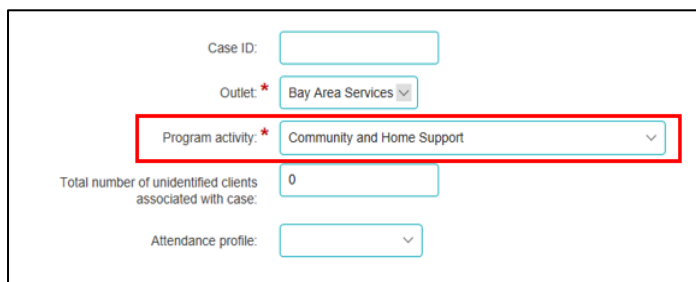
Program activity: *

Total number of unidentified clients associated with case:

Attendance profile:

If you are directly funded to deliver the program activity only the name of the program activity will be shown. Refer to Figure 14.

Figure 14 – Program activity delivered by directly funded organisation



Case ID:

Outlet: *

Program activity: *

Total number of unidentified clients associated with case:

Attendance profile:

Additional fields for the Family Law Services program case

Parenting agreement outcome

This field applies to all Family Law Services programs, except the Children's Contact Services and Supporting Children after Separation program activities. The Parenting Agreement Field has three options to select from. Refer to Figure 15.

Figure 15 – Parenting Agreement Outcome options

Parenting agreement

Parenting agreement outcome:

Full

Partial

Not Reached

Section 60(I) certificate

Section 60(I) certificate type:

Once a Parenting agreement option is selected additional fields display. Refer to Figure 16.

Figure 16 – Parenting Agreement additional fields

Parenting agreement

Parenting agreement outcome:

Full

Date of Parenting agreement: *

dd/mm/yyyy

Legal practitioner assisted with formalising parenting agreement?: *

☐ Yes

☐ No

If you mistakenly select a value for the Parenting agreement outcome a blank value can be selected, cancelling out the incorrectly input value. Refer to Figure 17.

Figure 17 – Selecting a blank Parenting Agreement outcome

Parenting agreement

Parenting agreement outcome:

Full

Partial

Not Reached

Section 60(I) certificate

Section 60(I) certificate type:

Once the fields are completed the next button can be selected to move to the next screen. Refer to Figure 18.

Figure 18 – Select the next button

Parenting agreement

Parenting agreement outcome:

Full

Date of Parenting agreement: *

07/02/2019

dd/mm/yyyy

Legal practitioner assisted with formalising parenting agreement?: *

☒ Yes

☐ No

Section 60(I) certificate

Section 60(I) certificate type:

Cancel

NEXT >

These fields can be completed at the time of creating the case, or at a later stage through the edit case process.

Section 60(I) certificate type

This field applies to all Family Law Services programs, except the Children's Contact Services and Supporting Children after Separation program activities. This field applies to relevant organisations delivering these services. The Section 60(I) certificate type field has five options to select from. Refer to Figure 19.

Figure 19 – Section 60(I) certificate type options

Section 60(I) certificate type:

- Attended - genuine effort
- Attended - not genuine effort
- Matter inappropriate for resolution
- Not held due to refusal or failure of other person to attend
- FDR began - considered inappropriate to continue

Once a Section 60(I) certificate type option is selected, an additional field displays. Refer to Figure 20.

Figure 20 – Section 60(I) certificate type additional fields

Section 60(I) certificate type:

Section 60(I) certificate type: Attended - genuine effort

Date issued: * dd/mm/yyyy

If you mistakenly select a value for the Section 60(I) certificate type, a blank value may be selected, cancelling out the incorrectly input value. Refer to Figure 21.

Figure 21 – Selecting a blank Section 60(I) certificate type

Section 60(I) certificate type:

- Attended - genuine effort
- Attended - not genuine effort
- Matter inappropriate for resolution
- Not held due to refusal or failure of other person to attend
- FDR began - considered inappropriate to continue

Once the fields are completed the next button can be selected to move to the next screen. Refer to Figure 22.

