



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

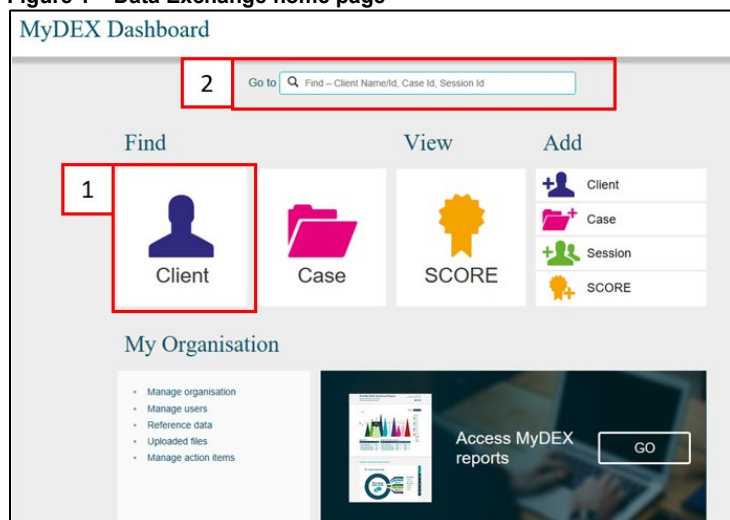
- Do not add any personal information into the Client ID and Tag fields.
- Do not enter a client's full address if it is a sensitive location such as a refuge or shelter.
- Client and consent information is visible to the entire organisation and can be updated at any time.
- If a client does not provide 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 **Find 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

Find a client

Given name:

Family name:

Client ID:

Created from: to: dd/mm/yyyy

Tags: + ADD TO SEARCH

SEARCH Clear

Results (1)

Show 10 GO

Name	Client ID	Date of Birth	Gender	Created	SCORE present
Ruby SOHO	179	11/12/1949	Woman or female	27/05/2026	

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

MyDEX Dashboard

Go to Ruby Soho (179)

Find View Add

Client Case SCORE

+ Client
+ Case
+ Session
+ SCORE

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

Client profile

7 **DELETE CLIENT** **EDIT CLIENT DETAILS** 3

1 **Ruby SOHO**

Client ID: 179
Name provided is a pseudonym: No
Estimated Date of Birth: No
Date of birth: 11/12/1949
Gender: Woman or female
SCORES available: No
Tags **+ ADD** **SAVE TAGS**

2 **MORE v**

VIEW CLIENT SCORE 4

Cases (1) 5

ADD A CASE

Case ID	Outlet	Program activity	Sessions	Created
Tuesdays	CHSP 2025 Onwards	Group social support	1	27/05/2026

Sessions (1) 6

Session ID	Case ID	Session date	Service type	Participation	Created
0001	Tuesdays	01/05/2026	Cultural support	Client	27/05/2026

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

Edit client details

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

Given name: * Ruby

Family name: * Soho

Client ID: * 179

Name provided is a pseudonym: ☐

Estimated Date of Birth: ☐

Date of birth: * 11/12/1949 dd/mm/yyyy

Gender: * Woman or female

Tags **+ ADD**

Consent

Client consents for DSS to collect personal information from providers for storage on 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: * RED HILL

State: * ACT

Postcode: * 2603

Demographic details

Country of birth: * Australia

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

Figure 5 – Edit client details screen (continued)

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)? *

Enter MAC ID: *

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](#)

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