Find and edit case

Task card

This task card discusses the following:

KEY HIGHLIGHTS

- A case can be updated at any time and is not dependant on a reporting period.
- Cases can be closed if they are no longer required.
- The use of special characters such as * & % # @ should **not** be included in the free text fields as they are used as search functions in the Data Exchange.

Information on updating cases

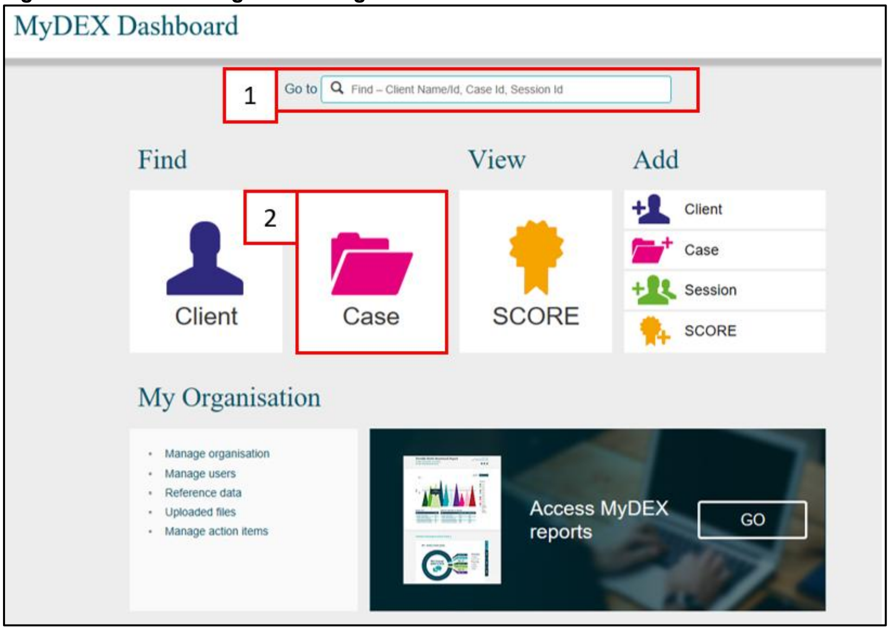
A case is not dependent on a reporting period and can be updated at any time. Case IDs should not contain any personal information, such as a client's first or last names, Customer Reference Numbers (CRN) or My Aged Care reference numbers.

Finding a case

There are a number of ways to find an existing case. Refer to Figure 1. Go to the Data Exchange homepage and either:

1. In the **Go to** field - start typing the case ID or name and the field will provide a drop down list to select from
2. Select the **Find Case** action tile

