



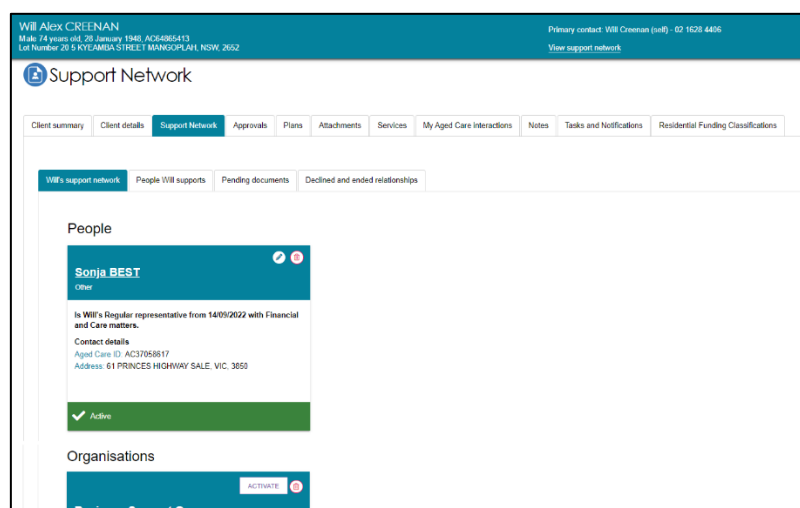
# Overview of client support relationships in the Assessor Portal and myAssessor application

## Purpose

Before June 2022, clients could only be supported in My Aged Care by individual representatives, who can make decisions for and act on behalf of a client. There was no system role that reflected supported decision-making (such as by an advocate), and no capability for organisations to support clients in the system.

This fact sheet provides an overview of the changes that have been made to expand the current My Aged Care representative model since June 2022:

- A new support relationship type of **Agent** (in addition to Regular and Authorised Representatives), a role for organisations and professional individuals who provide support and assistance to a client but cannot make decisions on their behalf.
- A **support person** or **support organisation** can be appointed as an agent or representative for a client.
- Support Organisations approved by the Department of Health and Aged Care (the Department) can establish **organisation relationships** with clients in the system. Currently, support organisations can only be appointed as agents.
- Assessors can view, create and activate support relationships (including organisation and agent relationships) through the updated **‘Support network’ tab** in a client’s record.



This fact sheet supplements *Assessor Portal User Guide 2 – Registering support people and adding relationships* for [\(ACAT\)](#) and [\(RAS\)](#).

## Agent relationships

An 'Agent' can provide support and assistance to a My Aged Care client, access and update a limited amount of client information and be involved in discussions with the client and My Aged Care but cannot make or convey decisions on behalf the client (as a representative can).

- An **organisation agent** is an employee of an organisation approved by the Department to support clients in My Aged Care, such as advocates and care finders. They will access My Aged Care through the Service and Support portal.
- An **individual agent** may be a professional support person who provides support to aged care consumers within a community setting, such as language or cultural support, but is not connected with an organisation approved by the Department. They will access My Aged Care through the Online Account (via myGov).

Difference between the types of My Aged Care support relationships			
A nominated person or support organisation can:	Agent	Regular Representative	Authorised Representative
Give information to My Aged Care including talking to assessors, the My Aged Care contact centre and service providers	✓	✓	✓
Request information about the client's progress in My Aged Care	✓	✓	✓
Submit an 'Apply for Assessment Online' on behalf of a client and create a pending relationship	✓	✓	✓
Register the client in My Aged Care and create a pending relationship ( <b>organisation relationships only</b> )	✓	✓	✓
Access <b>client record information except assessment detail*</b> through the contact centre or in the My Aged Care Online Account	✓	✗	✗
Only able to update the client's <b>contact and service preference information<sup>^</sup></b> through the My Aged Care contact centre or the My Aged Care Online Account	✓	✗	✗
Access <b>all client record information including assessment detail</b> through the contact centre or in the My Aged Care Online Account	✗	✓	✓
<b>Update all of the client's information</b> through the contact centre or in the My Aged Care Online Account	✗	✓	✓
Be nominated as the client's first contact point for My Aged Care phone calls (Primary Contact)	✓	✓	✓
Receive email notifications and copies of correspondence, for example, Home Care Package letters	✓	✓	✓
Upload documents on behalf of the client within My Aged Care systems	✓	✓	✓
Provide consent and convey decisions to My Aged Care on the client's behalf, with their consent, e.g. to commence screening, generate a referral code, request a support plan review	✗	✓	✓
Make decisions on the client's behalf and provide consent to commence an aged care assessment (and complete the My Aged Care assessment consent form), support plan review and send referrals for aged care services	✗	✗	✓