Figure 22 – Select the next button

Section 60(I) certificate type:

Section 60(I) certificate type: Attended - genuine effort

Date issued: * 01/11/2019 dd/mm/yyyy

[Cancel](#) **NEXT >**

These fields can be completed at the time of creating the case, or at a later stage through the edit case process.

Additional fields for Commonwealth Home Support Program (CHSP) case

Referral source and reasons

Extra **referral sources and reasons** are available for CHSP. To record a client's referral source and reason, open the existing **case** record and select the **Referral source and reasons** icon. Refer to Figure 23.

Figure 23 – Case screen



Case details

DELETE CASE **EDIT CASE DETAILS**

Case ID: Tuesdays
Outlet: CHSP 2025 Onwards
Program activity: Group social support
Total number of unidentified clients associated with case: 0
Attendance profile:
End date:

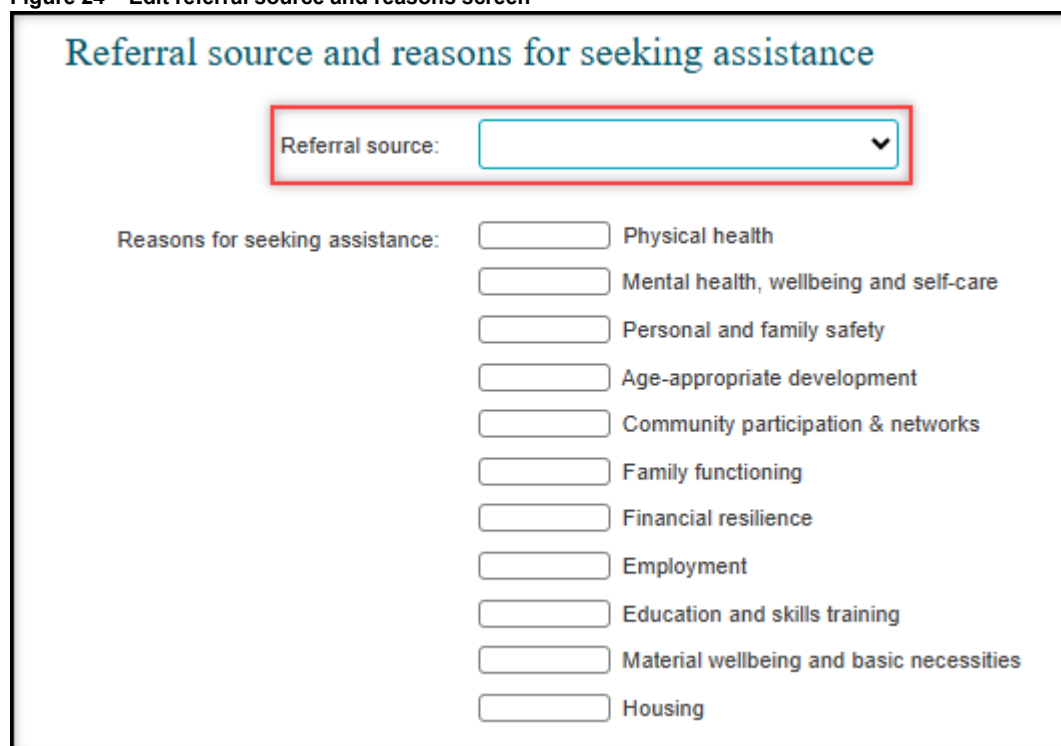
Clients attached to the case (3)

ATTACH/DETACH CLIENTS

Name	Client ID	Date of Birth	Gender	Referral source and reasons
 Beth FULLER	178	17/04/1951	Woman or female	
 Katerina KARAGIANNIS	177	22/11/1950	Woman or female	
 Ruby SOHO	179	11/12/1949	Woman or female	

The **Edit referral source and reason** screen will display. Refer to Figure 24.

