



Update client details

What access do I need?

SP Site role

What else do I need?

You must be linked to the client in the portal.

Client details

From the landing page of the portal, open the **Client** tab. Search for the client. Please see the [search for existing clients](#) and transferring clients guide for assistance.

The client's current details are at the top of the screen. Click **Edit** to update any of the following client's details

- Name
- Date of birth
- Gender
- Title
- Contact number
- Address
- Specialist services (complex status)

If you have updated the client's address you will need to click **Check address** and confirm the correct address. If a practitioner has identified a client requires specialist services, please check the 'Specialist Services' box and follow the guide on [making a client complex in the portal](#).

Click **Save**.

Client's communication preferences

Under the **Client Communications** accordion, you can update the client's correspondence preferences. You can add an email address and alternative contact.

Click **Edit**.

If your client lives in an aged care facility, please check this box.

If your client would like to nominate an alternative contact, please check the box next to 'Does the client have an alternative contact'. You will need to enter in the alternative contact's details.

You can choose whether to send information to the client only, the alternate contact only, or to both.

You can also add an email address for the client by selecting Send correspondence to the client to Via Email.

You can also specify a different postal address for the client, if relevant. To do so, untick the Postal Address same as residential box and fill in the details. Click **Check address** and confirm the correct address.

Click **Save**.

Deceased clients

If your client has passed away, you can update the portal under **Change Client Status**. Click **Edit**, and in the drop down Action menu choose Cancelled client – deceased.

You will need to add a Reason For Action, such as "client's family advised" and today's date. Click **Save** to finalise the changes.