\*Agents can view most information in a client's record (current care approvals, current services and service recommendations, people associated with the care plan, review history, and reablement and linking support history), but cannot view the client's assessment history or view/print the National Screening and Assessment Form (NSAF).

<sup>^</sup>Agents can edit client contact details (phone, address, primary contact), generate a referral code, and set the seeking services preference to 'Yes'. They cannot set the seeking services preference to 'No' or decline a home care package.

## Organisation relationships

Support Organisations in My Aged Care are limited to those organisations approved by the Department and who support 'hard to reach' vulnerable older Australians needing more intensive or specific assistance to access and engage with the aged care system.

A relationship with a Support Organisation will either be with an Outlet (also referred to as Branch) of an approved organisation, or with a named staff member at an outlet.



The initial cohort of support organisations in My Aged Care will be Advocacy organisations. This cohort has been gradually transitioned onto the system from November 2022. Further support organisation cohorts (such as care finders and Indigenous facilitators) will be rolled out with future system updates, and communications will be provided by the Department.

## Assessor Portal changes

The following is an overview of the key changes and processes relevant to assessors, found primarily in the 'Support Network' tab in the client record.

### 'Support Network' tab

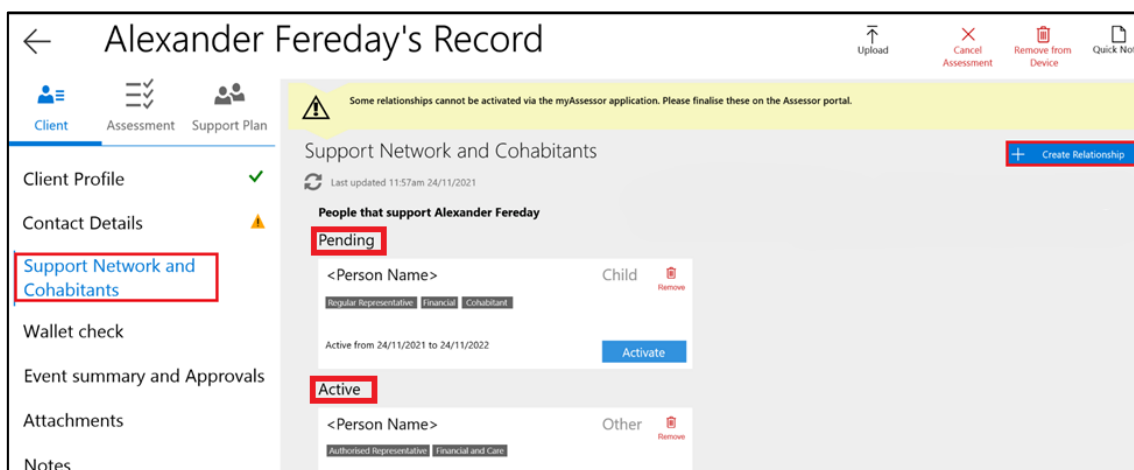
Client support relationships are displayed in the 'Support Network' tab in the client record. In the My Aged Care Assessor Portal and myAssessor app users will be able to differentiate between individual (People), organisation relationships and other relationships (such as a carer).