Figure 24 – Edit referral source and reasons screen



Referral source and reasons for seeking assistance

Referral source:

Reasons for seeking assistance:

- ☐ Physical health
- ☐ Mental health, wellbeing and self-care
- ☐ Personal and family safety
- ☐ Age-appropriate development
- ☐ Community participation & networks
- ☐ Family functioning
- ☐ Financial resilience
- ☐ Employment
- ☐ Education and skills training
- ☐ Material wellbeing and basic necessities
- ☐ Housing

Select from the **Referral source** and the **Reasons for seeking assistance** drop down list the applicable source and reason. Refer to Figure 15.

Select **SAVE**.

Extra Client profile information

CHSP specific client profile data requirements will only appear if a client is attached to a case that has a CHSP specific program activity.

Once a client has added to the Data Exchange and attached to a CHSP specific program activity case, a **yellow exclamation mark** will display next to their name indicating that extra client profile information needs to be added for this client. Refer to Figure 25.

Select the **client's name** next to the **yellow exclamation mark**.

Figure 25 – Case screen highlighting yellow exclamation mark



This case requires program specific data items to be added to each client profile before a session can be added.

Case details

DELETE CASE

EDIT CASE DETAILS

Case ID: Tuesdays

Outlet: CHSP 2025 Onwards

Program activity: Group social support

Total number of unidentified clients associated with case: 0

Attendance profile:

End date:

Clients attached to the case (3)

ATTACH/DETACH CLIENTS

Name	Client ID	Date of Birth	Gender	Referral source and reasons
 Beth FULLER	178	17/04/1951	Woman or female	 
 Katerina KARAGIANNIS	177	22/11/1950	Woman or female	 
 Ruby SOHO	179	11/12/1949	Woman or female	 

The **Edit client details** screen will display with the items that need to be completed. Refer to Figure 26.
Scroll to the **Program specific client details** section.

Figure 26 – Edit client details screen

Edit client details

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

Given name:

Family name:

Client ID:

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:

Living arrangements:

DVA Card status:

Existence of carer:

Is the Client Registered for My Aged Care (MAC)?:

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:

Highest level of education/qualification:

Employment status:

Main source of income:

Approximate gross income (income whole dollars only): per (income frequency):

Year of first arrival in Australia: in month of:

Visa type:

Ancestry:

Is client a carer:

NDIS eligibility:

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

All the fields in the **Program specific client details** section are **mandatory**. Refer to Table 2

Table 2 – Descriptions for CHSP program specific client details fields (Refer Figure 17)

FIELD	DESCRIPTION
Accommodation setting	Select the Accommodation setting that best describes the client's current status.
Living arrangements	Select the Living arrangement that best describes the client's current status. If the client lives with others who are not accessing a service with your organisation they should be recorded as their current living arrangement status. Example 1: A client attends a session alone and they reside with their partner; the Living arrangement selected is 'Couple'.

FIELD	DESCRIPTION
	Example 2: A client attends a session alone and they reside with a relative such as their 40-year-old child; the Living arrangement selected is 'Group (related adults)'. Example 3: A client attends a session alone and they reside with non-related adults; the Living arrangement selected is Group (unrelated adults).
DVA Card status	Select the Department of Veteran Affairs (DVA) card that the client receives.
Existence of carer	Select Yes or No .
Is the client registered for My Aged Care (MAC)?	Select Yes or No .
Enter MAC ID	Enter the MAC ID in the correct for format (ACNNNNNNNNN)

Select **SAVE**.

Once the information is added, the green exclamation mark a **Successfully saved** message will display. Refer to Figure 27.

Figure 27 – Case screen with updated program specific client data


Successfully saved



Case details

DELETE CASE EDIT CASE DETAILS

Case ID: Tuesdays

Outlet: CHSP 2025 Onwards

Program activity: Group social support

Total number of unidentified clients associated with case: 0

Attendance profile:

End date:

Clients attached to the case (3)

ATTACH/DETACH CLIENTS

Name	Client ID	Date of Birth	Gender	Referral source and reasons
 Beth FULLER	178	17/04/1951	Woman or female	 
 Katerina KARAGIANNIS	177	22/11/1950	Woman or female	 
 Ruby SOHO	179	11/12/1949	Woman or female	 

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

For system support, email the [Data Exchange Helpdesk](#) or use our [online contact form](#).