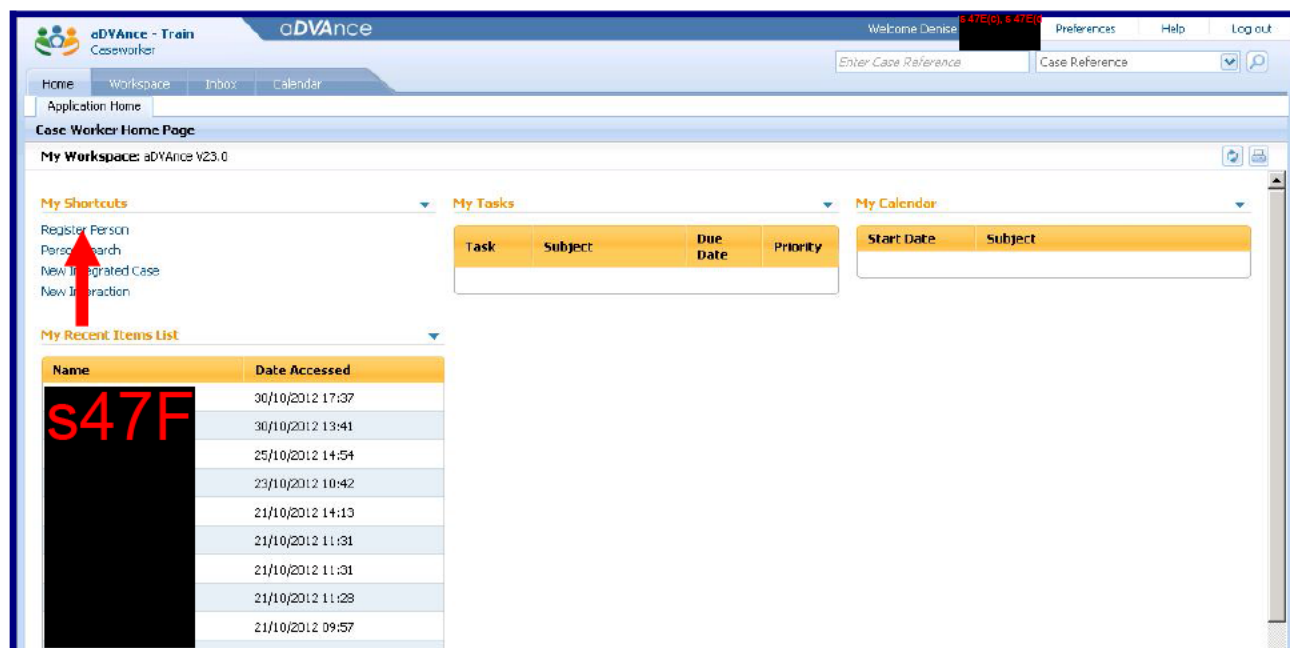


[aDVance Version 6 Upgrade – PRS Registration Guide](#)

This guide is designed to assist Registration Officers understand the changes to Client Registration under the Cúram Version 6 upgrade.

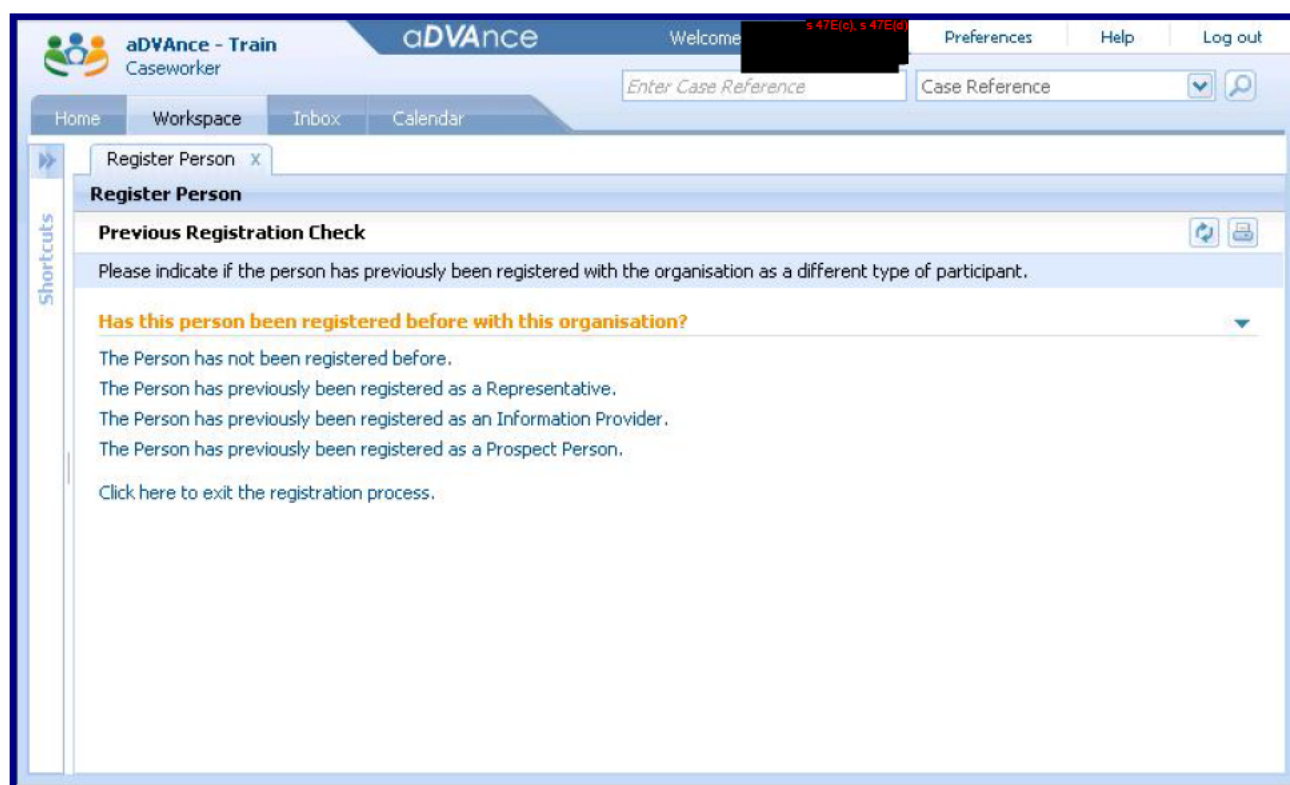
[Daily Housekeeping:](#)

It is recommended that Registration staff spend one minute each morning to set up their aDVance Workspace to their advantage.



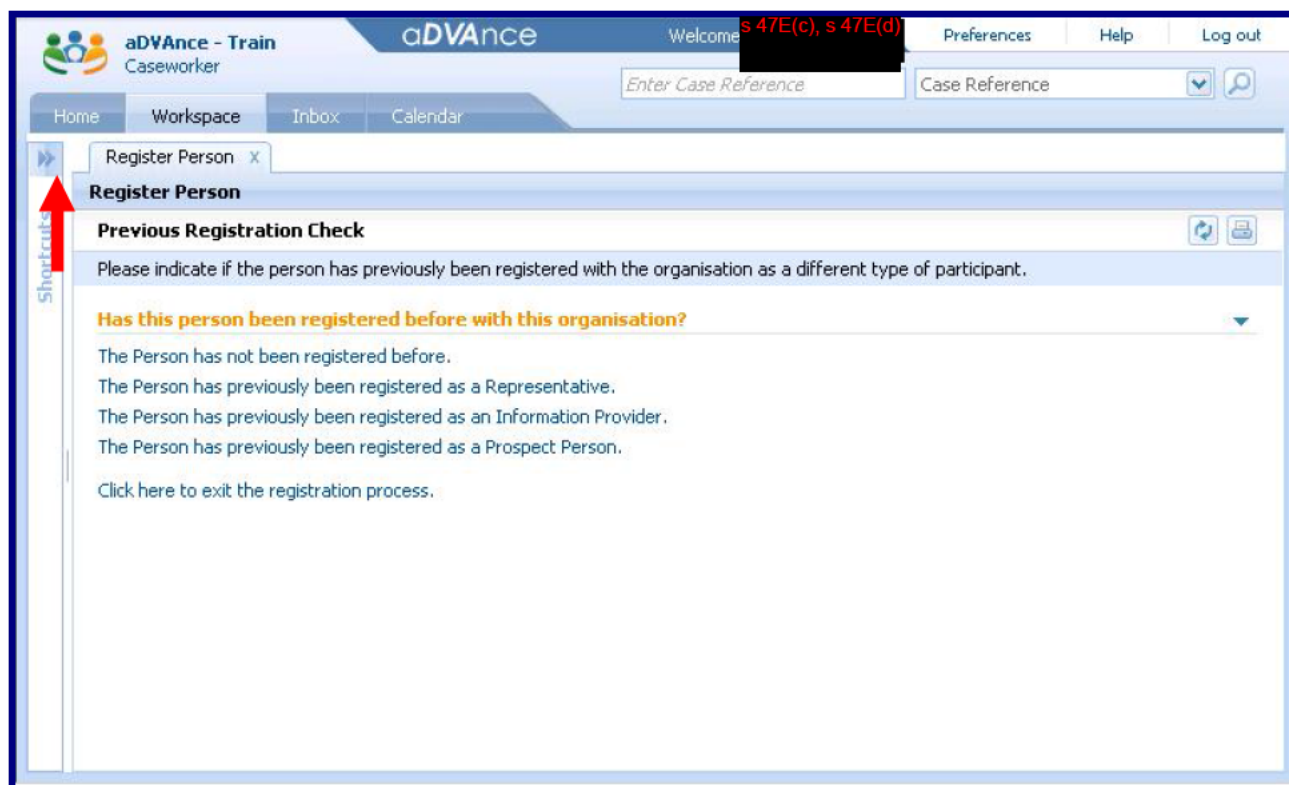
[Step 1](#) – On your Application Home screen click **Register Person**.