The screenshot displays the 'Assessor Portal' interface for a client named Mr. Will BOUY. The 'Support Network' tab is selected, showing a navigation menu with options like 'Client summary', 'Client details', 'Support Network', 'Approvals', 'Plans', 'Attachments', 'Services', 'My Aged Care interactions', 'Notes', and 'Tasks and Notifications'. Under the 'Support Network' section, there are sub-tabs: 'Will's support network', 'People Will supports', 'Pending documents', and 'Declined and ended relationships'. The 'People Will supports' section is active, displaying two individual support cards. The first card is for Willis LUDLUM, a Regular representative from 15/03/2017 with Financial and Care matters, with contact details: Aged Care ID: AC18100497, Address: Lot Number 23 9 MATHOURA AVENUE MOUNT AUSTIN, NSW, 2650. The second card is for Alexander MEHAN, a Regular representative from 24/05/2015 with Care matters, with contact details: Aged Care ID: AC3090709, Address: 16 6 DOMINIC DRIVE WOODONGA, VIC, 3690. Both individuals are marked as 'Active'. Below this, the 'Organisations' section is visible, showing a card for 'Elderly Care', which is a Primary Contact and an Authorised representative from 27/06/2022 with Financial and Care matters, with contact details: Branch: Elderly Care Outlet 1, Phone: 0494 333 333, Address: 198 - 200 ELIZABETH STREET SURRY HILLS, NSW, 2010.

There are four sub-tabs within the 'Support Network' page:

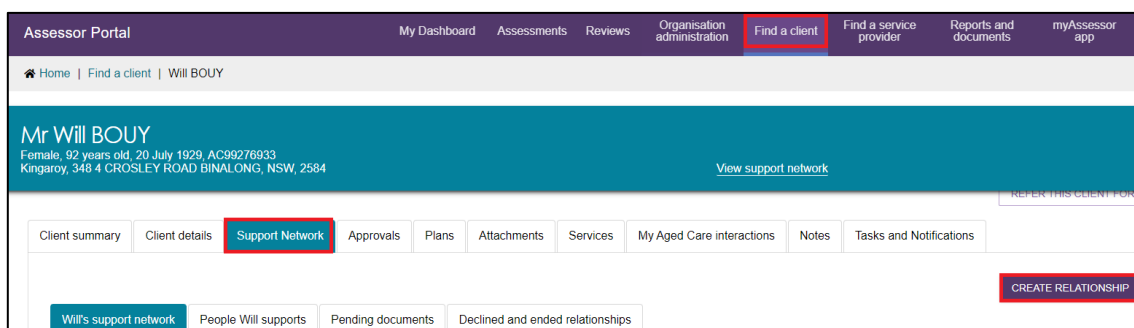
- '<Client name's> support network' displays details of the people and organisations that support the client.
- 'People <Client name> supports' displays other people in My Aged Care that the client may support (e.g. husband/wife).
- 'Pending Documents' lists documents submitted by the client/support person to establish a relationship. This includes 'Appointment of a support person' form (which replaces the 'Appointment of a Representative' form) and 'Appointment of a support organisation' form, and legal documents (pending verification by the My Aged Care contact centre) to establish an Authorised Representative.
- 'Declined and ended relationships' lists the client relationships where one party has declined the relationship, as well as those that have been removed (by either party) or reached their end date.

In the myAssessor App, this information is included in the re-named 'Support Networks and Cohabitants' tab, and is presented slightly differently to the Assessor portal.



### **Updated process for creating Organisation and Individual Relationships (Assessor Portal and myAssessor App)**

1. Assessors can create a support relationship by selecting the 'Create Relationship' button in the 'Support Network' tab. This button replaces both the 'Add representative' and 'Add relationship' buttons.



2. Select the appropriate relationship type, whether the relationship will be with a person or an organisation (the example below is for an Organisation Agent):

01

**About Will's relationship**  
It is important to select these options carefully as they may impact who has access to a person's My Aged Care record, and what actions they can perform.