Figure 1 - Data Exchange Home Page

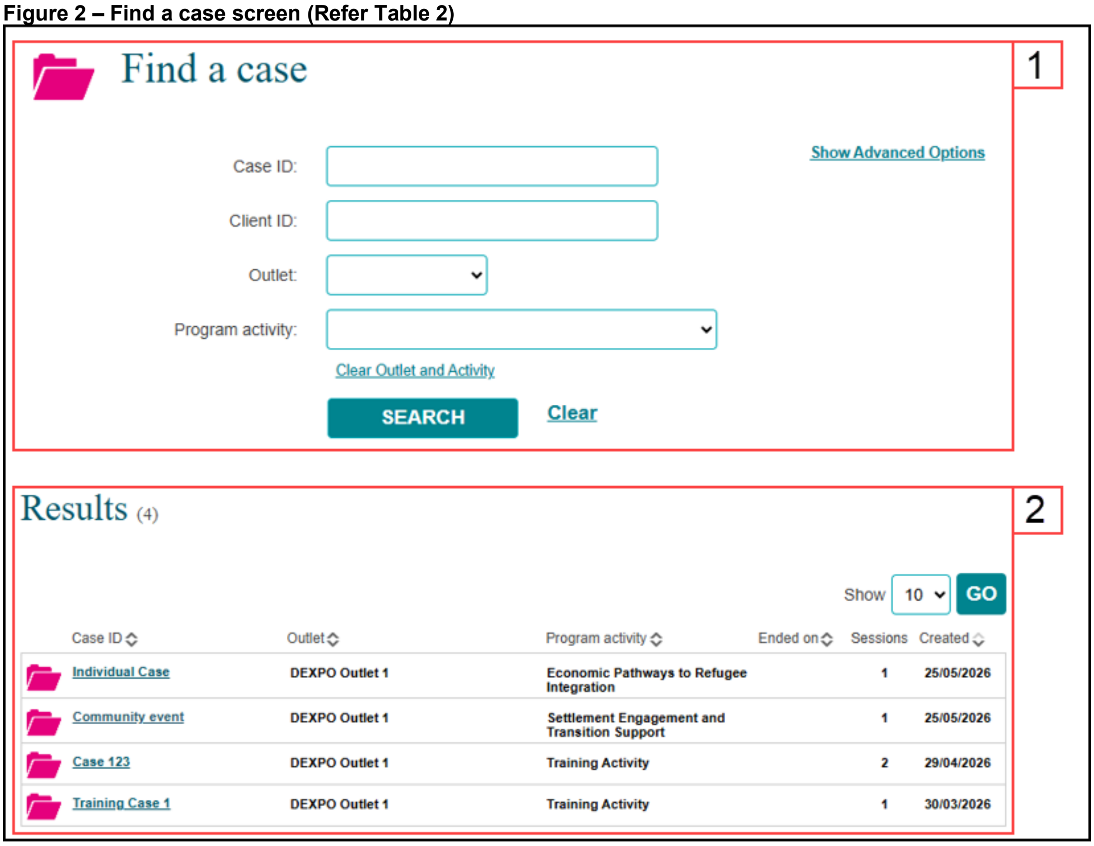


The **Find a case** screen will display. Refer Figure 2.

Find your case by either using the:

1. Typing in the fields in the search area
2. Selecting from the Results section

Figure 2 – Find a case screen (Refer Table 2)



Search area fields

Searching for a case using the **Search area** fields will only display current cases. More information on the **Search area** fields can be found in Table 2.

Table 2 – Find a case search area fields (Refer Figure 2)

FIELD	DESCRIPTION
Case ID	Enter either the partial or full Case ID.
Client ID	Enter the Client ID of a client you know is associated with the case.
Outlet	Select the outlet from the drop down list, where the case is delivered from.
Program activity	Select the program activity from the drop down list the case is associated with.
Show Advanced Options hyperlink	Select the hyperlink to expand the advanced search options.

Selecting the **Show Advanced Options** hyperlink will display the following search options. Cases that have been 'closed' will only display if you use the **End from** search field. Refer toFigure 3.

More information on the **Show advanced options** fields can be found in Table 3.

Figure 3 – Find a case – Show advanced options (Refer Table 3)