The Register Person tab opens within your Workspace.

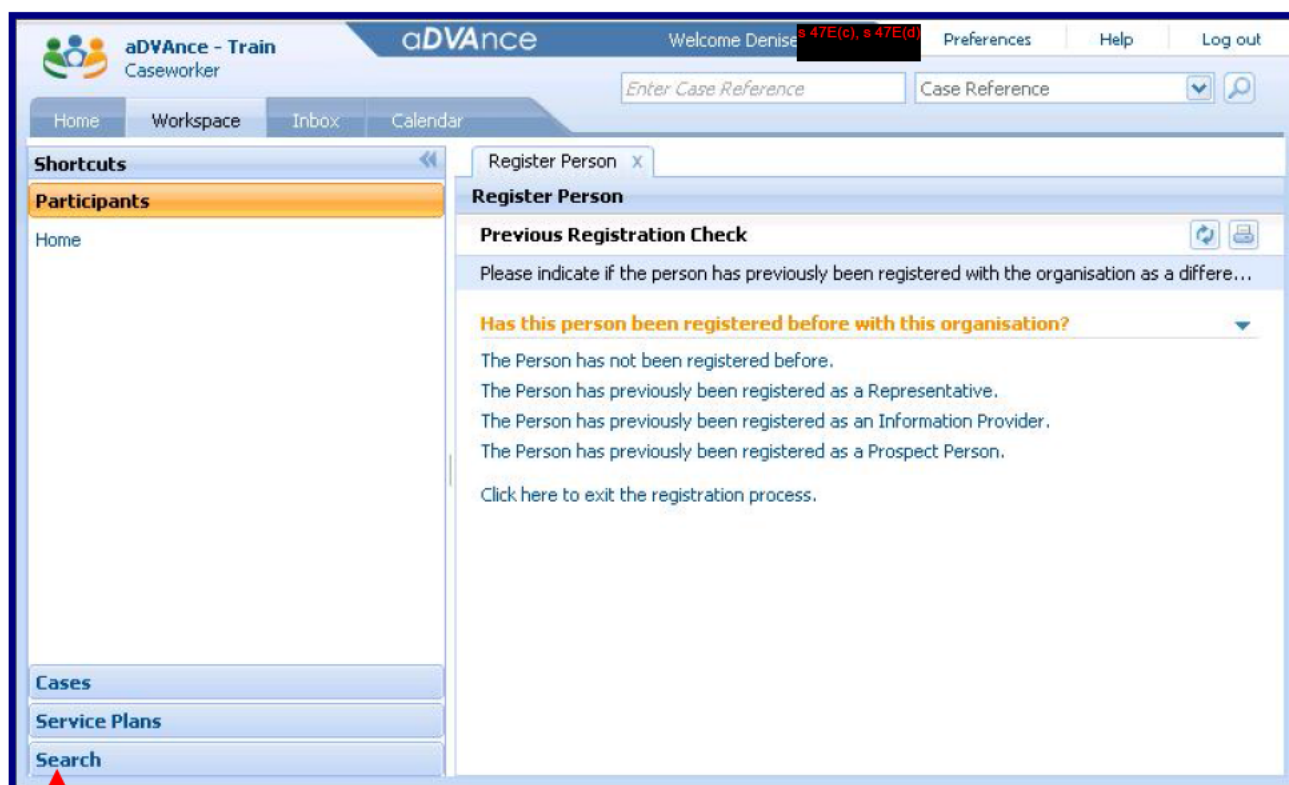



[aDVance Version 6 Upgrade – PRS Registration Guide](#)

Step 2 – Access the Prospect Search tab

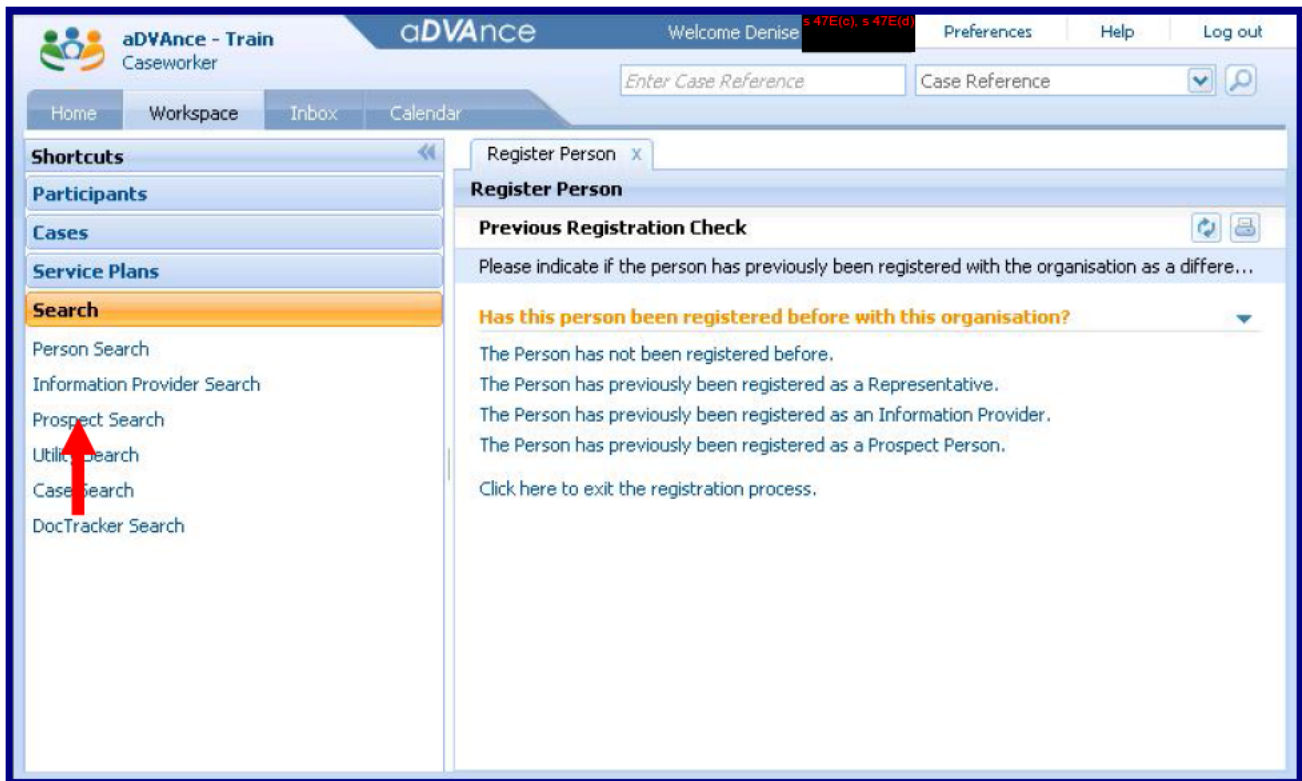


To access Prospect Search click  in the Shortcuts panel on the left.



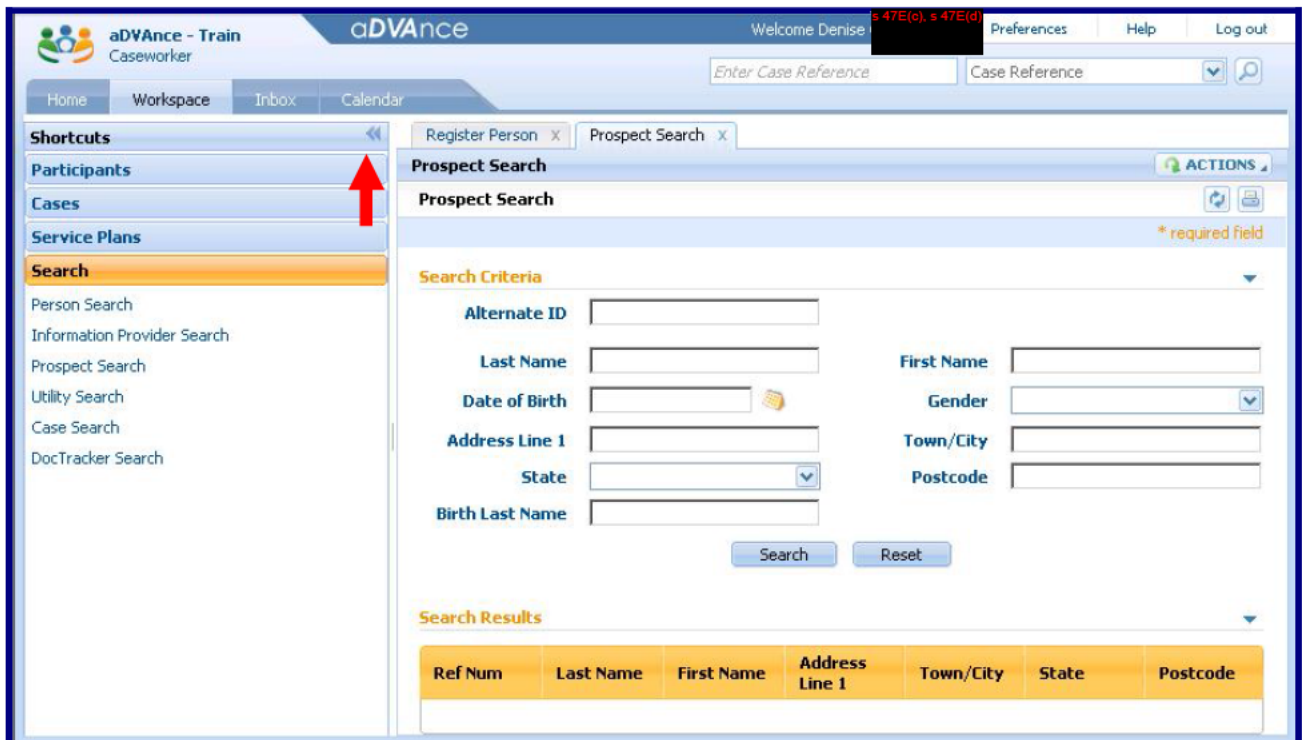
Click  at the bottom of the Shortcuts panel.