All fields marked with an asterisk (\*) are required.

The support relationship Will would like to establish is:

- Regular Representative
- Authorised Representative
- Agent
- Carer
- Emergency Contact
- GP
- Support Person

Would you like to appoint a Person or an Organisation? \*

Person: Someone who is not part of a support organisation (e.g. a family member)  Organisation: Staff at a support organisation (e.g. an advocacy organisation)

3. If selecting an organisation relationship, assessors can search by Organisation name or suburb.  
A list of potential matches will be displayed, where the appropriate organisation can be selected and verified before proceeding.

02

**Add support organisation details**  
Enter support organisation and relationship details.

**Search for your support organisation \***

Enter organisation name  
 Enter suburb/postcode

Enter organisation name \*  
Care

SEARCH CLEAR

1 to 1 out of 1 matching result

Select	Organisation	Branch	Support offered	Suburb
<input checked="" type="radio"/>	Elderly Care	Elderly Care Outlet 1	Representative	SURRY HILLS, NSW 2010

**You have selected**

Organisation	Branch
Elderly Care	Elderly Care Outlet 1
Address	Phone
198-200 ELIZABETH Street SURRY HILLS NSW 2010	0404333333

4. Based on the client's preferences, the following information can be entered:
  - **Named staff member relationship:** If the client only wants to work with a specific staff member at the support organisation and does not want to work with anyone else, enter their name (free text). If the client selects this option, no one else from the support organisation except the named staff member will be able to access their record, as the client has only consented to that specific staff member supporting them.
  - **Relationship duration:** The relationship start date will default to the current date but can be updated to a future date if required, and the relationship will be pending until the start date is reached. The relationship end date is optional but must be completed if the relationship is time limited.

All support workers at the organisation will be able to assist Will Bouy.  
If Will Bouy only wants to work with one person they already know, please enter the person's full name here.

Full name of support person: \_\_\_\_\_

Elderly Care / Elderly Care Outlet 1 will be Will's:\*

Advocate

When should the relationship start?  
Enter an end date if you would like the relationship to be time limited.

Relationship start date (DD/MM/YYYY) on or after: \*

16/02/2023

Relationship end date (DD/MM/YYYY): \_\_\_\_\_  
(e.g. dd/mm/yyyy)

### Capturing consent and creating relationships

Before creating a relationship, assessors are required to indicate the client (and nominated supporting person or organisation) has provided informed consent to enter into a support

relationship. This is to ensure the client and support person understand the relationship they are entering into and their obligations.

04  
**Consent**  
Both parties must provide their consent, either verbally or via the 'Appointment of a support person or organisation form' before the relationship can be activated.  
If only one party has provided consent, the relationship can be created as pending.

Has Elderly Care / Elderly Care Outlet 1 consented to assist Will Bouy in My Aged Care, and acknowledged the declaration below? \*

**I declare that:**

- Any information my organisation or I provide to My Aged Care about myself, staff, the organisation, or the person being assisted is complete and correct.
- Any information my organisation or I obtain from My Aged Care will be kept confidential and will not be disclosed to any unauthorised person without the permission of the person making this appointment.
- The information provided in this form is complete and correct.

**I understand that:**

- Making this Appointment will create a record for the person being assisted in My Aged Care, if the person being assisted doesn't already have one.
- This Appointment is specific to interactions with My Aged Care.
- If my organisation or I am the nominated Primary Contact, I (or my organisation) will be the first point of telephone contact for My Aged Care for the person being assisted.
- This Appointment can be cancelled at any time by calling My Aged Care on 1800 200 422 or through the Service and Support Portal.
- I must inform My Aged Care of any changes to my address and contact details, and changes in the circumstances of the person who has appointed me.
- Giving false or misleading information is a serious offence.
- I may receive correspondence on behalf of the Aged Care Client I am assisting.