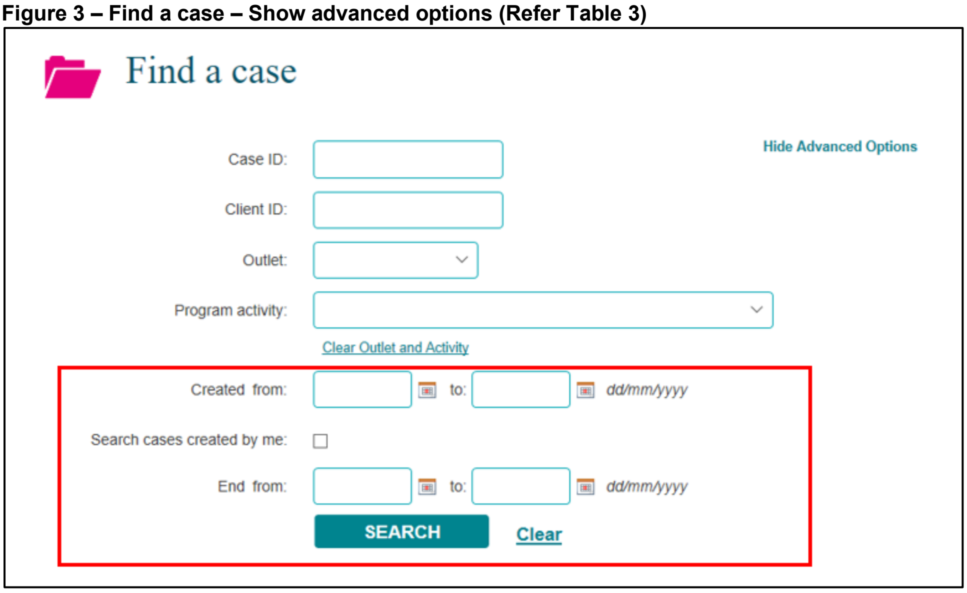


Table 3 – Show advanced options search fields (Refer Figure 3)

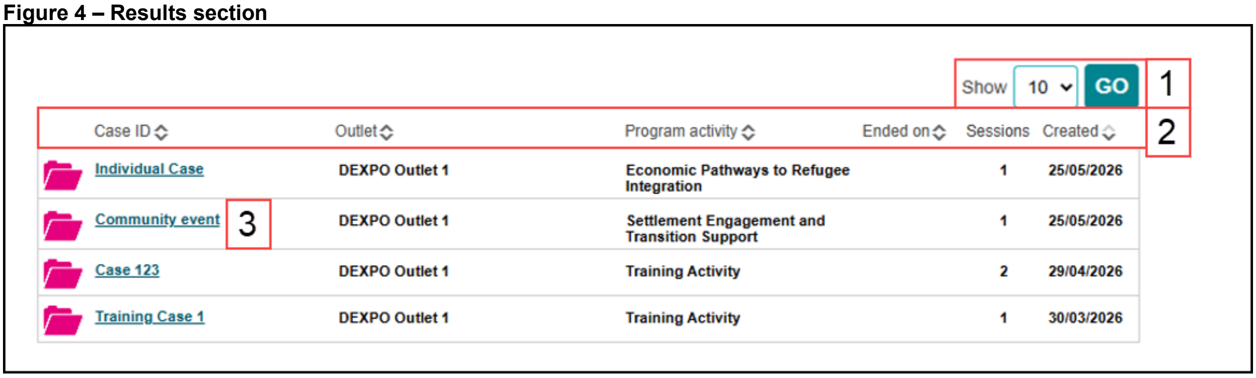
FIELD	DESCRIPTION
Created from	Enter to and from dates to search for open and closed cases.
Search cases created by me	Tick the check box to search for cases created by you.
End from	Enter to and from dates to only search for cases that have been closed.
Hide Advanced Options hyperlink	Select the hyperlink to collapse the advanced search options.

Results section

The most recently created cases will display in the **Results** section. Refer to Figure 4.

1. Select **GO** to change the amount of records displayed on the screen. The options are 10, 20 and 50.
2. Click on the heading hyperlinks of Case ID, Outlet, etc. to filter columns from ascending to descending order and visa-versa either alphabetically or numerically.
3. Click on the case hyperlink to select the case.

Figure 4 – Results section



Select the relevant case hyperlink and the **Case details** screen will display. Refer to Figure 5 and Table 4.