[aDVance Version 6 Upgrade – PRS Registration Guide](#)



From the Search Shortcuts menu click “**Prospect Person**”.

The Prospect Search screen opens in a new tab.



Click  to close the Shortcuts panel.

aDVance Version 6 Upgrade – PRS Registration Guide

The screenshot shows the aDVance Train Caseworker interface. The top navigation bar includes the logo, user name 'Denise', and links for 'Preferences', 'Help', and 'Log out'. Below the navigation bar are tabs for 'Home', 'Workspace', 'Inbox', and 'Calendar'. The main content area is titled 'Prospect Search' and contains a search form with the following fields: Alternate ID, Last Name, Date of Birth, Address Line 1, State, Birth Last Name, First Name, Gender, Town/City, and Postcode. A red arrow points to the 'Register Person' tab in the top navigation bar. Below the search form is a 'Search Results' table with columns: Ref Num, Last Name, First Name, Address Line 1, Town/City, State, and Postcode.

Access the Register Person tab.

The screenshot shows the aDVance Train Caseworker interface with the 'Register Person' tab selected. The main content area is titled 'Register Person' and contains a 'Previous Registration Check' section. The text reads: 'Please indicate if the person has previously been registered with the organisation as a different type of participant.' Below this is a dropdown menu with the following options: 'The Person has not been registered before.', 'The Person has previously been registered as a Representative.', 'The Person has previously been registered as an Information Provider.', and 'The Person has previously been registered as a Prospect Person.' There is also a link that says 'Click here to exit the registration process.'

Your Workspace is set to streamline your client registration work.

After each client registration close all the client tabs to return to your Workspace with just Register Person and Prospect Search tabs open.

aDVance Version 6 Upgrade – PRS Registration Guide

aDVance Prospects:

Prospects are registered in aDVance in the following circumstances:

- ❖ Where OBAS conduct the initial On Base interview the Serving Member completes an OBAS Authority form which contains the member's personal details (Name, Address, Date of Birth, Telephone Number, Email Address, PMKeys Number and their Unit).

The OBAS Authority form is the Serving Member's consent for DVA to collect, store and use their personal information.

The OBAS officer registers the Serving Member as a Prospect using the information provided on the OBAS Authority form.

OBAS then record the initial and subsequent On Base interviews with the Serving Member as aDVance communications on their Prospect record.

- ❖ Where VAN receive a request for DVA Claim Forms or other material from an unregistered person they register the person as a Prospect and record the request as an aDVance communication on the Prospect's record.

VAN have no legal authority to request an unregistered client's Date of Birth so a Prospect created by a VAN officer does not have a Date of Birth recorded.

Particularly from the OBAS perspective the Prospect record can build a detailed client profile from the initial contact with DVA and may contain critical information and evidence to assist decision makers when the Prospect lodges a claim form.

It is anticipated that the number of current Serving Members being registered as Prospects by both OBAS and VAN will significantly increase with the withdrawal of troops from Afghanistan.

Prospect Search:

When receiving claim forms from "cleanskin" currently unregistered clients the Prospect Search is a critical component of the PRS Registration process.

aDVance Version 6 Upgrade – PRS Registration Guide

PRS Registration – Worked Example 1:

Claim received **s 47F** [REDACTED] for veteran, spouse & child

Veteran:
Address:
Residential Phone:
Warcode:

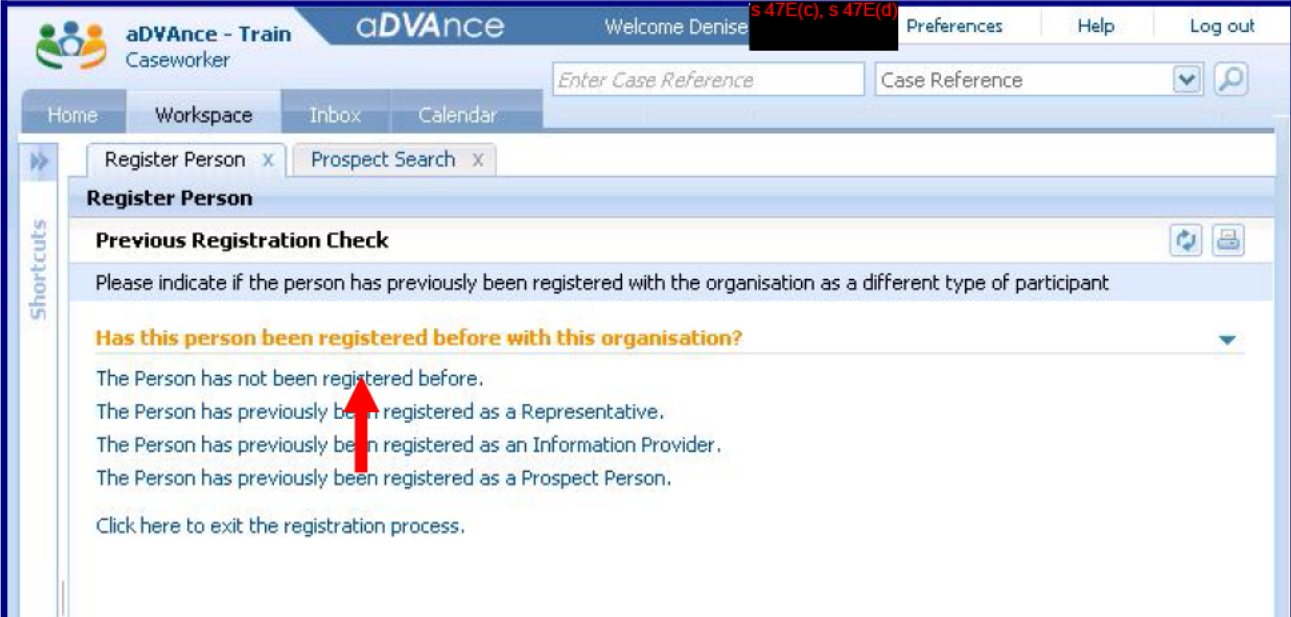
Spouse:
Address:
Residential Phone:
Marriage Date:

Child:
Address:



Step 1 – Registration of the Veteran

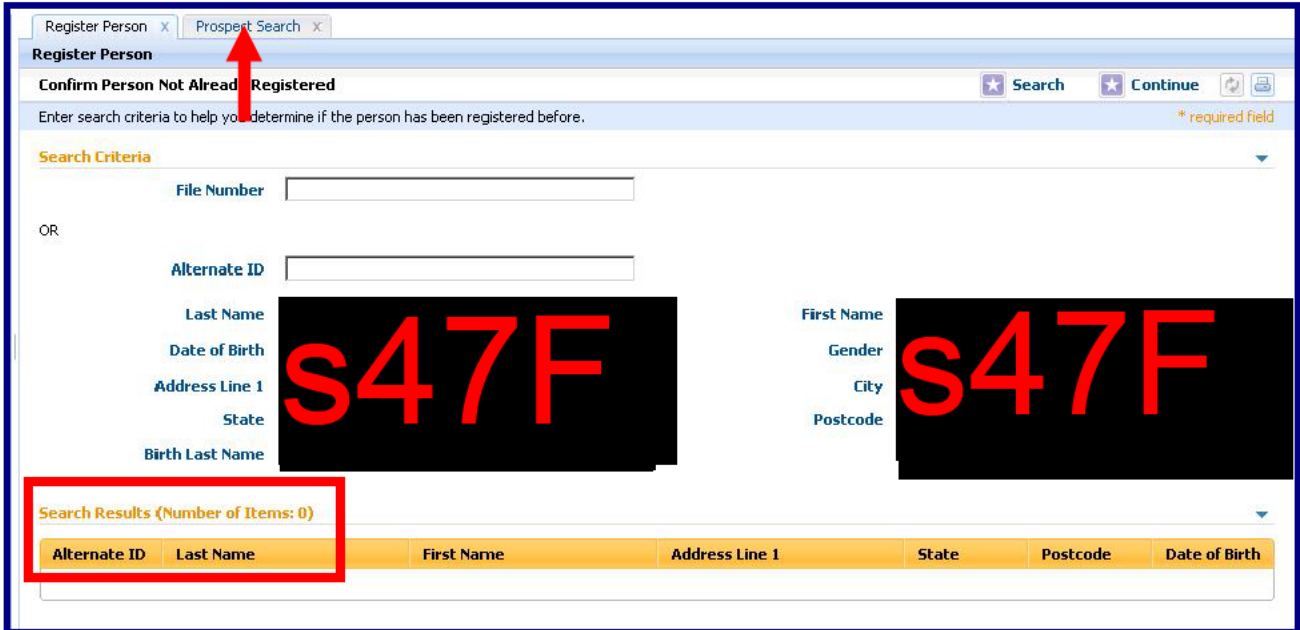
Access your Workspace tab – which you set up earlier.



Click the **“The Person has not been registered before.”** option.





aDVance Version 6 Upgrade – PRS Registration Guide

Perform a Person Search for the Veteran – enter the veteran’s personal details and click .



