



## Linking clients to a service provider site

### Importance of linking clients

Clients are linked to their chosen service provider in the portal. This linkage allows service providers to review, sort and edit client records. This relationship safeguards the clients' records by restricting database access to their chosen service provider.

Service providers are responsible for ensuring the client is linked to the appropriate site within their business prior to providing and claiming for services. A provider may be asked to reimburse the Department of Health (the Department) if they claim for services provided to an unlinked client.

### Finding linked clients in the portal

To find a client who is linked to you in the portal, you can look up their record using just one piece of their four points of identification. For example, you could enter their eligibility number, or complete a search using their last name. You are not required to enter all points of their identification.

### Finding unlinked clients in the portal

When a client relocates, the new service provider must confirm that they have the [client's consent](#) and the client's four points of identity (pension number, first and last name, and date of birth). The new service provider must then establish the client and service provider relationship in order to undertake certain functions in the portal,

### More information

Please see the user guide, [searching for existing clients](#), for more information on how to link clients to your site.