Figure 5 – Case details screen (Refer Table 4)

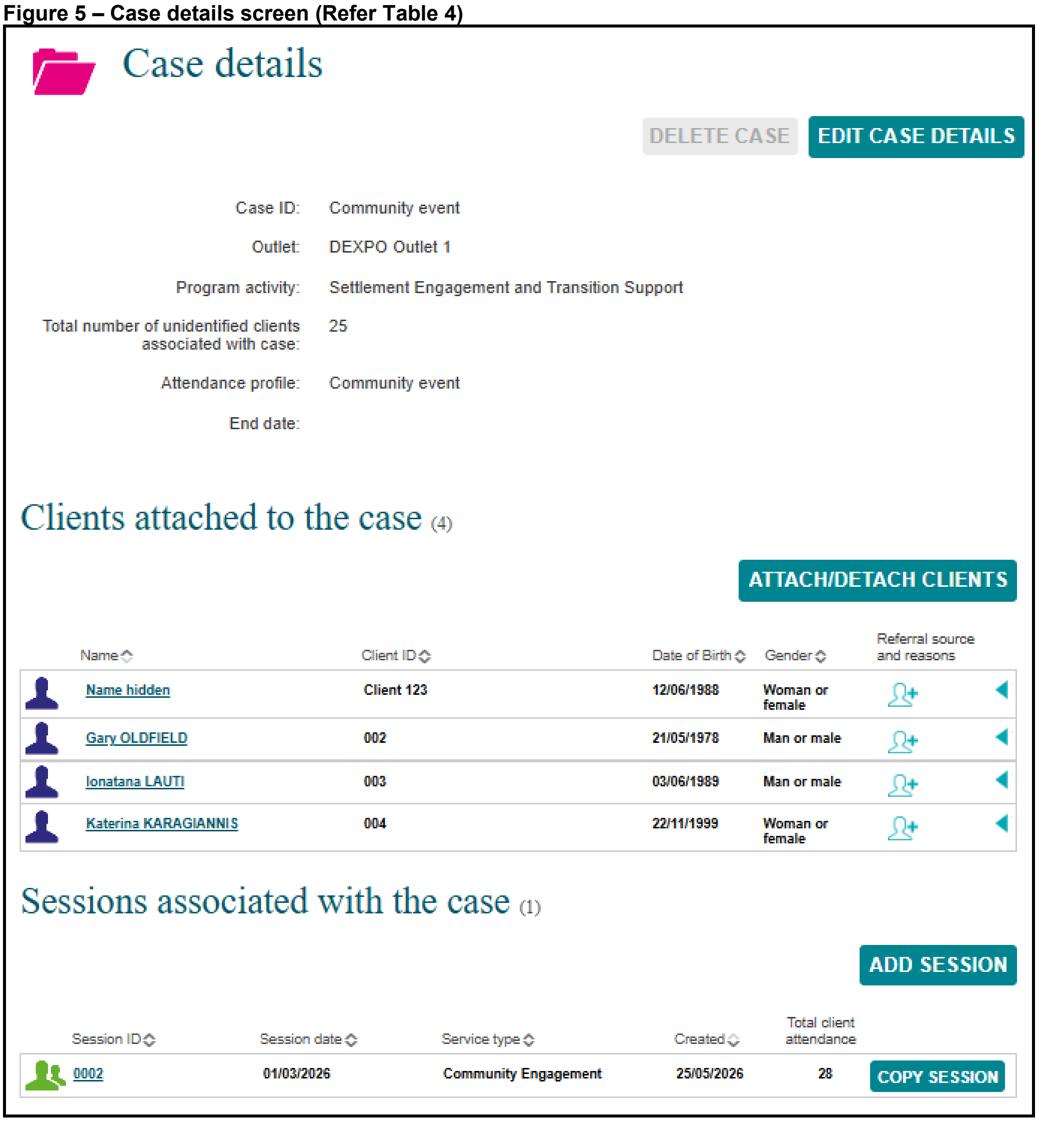


Table 4 – Case details screen (Refer Figure 5)