Register Person x Prospect Search x

Register Person

Confirm Person Not Already Registered    

Enter search criteria to help you determine if the person has been registered before. * required field

Search Criteria

File Number

OR

Alternate ID

Last Name

Date of Birth

Address Line 1

State

Birth Last Name

First Name

Gender


City

Postcode

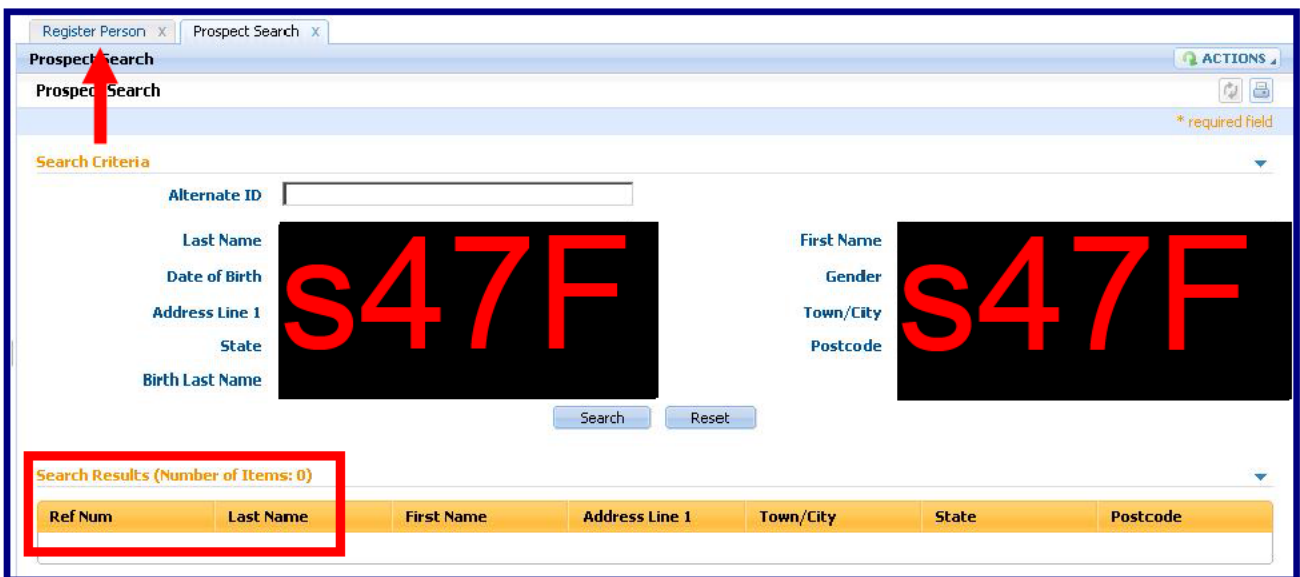
Search Results (Number of Items: 0)

Alternate ID	Last Name	First Name	Address Line 1	State	Postcode	Date of Birth
--------------	-----------	------------	----------------	-------	----------	---------------


Following an unsuccessful search access the Prospect Search tab.



Perform a Prospect Search for the Veteran – enter the veteran’s Name and Gender and click .

Important Note: Do not use Date of Birth during the Prospect Search – Prospects registered by VAN will not have a Date of Birth recorded. Using Date of Birth for a VAN Prospect can produce a false negative search result.



Register Person x Prospect Search x

Prospect Search 

Prospect Search  

Enter search criteria to help you determine if the person has been registered before. * required field

Search Criteria

Alternate ID

Last Name

Date of Birth

Address Line 1

State

Birth Last Name

First Name

Gender

Town/City

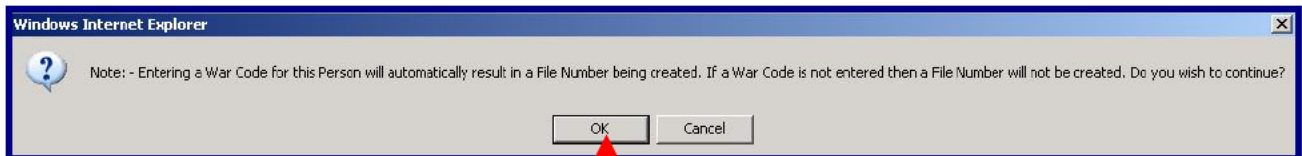
Postcode

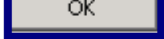
Search Results (Number of Items: 0)

Ref Num	Last Name	First Name	Address Line 1	Town/City	State	Postcode
---------	-----------	------------	----------------	-----------	-------	----------

Following an unsuccessful search access the Register Person tab.

aDVance Version 6 Upgrade – PRS Registration Guide



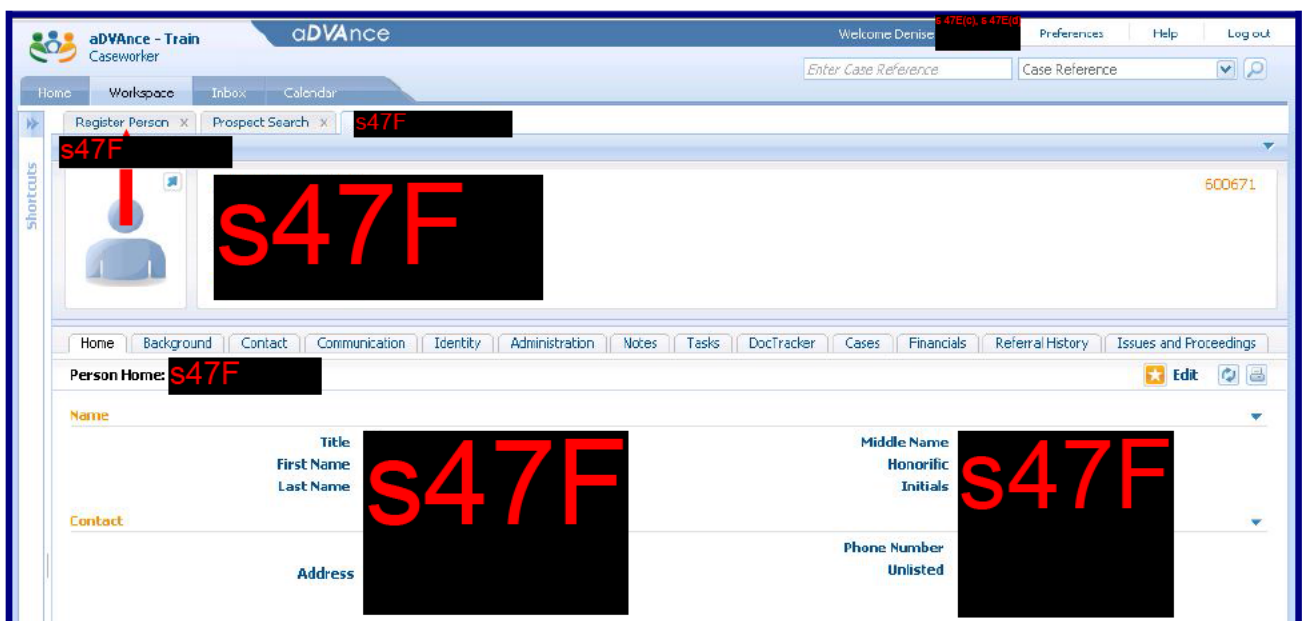
The War Code warning message appears – click .

The Veteran has been registered – record the DVA File Number.



Click the "**Click here to open the person home page**" link.

The veteran's Home Page opens in a new tab.



Return to the Register Person tab.

aDVance Version 6 Upgrade – PRS Registration Guide

Step 2 – Registration of the Spouse

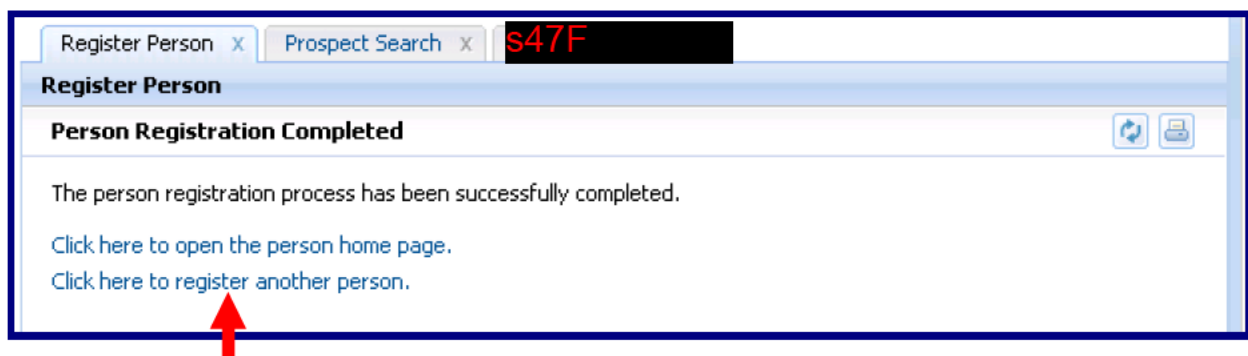


Click the “**Click here to register another person**” link.

Repeat the process to register the spouse.

The screenshot shows the 'Enter Person's Registration Details' form. The form is divided into several sections: 'Name', 'Details', and 'Correspondence Address'. The 'Name' section includes fields for Last Name, Middle Name, Honoric, Gender, First Name, Title, Birth Last Name, and Initials. The 'Details' section includes Date of Birth, Registration Date, Preferred Language, Preferred Communication, and Preferred Office. The 'Correspondence Address' section includes a field for Correspondence Address. A large red 's47F' watermark is overlaid on the form. A red arrow points to the 'Register' button in the top right corner of the form.