Yes  No

Has Will Bouy consented to Elderly Care / Elderly Care Outlet 1 accessing their information in My Aged Care in order to assist them to make decisions as their agent? \*

**I declare that:**

- I am voluntarily appointing an agent.
- The information I provide to My Aged Care is complete and correct.

**I authorise My Aged Care, including Commonwealth funded service providers and assessors to:**

- Collect information about me from my agent.
- Discuss my progress in My Aged Care with my agent.

**I understand that:**

- Making this Appointment will create a Client Record for me in My Aged Care, if I don't already have one.
- This Appointment is specific to interactions with My Aged Care.
- My agent may receive correspondence about me from My Aged Care.
- I can cancel this Appointment at any time by calling My Aged Care on 1800 200 422 or through my Online Account.
- Giving false or misleading information is a serious offence.

Yes  No

Written consent can also be provided in a completed 'Appointment of a support person' form (for individuals) or 'Appointment of a support organisation' form (for support organisations), and uploaded as part of the relationship creation process.

03  
**Upload Appointment of support person or organisation form**  
Upload an Appointment of support person or organisation form

Appointment of a support person or organisation form

No file chosen

Name of attachment



When creating an Authorised Representative relationship, consent is only required to be captured from the nominating Authorised Representative as the client is unable to provide consent to the relationship. The supporting legal documentation (and a letter from a medical practitioner where required) will need to be verified to establish the relationship.

### Unable to obtain consent from both parties

If an assessor is only able to obtain consent for one party (e.g. the client), the relationship will be created as 'pending' and a relationship request will be sent on-system to the other party for acceptance.

The other party can provide their consent:

- over the phone with the My Aged Care contact centre
- by accepting the relationship request in the 'Support Networks' tile in their Online Account (if the other party is an individual with access to the Online Account)
- by accepting the relationship request from the 'Manage client relationships' tile in the Service and Support Portal (if the other party is a support organisation)

## Legal document requirements for Authorised Relationships

Legal documents are mandatory to be uploaded when creating an Authorised Representative relationship in My Aged Care. This is to ensure that the appropriate documentation has been provided to My Aged Care before the relationship is established.

The primary legal documentation must be uploaded, and assessors have the option to upload a secondary legal document e.g. a letter from a medical practitioner, according to the documentation requirements included in the [Fact sheet for Assessors – Confirming Authorised Representatives in My Aged Care](#).

04

**Add legal documentation**  
Add legal documentation to support the creation of the Authorised Representative relationship.

**To become an Authorised Representative, you must provide legal documentation, and in most cases medical documentation, to demonstrate that support person/Organisation is authorised to do so and that the Client is unable to act on their own behalf. For more information see [website](#)**

Are you able to verify the authorised representative documents?

Yes  No

Legal Documentation \*

My Aged Car...0220614.pdf

Document name \*

Legal Document W.Bouy

Medical Practitioner Letter

No file chosen

Document name

Assessors can indicate whether they have been able to verify the legal documents provided i.e. providing the appropriate legal authority (according to State and Territory requirements) to act on the client's behalf as an Authorised Representative.

When creating an Authorised Representative, if an assessor is:

- **Able to verify the provided legal documentation:** select 'Yes' and upload the verified legal documents and select the 'Create relationship' to create and activate the relationship.
- **Unable to verify the documents provided:** select 'No' and upload the documents and select the 'Submit to My Aged Care' button. This will create a pending relationship and submit the documents to the My Aged Care contact centre to verify the documents and activate the relationship.
- **Not provided with any legal documents:** advise the Authorised Representative to establish the relationship by submitting their documents to the My Aged Care contact centre or submit from their Online Account.

## For further information

Call the My Aged Care assessor and provider helpline on **1800 836 799** for support and technical assistance. The helpline is available 8am to 8pm Monday to Friday and 10am to 2pm Saturdays, local time across Australia.

The Department will communicate additional information in relation to the expansion of the available support organisations in My Aged Care.