FIELD	DESCRIPTION
Case details section	Displays case ID, outlet, program activity, etc. associated with the case. Select the EDIT CASE DETAILS button to amend this information. Select the DELETE CASE button to delete the case. A case can only be deleted if there are no sessions attached to it. **Note:** The use of Special characters such as * & % # @ should **not** be included in the free text fields as they are used as search functions in the Data Exchange.
Clients attached to the case	Displays the clients attached to the case. Select the ATTACH/DETACH CLIENTS button to add or remove clients to the case. Select the **Referral source and reasons** icon to add referral source and reasons for an individual client. Refer to the Add a case task card for more information. Select the **expand** button to view the client's referral source and reasons.
Sessions associated with the case	Displays the sessions attached to the case. Select the +ADD SESSION button to add a new session to the case. Select the COPY SESSION button to copy an existing session to the case. Select the **Session ID** hyperlink to amend the session ID to display the Session details screen, Referrals to other services and Client SCOREs icons. Select the column headings such as **Session ID**, **Session date**, to filter columns from ascending to descending order and visa-versa either alphabetically or numerically. Refer to the Add a session task card for more information.
Back button	Select the **<BACK** button to go back to the **Find a case** screen.

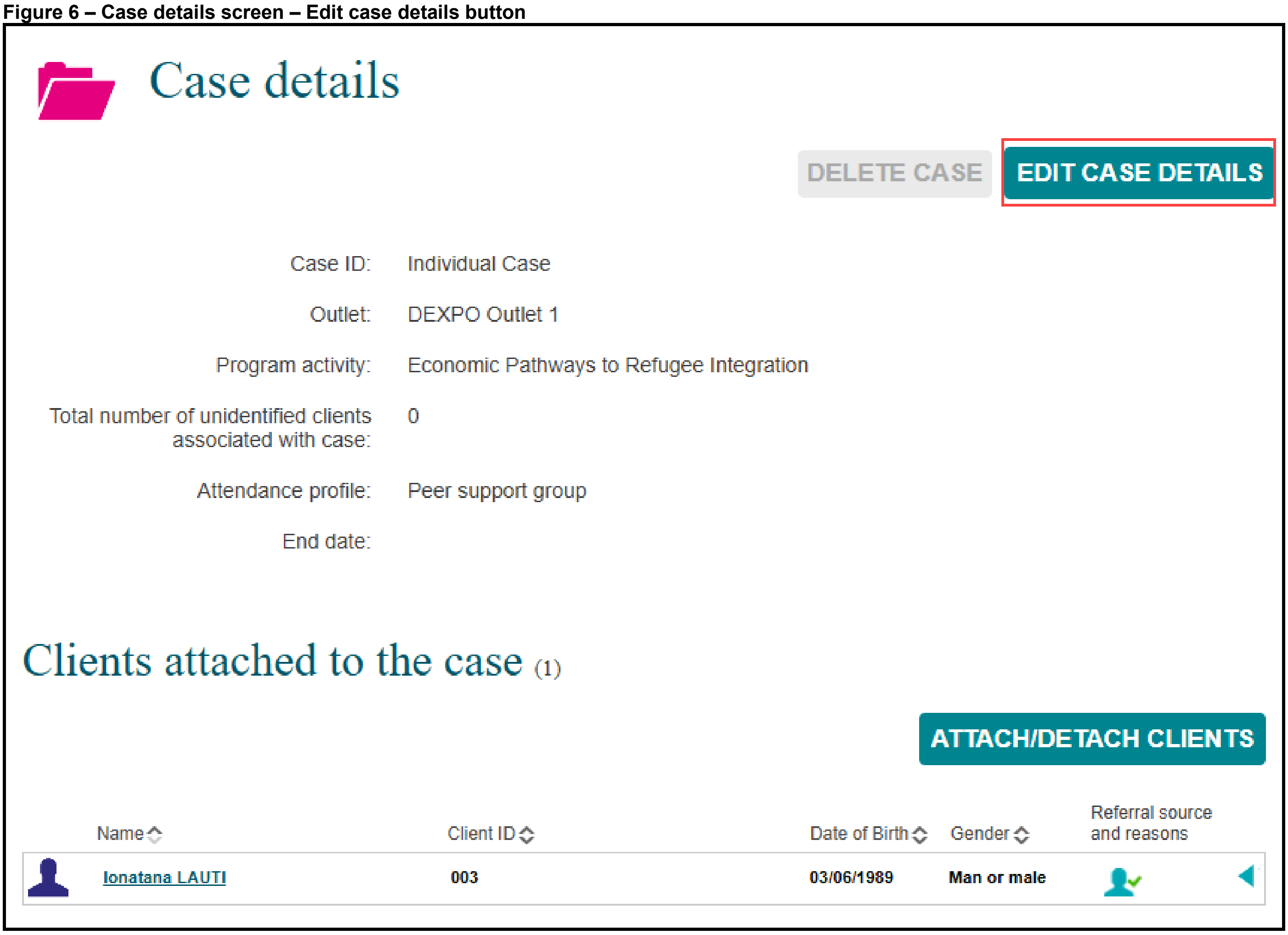
Ending a case

A case can be closed or ended at any time. A case can only be ended on the actual date required and not a date in the future. An ended case can be reopened at any time.

Refer to the Find a case instructions found in this task card.

Once you have found and selected the hyperlink to the relevant case the **Case details** screen will display. Refer to Figure 6.

Figure 6 – Case details screen – Edit case details button

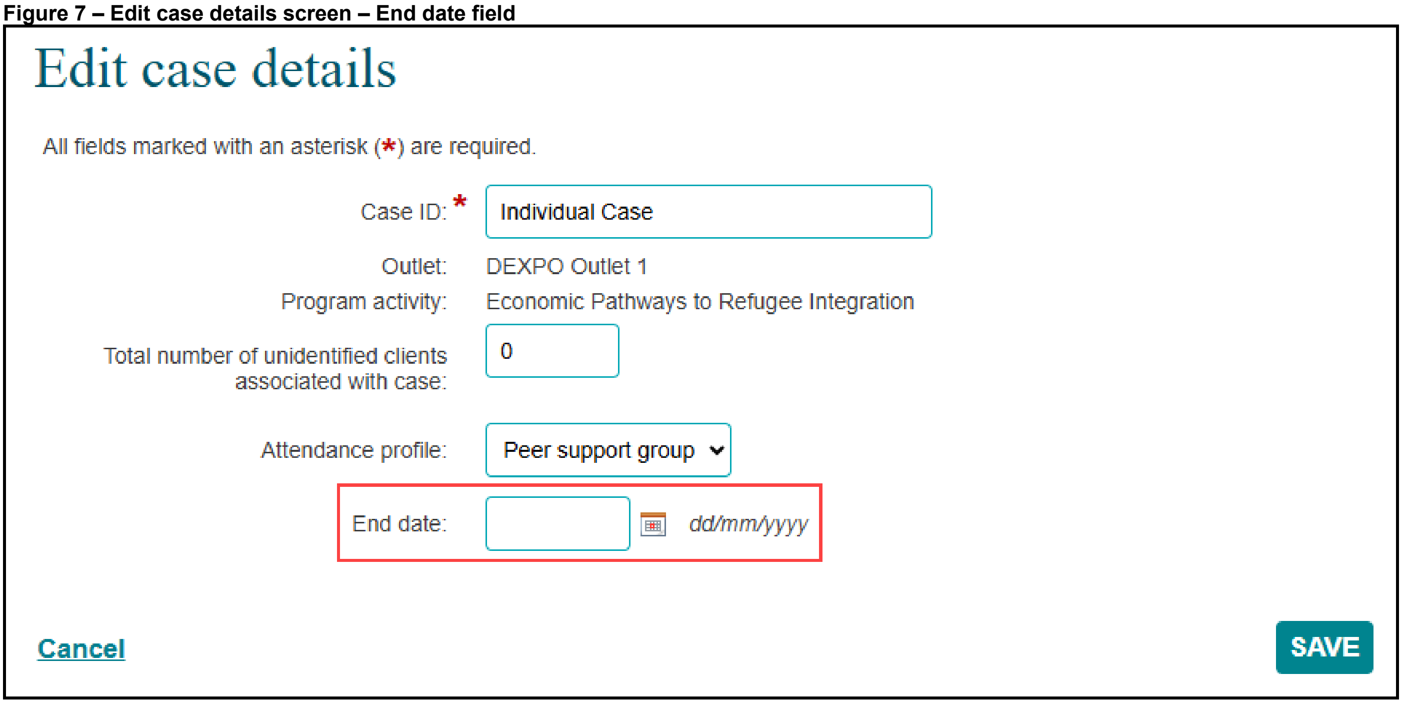


Select **EDIT CASE DETAILS**.