Carefully check all details and then click **Register**.

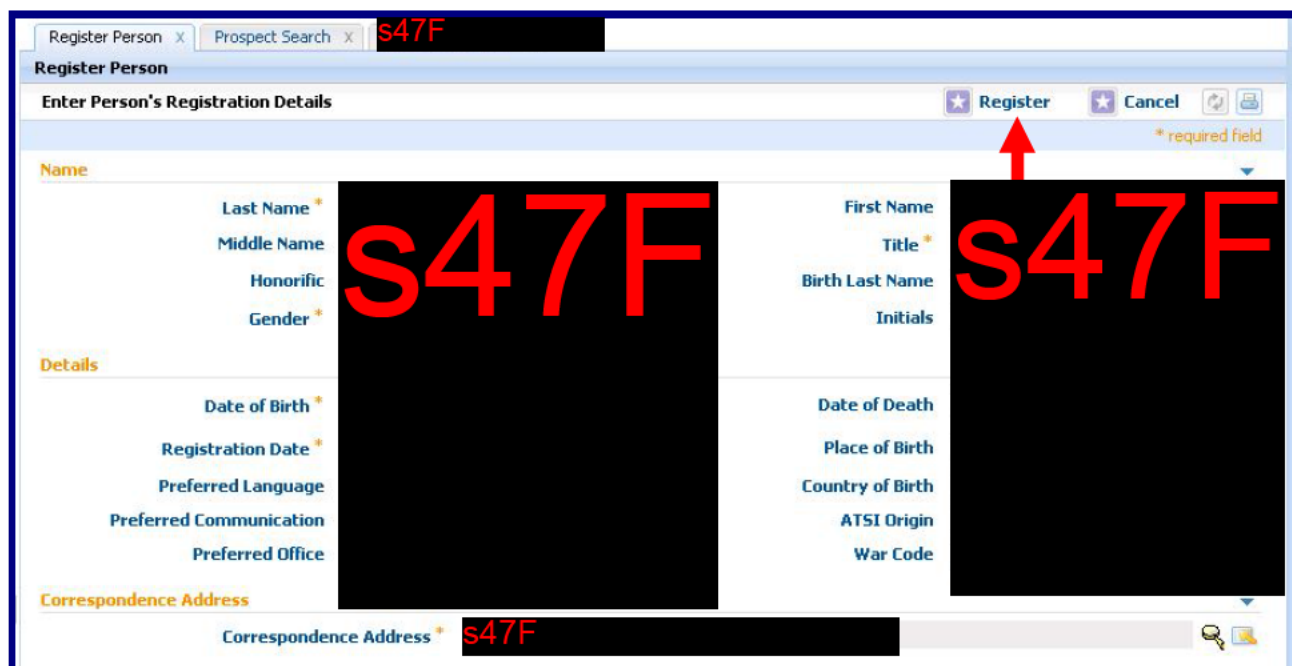


Click the “**Click here to register another person**” link.

aDVance Version 6 Upgrade – PRS Registration Guide

Step 3 – Registration of the Child


Repeat the process to register the child.



The screenshot shows a web browser window with the title 'Register Person'. The browser tabs include 'Register Person', 'Prospect Search', and 's47F'. The main content area is titled 'Enter Person's Registration Details' and contains a form with the following fields:

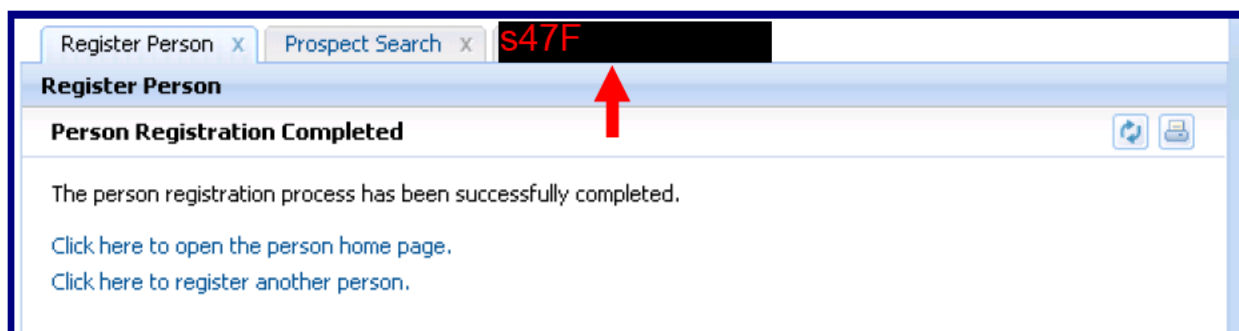
- Name:** Last Name*, Middle Name, Honorific, Gender* (all obscured by 's47F')
- Details:** Date of Birth*, Registration Date*, Preferred Language, Preferred Communication, Preferred Office (all obscured by 's47F')
- Correspondence Address:** Correspondence Address* (obscured by 's47F')
- Other fields:** First Name, Title*, Birth Last Name, Initials, Date of Death, Place of Birth, Country of Birth, ATSI Origin, War Code (all obscured by 's47F')

In the top right corner of the form, there are buttons for 'Register' and 'Cancel'. A red arrow points to the 'Register' button.

Carefully check all details and then click .

The family unit have been registered.

The dependant relationships still need to be created.



The screenshot shows the same web browser window, but the form content has changed to a success message:

Person Registration Completed

The person registration process has been successfully completed.

[Click here to open the person home page.](#)

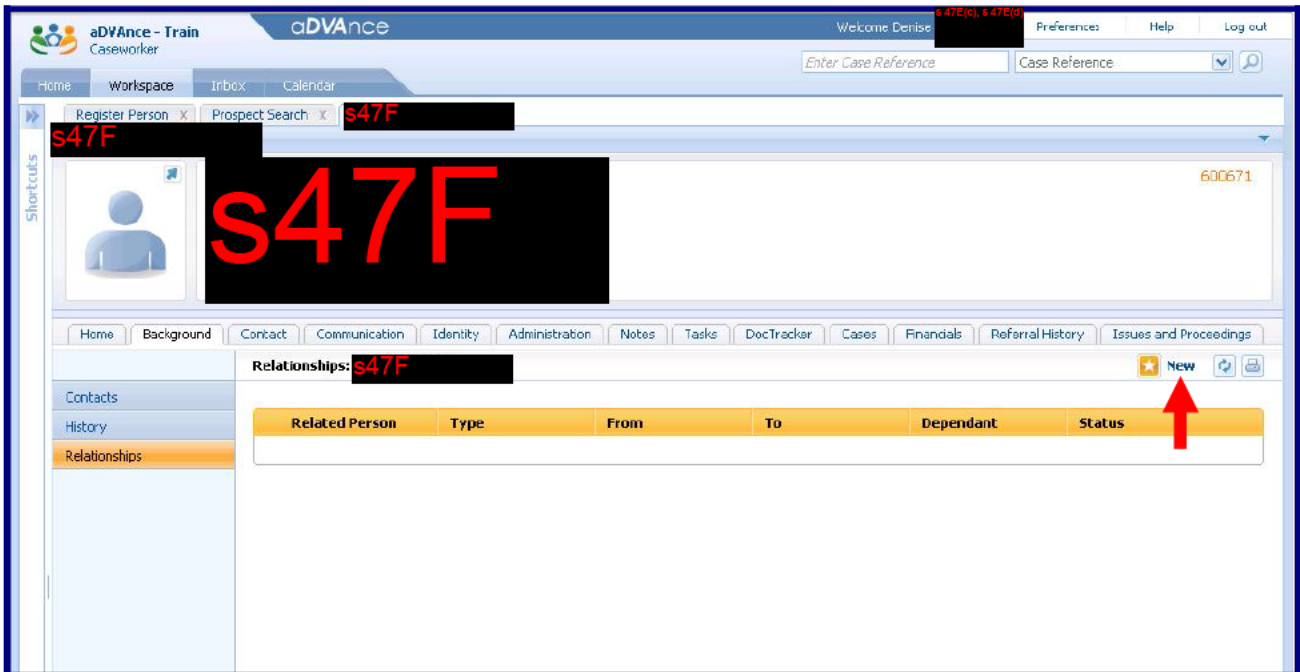
[Click here to register another person.](#)

A red arrow points to the 's47F' tab in the browser.

Access the veteran's Home Page tab.

[Step 4 – Create the dependant relationships](#)

To create the dependant relationships access the Veteran's Relationships page within the Background tab.



Click .

The Create Relationship page is displayed and is unchanged:



The required actions are:

- ❖ Search for the Related Person;
- ❖ Select the Relationship type;;
- ❖ Activate the Dependant Relationship check-box; and
- ❖ Record the Relationship Start Date.

[aDVance Version 6 Upgrade – PRS Registration Guide](#)

[Dependant Relationship Start Dates](#)

When creating Relationships it is very important that the correct Start Date is recorded.

The Date of Registration IS NOT the Relationship Start Date.

