



Viewing, Recording and Updating a Person's Details

OVERVIEW

This User Guide details how to view records and update a Person's details.

HINTS & TIPS

A Person's details will change over time.

Please ensure a Person's details are updated as information becomes available and known.

1. NAVIGATE TO PERSON DETAILS SCREEN:

Navigate to the client's **Person View**.

Click on **View Person Details** link in the Person View.

Person Details screen displays. This is where you can create or update the Client's personal details; Add or Update Address; Phone Numbers and Email Addresses.

Note - If you are an Intensive Case Management worker, there will be an **Assist Person ID** field displayed in the Person Details screen. The field is not visible to workers that are not Intensive Case Management workers.

The field is read-only – The Assist Person ID is recorded by the Child Protection Leader from CPFS.

Person Details

[Save](#) | [Go to Person View](#)

<p>Person ID 480563 Surname TESTING Forename Mel Date of Birth(K) 9/9/2005 Age 14 Y 11 M Interpreter</p>	<p>Address Phone Number Gender Female Aboriginal Not Recorded CaLD Not Recorded</p>
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Person Information

Prefix <input type="text"/>	Complete Meets Criteria More Names
*Forename <input type="text" value="Mel"/>	Assist Person ID 123456
*Surname <input type="text" value="TESTING"/>	Middle Name <input type="text"/>
	Gender <input type="text" value="Female"/>

Date of Birth Information

Type	Date	Year(s)	Month(s)		
Actual DOB <input type="text"/>	09/09/2005 <input type="text"/>	14	11	<input type="text" value="+"/>	<input type="text" value="-"/>



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2. ADDING NAMES TO CLIENT:

In the **Person Details** view, to add names to an existing person, select the **More Names** link.

Person Information

Prefix

*Forename

*Surname

Complete Meets Criteria

Assist Person ID 123456

Middle Name

Gender

Select the **Add New Name** button.

Person Details

Edit name for Mel TESTING

Person Names

Primary	Name	Name Type	
<input checked="" type="checkbox"/>	TESTING,Mel	Preferred	<input type="button" value="Edit"/>

Complete the following:

- **Name Type**
- **Prefix**
- Enter a **First Name**, **Last Name** and **Middle Name** where applicable

Click **OK**

Person Details

Add Name for Mel TESTING

Name Information

*Name Type

Prefix

*First Name Middle

*Last Name

[Return to Person Name Summary](#)

* Required Field

Check the box for the **Primary** name of the client.

To edit either name, click on the **Edit Button**.

If you are finished click **OK**.

Person Details

Edit name for Mel TESTING

Person Names

Primary	Name	Name Type	
<input type="checkbox"/>	TESTING,Mel	Preferred	<input type="button" value="Edit"/>
<input checked="" type="checkbox"/>	SMITH,Mel	Maiden	<input type="button" value="Edit"/>



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3. DATE OF BIRTH / IDENTITY AND CULTURE / LANGUAGE / ETHNICITY:

The following can be entered and/or updated in the Person Details screen:

- Date of Birth
- Identity and Culture
- Language
- Ethnicity

Date of Birth Information

Type	Date	Year(s)	Month(s)		
Actual DOB	09/09/2005	14	11	+	-

Identity and Culture

Country of Birth:

*Aboriginal: *CaLD:

* In this context the term Aboriginal is inclusive of TSI

Language

Language	Primary	Interpreter Required		
<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	+	-

Ethnicity

4. ADDING AN ADDRESS:

If a client does not have an address recorded, then select the **Add New Address** button.

Address Summary

There is currently no Address information for this Person Details

Add New Address

In the **Add Address** screen, complete the details for the Address.

Select the **Search Existing Address** button when criteria entered and select an address.

If search results return no matching address then select the Return button, then **Save**.

Person Details
Add Address

Address Information

*Country:

Address 1:

Address 2:

Town / Suburb:

*State:

Post Code: **Search Existing Address**

Start Date:

[Return to Address Summary Page](#)

* Required Field

Address Search Result List

Search Results

Select

Address

Select

189 ROYAL STREET, EAST PERTH, 6004, WA, AUS

Return



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5. UPDATING AN ADDRESS:

If a client has an address recorded and needs to be updated, select the **Update** button to record a new address.

Address Summary

Primary	Address	Start Date	End Date	Update
<input checked="" type="checkbox"/>	189 Royal Street, East Perth, WA, 6004, AUS	15/07/2020		Update

Select **Correct this person's address** to enable the screen.

Complete the fields with the required address.

Ensure that the correct start date of the address has been recorded, then select **Search Existing Address** button.

Person Details
Update Address

Address Information

*Country Australia
Address 1 189 Royal Street
Address 2
Town / Suburb Perth
*State WA Western Australia **Correct this person's address**
Post Code 6004

Start Date 17/08/2020

[Return to Address Summary Page](#)

* Required Field

Person Details
Update Address

Address Information

*Country Australia
Address 1 52 AMBERTON AVENUE
Address 2
Town / Suburb GIRRAWHEEN
*State WA Western Australia **Search Existing Address**
Post Code 6064

Start Date 17/08/2020

Save [Return to Address Summary Page](#)

* Required Field

If the required address is available within the Search Results, click the **Select** button next to the address.

If the correct address does not display, then choose the **Return** button.

Click **Save** in the **Update Address** screen.

Address Search Result List

Search Results

Select	Address
Select	52 AMBERTON AVENUE, GIRRAWHEEN, WA, 6064, AUS

Return

Person Details
Update Address

Address Information

*Country Australia
Address 1 52 AMBERTON AVENUE
Address 2
Town / Suburb GIRRAWHEEN
*State WA Western Australia
Post Code 6064

Start Date 17/08/2020

Save [Return to Address Summary Page](#)

* Required Field

6. ADDING A PHONE NUMBER:

In the Person Details screen, in the Phone Summary section click on the **Add Phone** button.

Complete the required fields, then **OK**.

The phone number will now display in the **Person Details** page.

Note: if you enter multiple phone numbers, select a Primary **Phone Number** by checking the primary box, then **SAVE**.

Primary	Phone Number	Purpose	Start Date	End Date	
<input checked="" type="checkbox"/>	0411 100 111	Home	17/08/2020		<input type="button" value="Update"/>

7. ADDING AN EMAIL ADDRESS:

In the Person Details screen, in the Email Summary section click on the **Add Email** button.

Complete the required fields, then **OK**.

The email address will now display in the **Person Details** page.

Note: if you enter multiple email addresses, select a Primary **Email** by checking the primary box, then **SAVE**.

Primary	Email Address	Purpose	Start Date	End Date	
<input checked="" type="checkbox"/>	mel@hotmail.com	Home	17/08/2020		<input type="button" value="Update"/>