The **Edit case details** screen will display. Refer to Figure 7.

Enter the **End date** for the case by either typing the date in or using the calendar function.

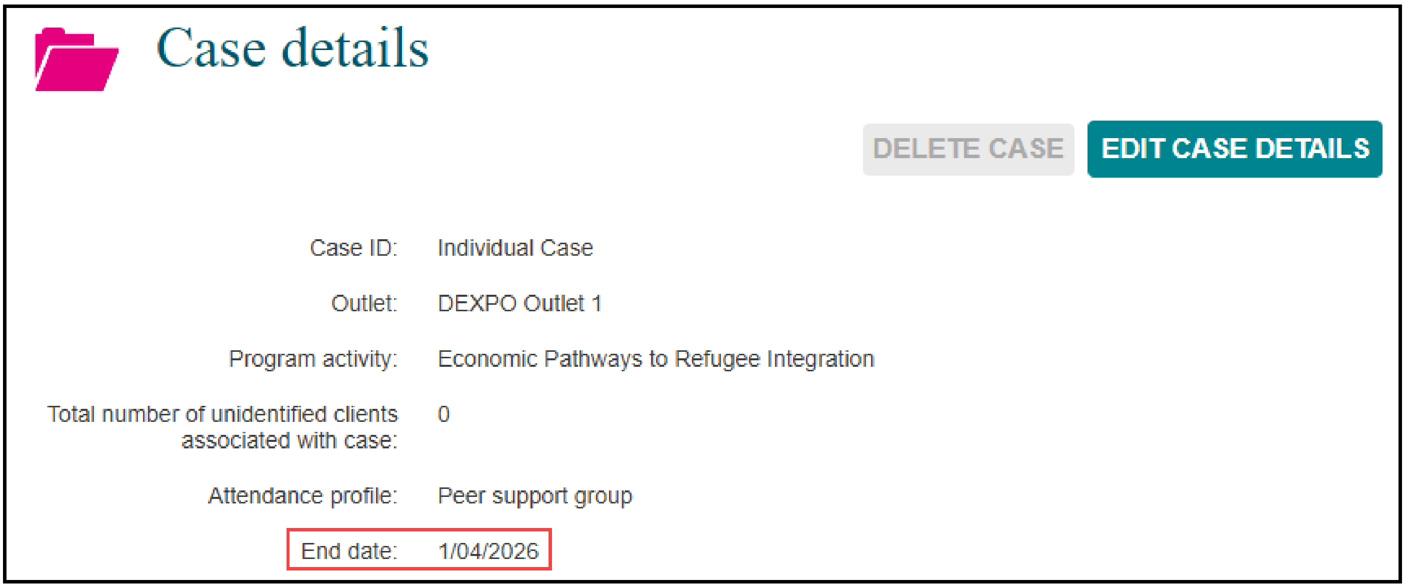
Figure 7 – Edit case details screen – End date field



Select **SAVE**.

The **Case details** screen will display with the **End date** field updated. Refer to Figure 8.

Figure 8 – Edit case details screen – Updated end date field



Sessions conducted can continue to be added to an ended case until the close date. For example, a case that has the end date of 13 August 2026 can have sessions added to it within the relevant reporting period if the sessions occurred either before or on the end date.

You can find more information on outlets, clients, cases, and sessions on the Data Exchange Protocols, and the Training page on the website.

For system support, email the Data Exchange Helpdesk use our online contact form.