Dependant Relationship Start dates are:

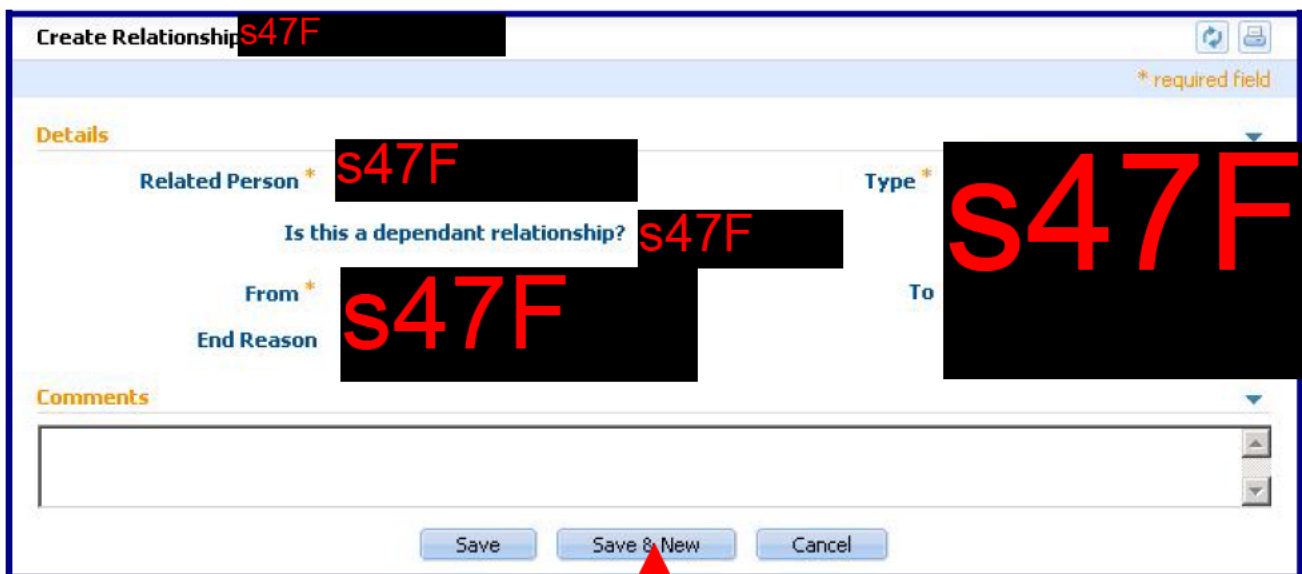
- ❖ [Spouse](#) – the Date of Marriage;
- ❖ [Defacto](#) – the Defacto Relationship Commencement Date;
- ❖ [Child](#) – the child’s Date of Birth (if the child is the natural child of the veteran).

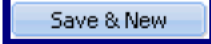
Note 1: If the Child is adopted then the relationship Start Date is the Date of Adoption.

Note 2: If the Child is the defacto’s natural child and born prior to the Defacto relationship then the relationship Start Date is the commencement date of the Defacto Relationship.

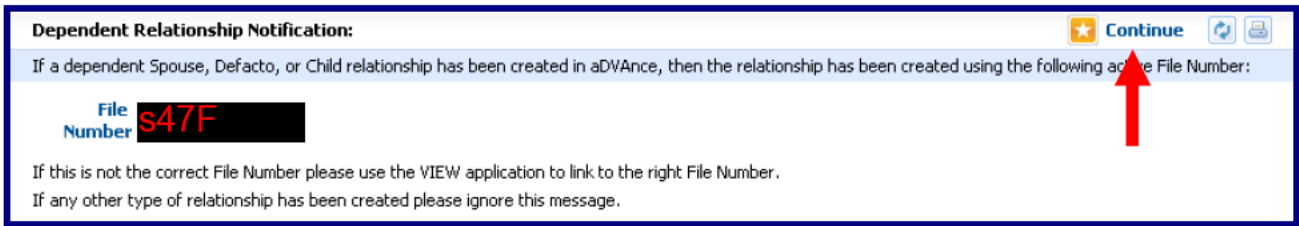
Recording incorrect Relationship Start Dates can impact on both Eligibility and Payability.

Create the Spousal and Child Relationships:



Record the Spousal Relationship and click .

aDVance Version 6 Upgrade – PRS Registration Guide



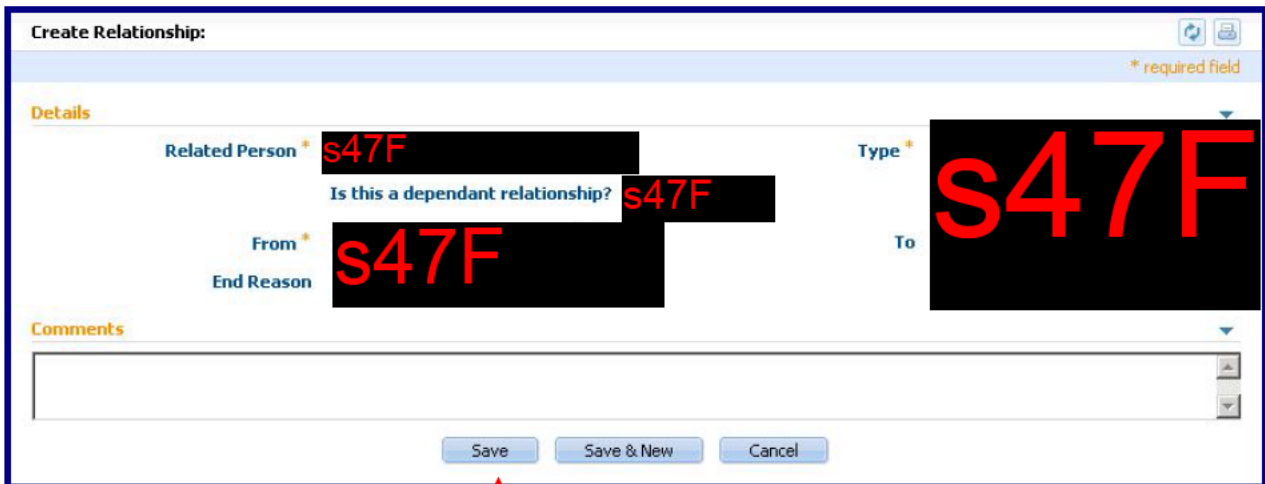
Dependent Relationship Notification: ★ Continue

If a dependent Spouse, Defacto, or Child relationship has been created in aDVance, then the relationship has been created using the following active File Number:

File Number **s47F**

If this is not the correct File Number please use the VIEW application to link to the right File Number.
If any other type of relationship has been created please ignore this message.

The Dependant Relationship Notification displays - Click ★ Continue.



Create Relationship: * required field

Details

Related Person* **s47F** Type* **s47F**

Is this a dependant relationship? **s47F**

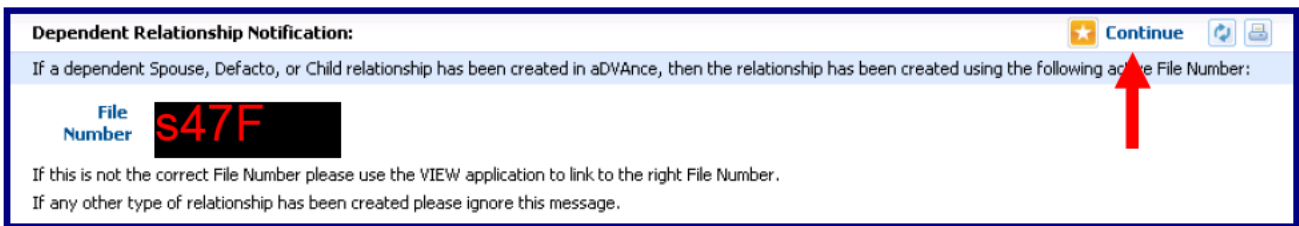
From* **s47F** To **s47F**

End Reason

Comments

Save Save & New Cancel

Record the Child Relationship and click Save.



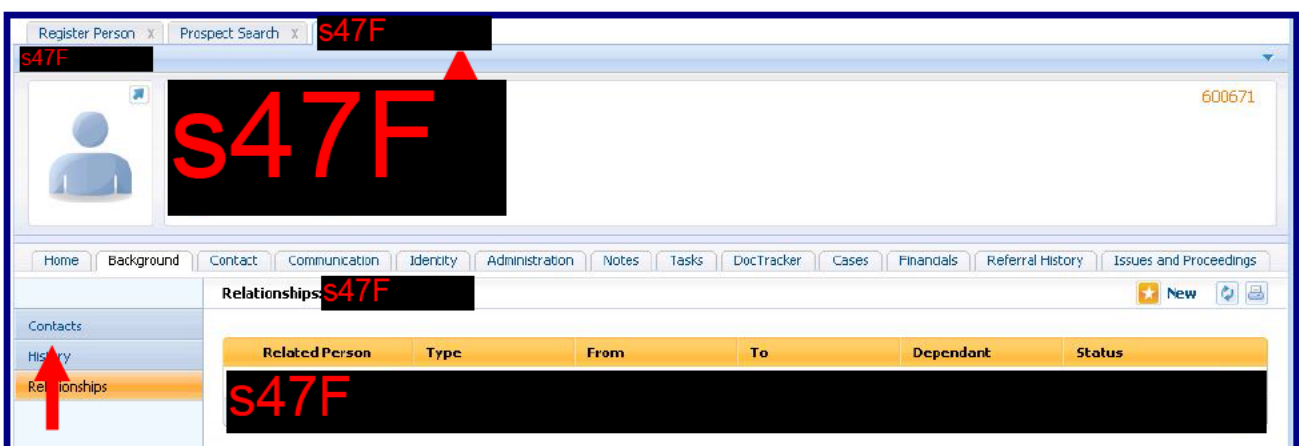
Dependent Relationship Notification: ★ Continue

If a dependent Spouse, Defacto, or Child relationship has been created in aDVance, then the relationship has been created using the following active File Number:

File Number **s47F**

If this is not the correct File Number please use the VIEW application to link to the right File Number.
If any other type of relationship has been created please ignore this message.

The Dependant Relationship Notification displays - Click ★ Continue.



