



Link, transfer and search for existing clients

What access do I need?

SP Site or SP Claims role

What else do I need?

For a transfer, you will need a client consent form signed by the client or a power of attorney. Keep this on the client file.

Getting to the search page

The screenshot shows the portal interface with two main tabs: "For Everyone" and "For Professionals". Below the tabs is a "Home" link. A "Client" dropdown menu is open, showing an "Apply for Program" button and a prominent "Find a client or applicant" button. Below this is a search form with the following fields:

- Eligibility Number/ Voucher Number:
- Given Name:
- Family Name:
- Date of Birth:

Log onto the portal. From the landing page, open the **Client** tab. You can search here for linked and unlinked clients **Find a client or applicant**

Are you on the website or portal?

Make sure you get to the application form through the portal landing page, rather than the public area of the website. You won't be able to transfer or manage client details from the website.

Not linked to the client yet?

You'll need to enter four points of ID for the client

- eligibility number or voucher number
- first name,
- last name, and
- date of birth.

These must all match the details in the portal **exactly** to find the client

Is the client linked to you already?

If you're already currently linked, you only need one point of identification (ID) to locate the client.

Tip for searching with a voucher number

If you're using a voucher number to search for a client, make sure you include a hyphen (-) after the voucher number.

Finishing the search

Click the **Find** button to search. If the criteria matches one client, and they are not linked to you, you will be taken to the client consent screen. If the client is linked to you, you will be taken to the client details screen. If your search criteria matches multiple clients, you will be taken to a list of records that match. Click on the surname to go to the client consent or client details screen.

Getting a "Can't find a match" error?

- Reconfirm the details with the client – they must match Centrelink/DVA exactly
- If already linked, try searching using only a first or last name, or eligibility number
- Make sure they are in the correct fields and triple check for spelling errors!
- Try all four points of ID in case the client isn't currently linked to you. If this is the case, you will need to confirm the client's consent to transfer again and keep the written consent on file.