Register Person x Prospect Search x **s47F**

s47F 600671

Home Background Contact Communication Identity Administration Notes Tasks DocTracker Cases Financials Referral History Issues and Proceedings

Relationships **s47F** ★ New

Related Person	Type	From	To	Dependant	Status
s47F					

The Dependant Relationships are recorded. To record a Power of Attorney or other representative access the Contacts page.

CLOSE the veteran's tab to return to your registration Workspace.

aDVance Version 6 Upgrade – PRS Registration Guide

PRS Registration – Worked Example 2:

Claim received **s 47F** [redacted] for a single veteran

Claimant:

Address:

Mobile Phone:

Warcode:

S47F

Access your registration Workspace

aDVance - Train Caseworker

Welcome Denise **s 47E(c), s 47E(d)** Preferences Help Log out

Enter Case Reference Case Reference

Home Workspace Inbox Calendar

Register Person x Prospect Search x

Register Person

Previous Registration Check

Please indicate if the person has previously been registered with the organisation as a different type of participant.

Has this person been registered before with this organisation?

The Person has not been registered before.


The Person has previously been registered as a Representative.

The Person has previously been registered as an Information Provider.

The Person has previously been registered as a Prospect Person.

Click here to exit the registration process.

Click the **“The Person has not been registered before.”** option.

Person Search – enter the veteran’s personal details & click .

Register Person x Prospect Search x

Register Person

Confirm Person Not Already Registered Search Continue

Enter search criteria to help you determine if the person has been registered before. *required field

Search Criteria

File Number

OR

Alternate ID

Last Name **s 47E(c) & (d)**

Date of Birth

Address Line 1

State

Birth Last Name

First Name

Gender

City

Postcode


S47F

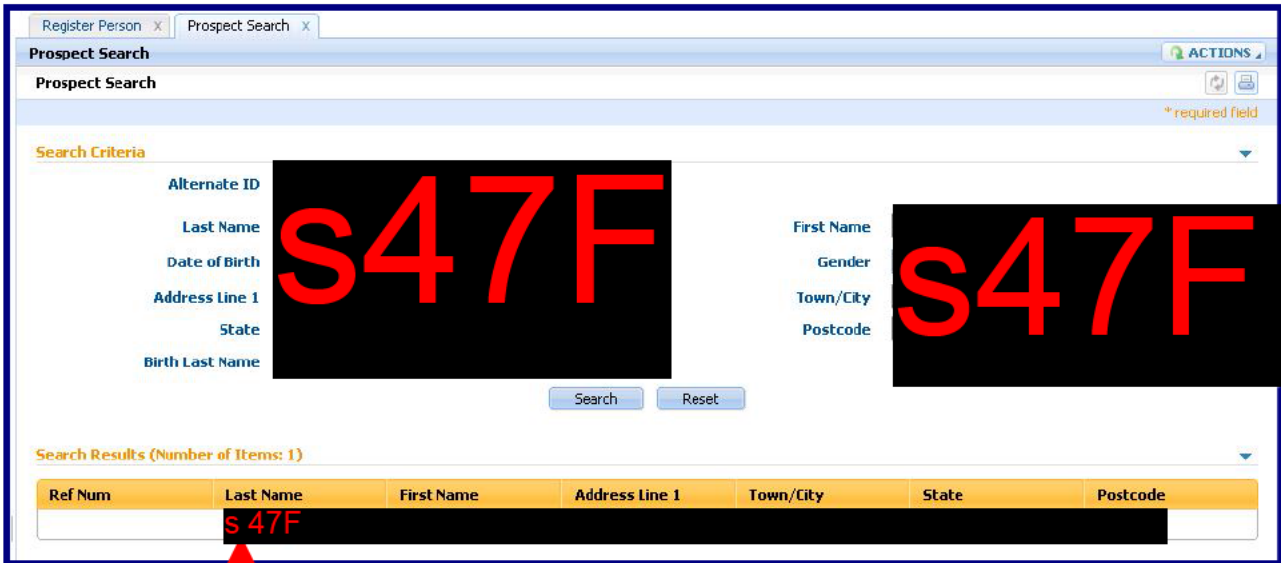
Search Results (Number of Items: 0)

Alternate ID	Last Name	First Name	Address Line 1	State	Postcode	Date of Birth
--------------	-----------	------------	----------------	-------	----------	---------------

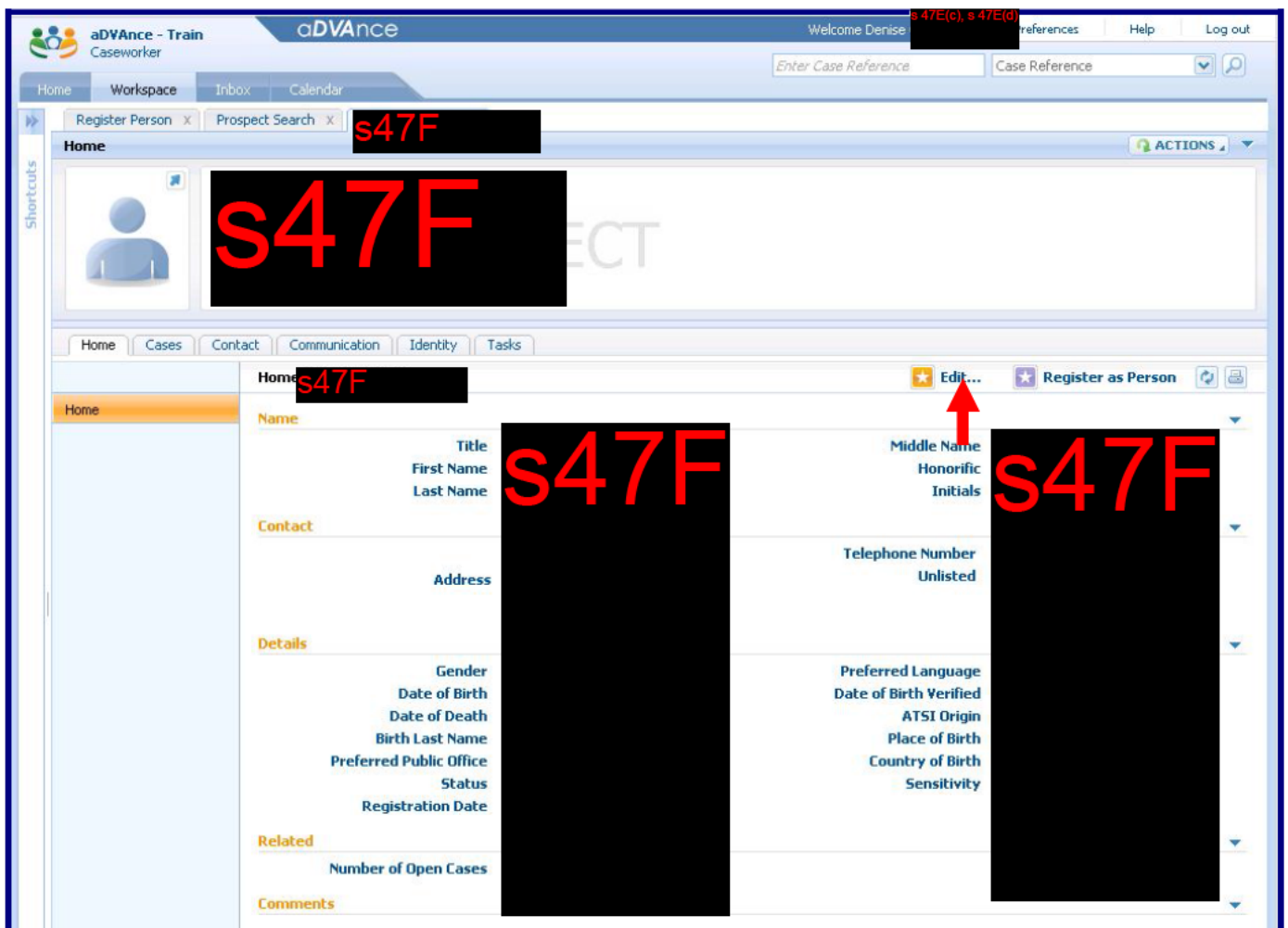
Following an unsuccessful search access the Prospect Search tab.


aDVance Version 6 Upgrade – PRS Registration Guide

Perform a Prospect Search – enter the veteran’s Name and Gender and click . Do not use Date of Birth as a search criteria.



The matching Prospect record is found – click the hyperlinked Prospect’s Last Name to open the Prospect in a new tab..



Check details carefully. Date of Birth is not recorded – click .

aDVance Version 6 Upgrade – PRS Registration Guide

Edit Prospect page:

The screenshot shows the 'Edit Prospect' form with the following fields and sections:

- Name:** First Name *, Middle Name, Last Name *, Initials, Title *, Birth Last Name, Gender *
- Details:** Date of Birth, Date of Death, Registration Date *, Sensitivity, Date of Birth Verification, Preferred Office
- Nationality and Language:** Country of Birth, Preferred Language, Place of Birth, ATSI Origin
- Comments:** A text area for notes.
- Buttons:** Save, Cancel

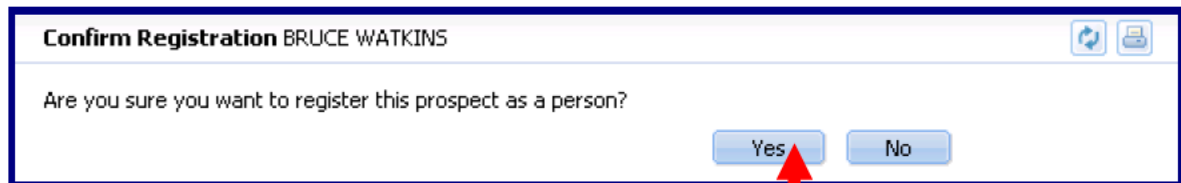
Record the veteran's Date of Birth and correct any incorrect details regarding the Name and Title. Click **Save**.

The screenshot shows the 'Home' page for a Prospect with the following elements:

- Profile Card:** A person icon and a large 's47F' watermark.
- Navigation Tabs:** Home, Cases, Contact, Communication, Identity, Tasks
- Home Tab Content:**
 - Name:** Title, First Name, Last Name
 - Contact:** Address
 - Details:** Gender, Date of Birth
 - Middle Name:** Honoric, Initials
 - Telephone Number:** Unlisted
 - Preferred Language**
 - Date of Birth Verified**
- Buttons:** Edit..., Register as Person

To convert the Prospect to a Person click **Register as Person**.

aDVance Version 6 Upgrade – PRS Registration Guide

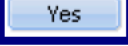


Confirm Registration BRUCE WATKINS

Are you sure you want to register this prospect as a person?

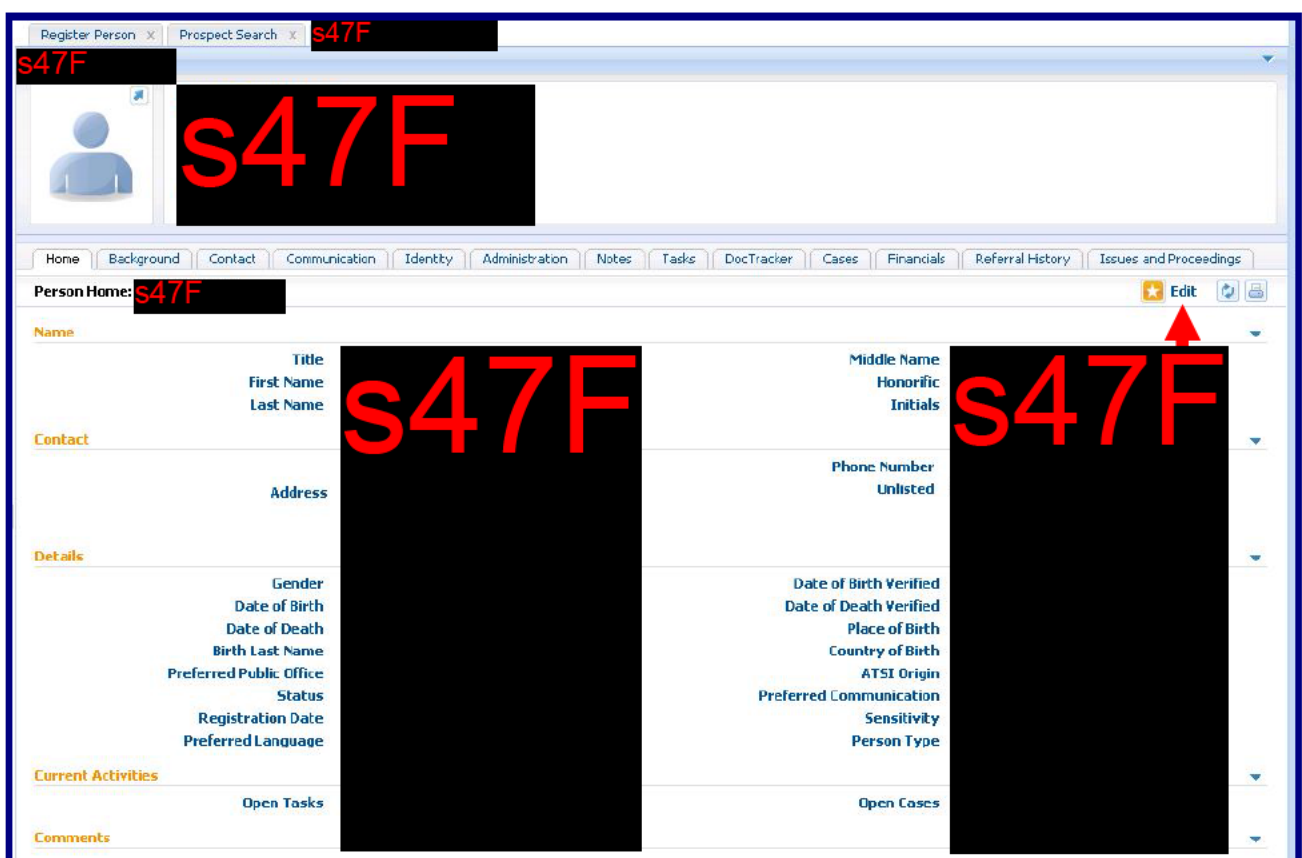
Yes No

A red arrow points to the 'Yes' button.

Click  to confirm the registration of the Prospect as a Person.

The Prospect has been registered as a Person.

The final step is to add the War Code to convert the Person into a veteran record.



Register Person x Prospect Search x s47F

s47F

Home Background Contact Communication Identity Administration Notes Tasks DocTracker Cases Financials Referral History Issues and Proceedings

Person Home: s47F Edit

Name	Title	Middle Name
First Name	Honorific	Initials
Last Name		
Contact	Address	Phone Number
		Unlisted
Details	Gender	Date of Birth Verified
	Date of Birth	Date of Death Verified
	Date of Death	Place of Birth
	Birth Last Name	Country of Birth
	Preferred Public Office	ATSI Origin
	Status	Preferred Communication
	Registration Date	Sensitivity
	Preferred Language	Person Type
Current Activities	Open Tasks	Open Cases
Comments		

A red arrow points to the 'Edit' button.

Click .

The Modify Person page opens.

aDVance Version 6 Upgrade – PRS Registration Guide

Modify Person:

Modify Person: s47F

Save Cancel

* required field

Cancel Person

End Date

Name

Title *

First Name

Last Name

Birth Last Name

Initials

Middle Name

Honorific

Gender

Details

Date of Birth

Date of Death

Registration Date

Sensitivity

Preferred Office

Date of Birth Verification

Date of Death Verification

Preferred Communication

Status

Warcode

Nationality and Language

Country of Birth

Preferred Language

Place of Birth

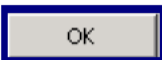
ATSI Origin

Record the War Code and .

Windows Internet Explorer

Note: - Entering a War Code for this Person will automatically result in a File Number being created. If a War Code is not entered then a File Number will not be created. Do you wish to continue?

OK Cancel

War Code message – click .

Home Background Contact Communication Identity Administration

Person Registration Completed

The person registration process has been successfully completed.

The person's alternate ID is s47F

[Click here to open the person home page.](#)

The Prospect has been converted into a Veteran – record the DVA File Number. The VIEW record and UIN also have been created.

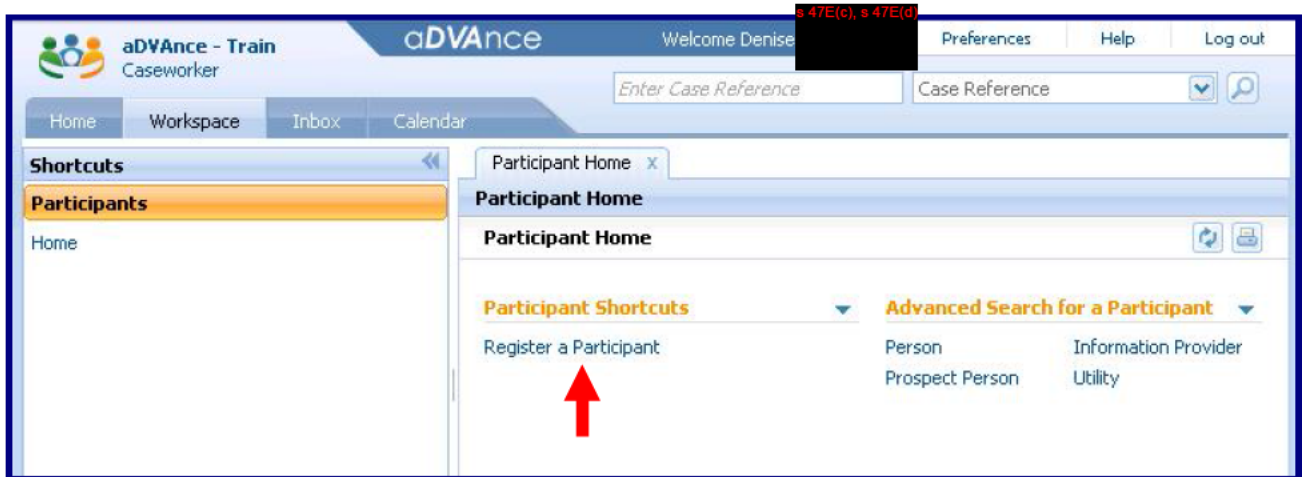
Access their new Home Page and check if any other personal details need to be recorded.

Note: Prospect's only have a Correspondence Address which has been defaulted as both the Residential and Correspondence addresses. Change of Address action may be required.

[aDVance Version 6 Upgrade – PRS Registration Guide](#)

[Alternative Registration screen:](#)

The Workspace Shortcuts panel contains the Participants Home page with links to Register a Participant and alternative participant search shortcuts.



Click the **“Register a Participant”** link.



The Participant Registration screen provides access to register any of the existing participant types.

[Further Information:](#)

For further information access the aDVance Version 6 – Reference Guides section of the aDVance Training sharepoint site:

<http://dvashare/BusinessUnits/Support/RCSS/BSA/aDVance/default.aspx>

The aDVance Training sharepoint site contains a variety of aDVance Version 6 Reference Guides and Powerpoint training presentations.