

# Service and Support Portal User Guide - Tasks and Notifications

The My Aged Care Service and Support Portal includes a tasks and notifications feature to inform users and prompt action. The first part of this guide explains the how to view and action tasks and notifications.

An Administrator can also configure preferences for email alerts. The final section of this guide let Administrators know how to manage and update task and notification preferences for their outlet or organisation.

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## What is the difference between a Task and a Notification?

A task is an activity that a provider needs to action (finalise or close), for example a task reminding a team leader to action an overdue referral.

A **notification** is an activity that informs the provider of an event, for example when a new referral is received by an outlet. The provider may need to complete an action as a result of the notification.

All staff with access to the Service and Support portal will have access to view tasks and notifications.

! You will receive a notification when a client's status has changed to 'Deceased'.

You should review the client record to see if further action is required, for example you may need to close or finalise any active referrals or cease services for the client.

#### Viewing and actioning tasks

1. From the Portal homepage select 'Tasks and notifications'.

1800 836 799 Mon-Fri 8am - 8pm Sat 10am - 2pm		Welcome Charles from Aussie Aged Care	
Service and Support Portal			Logout
welcome Charles			_
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Service referrals	Tasks and notifications	Quality indicators	
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My Aged Care interactions	Reports and documents	Government Provider Management System	

2. The 'Tasks' tab will open by default.

Tasks and notifications           Tasks         Notifications           Maximum HCP wait times		
Filter by	Fedure	And Community
ADVANCED SEARCH CLEAR FILTERS	riisk hanne	Aged Carle User ID
Outlet name is Horton House and Warmington Lodge		

In the Tasks tab, you will be able to view all tasks that are relevant to your role. You can sort tasks by:

- Received
- Category
- Title/Description
- Aged Care User ID
- Client name
- Activity ID

! Tasks that have been marked as important for your outlet by your outlet administrator will be displayed with a visual indicator. See <u>Managing task and notification preferences</u> for more information.

Alternatively, if you want to see all tasks and notifications for a single client, navigate to the 'Tasks and Notifications' tab in the client's record to see all relevant tasks and notifications for that client.

You will only be able to see tasks and notifications that are associated to your outlet and for clients you are providing services to. Assessors will be able to see all tasks and notifications for clients.

Tasks	and no	tifications				REQUEST A REVIEW
Client summary	Client details	Referrals for my organisation	Plans Attachments Ag	vrovals Services My Aged Care interactions Notes Tasks and Notifications		
Filter by	y					$\odot$
Туре	© Due Date	Received Date	Category	Trite/Description	Channel     Activity Id	Portal
Notification		03/09/2020	Client Services	Care Extension Request A form Delegate Decision has been made for a care extension request. Details are as follows - Agent Care User (4: 505/35205) Servors: Rendential Republic High Care Requested by Outlet name: Decision: Update Accepted Delegate Name: Assigned to UTC Chartes Og to: Associate	1-75211993	605 Service Provider Portal

3. You can search for specific tasks using the filter options or using custom filters in Advanced Search. Select the arrows to the right to expand or collapse the filter options.

Tasks Notifications			
Filter by			0
Last name:	First name:	Aged Care Liser ID:	
ADVANCED SEARCH CLEAR FILTER	5		
FILTER CLEAR			

To apply custom filters, select 'ADVANCED SEARCH' and choose filters from the drop-down menu and select 'ADD FILTER' for each filter you want to apply.

Search tasks				x
Tasks Choose an item. Activity ID Aged Care User ID Category Date received Due date First name Last name Marked as important Overdue tasks Role Title	ADD FILTER	SAVE FILTER	CLEAR FILTER	
				FILTER CANCEL

The hyperlink under the task description will take you directly to the individual record and the section of the portal where you can action the task. Alternatively, you can navigate to the client's record by selecting the client's Aged Care User ID from the tasks list.

For example, selecting the link in an 'Overdue referral' task will take you directly to the 'Incoming referrals' tab where you can review the referral and determine whether to accept or reject the referral or place the client onto a waitlist, where appropriate.

Once the action required from the task has been completed, the task will automatically be removed from your task list.

### **Viewing notifications**

1. From the portal homepage select 'Tasks and notifications' and select the 'Notifications' tab.



2. In the Notifications tab, you will be able to view notifications from the last 30 days that are relevant to your role. Any notifications older than 30 days will be removed and will no longer be visible in the portal.

The earliest date that the notifications are displayed from is visible under the filter options.

	notificati	ons •					
Filter by							Ø
Last name		First name Aged Care user /D					
ADVANCED SEARCH	CLEAR FILTERS						
FILTER CLEAR	31 August 2020 and O	uttet name is Koton House and Warmington Loope					
Select all							
Received	Category	© TitleDescription	Channel	Aged Care User ID	Client name	Select	Remove
29 September 2020	Client Services	Lab Commencement Date Technical to be non-connected by the conneccement date entered is too far in the Matrix Modelum Priority service type that is Transition Care or Residential Care) Open Type Intergential Report Survey Care Prior Type In		<u>AC19376287</u>	SAND Baron		8

Alternatively, if you want to see all tasks and notifications for a single client, navigate to the 'Tasks and Notifications' tab in the client's record to see all relevant tasks and notifications for that client.

You will only be able to see tasks and notifications that are associated to your outlet and for clients you are providing services to. Assessors will be able to see all tasks and notifications for clients.

Tasks     Client summary	and no	ntifications	Plans Atlachments	Approvals Services My Aped Care Interactions Notes	Tasks and Netlifications			REDUEST A REVIEW	CLIENT RECORD
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Netification	<ul> <li>Dar Dar</li> </ul>	03/09/2020	Client Services	The Constant of Page 2014 A formal Delegate Decision has been made for a care enter A formal Delegate Decision has been made for a care enter A formal Delegate Decision has been made for a care enter B express of Page 2014 B exp	testion report. Details are as follows -	Unarries	1-75211993605	Portia Service Picvider Portal	

3. In the Notifications tab, you can sort notifications by:

- Received date
- Category (activity subtype)
- Title/Description
- Aged Care User ID
- Client name

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asks No	otifications HCP N	Notifications Maximum	h HCP wait times					
Filter by	У							Ø
Last Name		First Name	Aged Care User ID	-		1 to 20 or	d of 2 motobi	na roquita
ADVANCED	SEARCH	LEAR FILTERS						
FILTER	CLEAR							
Select all								
Received +	Category +	Title/Description		Channel ··	Aged Care User ID	Client name	Select	Remove
Received + 7 May 2022	Calegory RFA Classification	Title/Description The reclassification is of ACC classification for A to <classification level=""> <dd mm="" yyyy="">.</dd></classification>	or completed and there is a change in AN- gad Care User ID <aged care="" id="" user=""> for <care type=""> with effective date from</care></aged>	Channel + <text></text>	Aged Care User ID AC12345678	Client name     Johnny Bravo	• Select	Remove
Received *	Category  RFA Classification	TitleDescription The reclassification is of ACC classification for A to <classification <ddimm="" levels="" yyyy="">. Go to: Residential Care</classification>	completed and there is a change in AN- god Care User ID ~Aged Care user ID> for <care type=""> with effective date from</care>	Channel = <text></text>	Aged Care User ID AC12345678	Client name     Johnny Bravo	Select	Remove
Received 7 May 2022	Category + RFA Classification	Title/Description The reclassification is a ACC classification for A or classification for A or classification is a C classification for A ACC classification for A at <classification <<="" a="" at="" is="" li=""></classification>	completed and there is a change in AN- qued Care User IDAged Care user ID- for <care type=""> with effective date from completed and there is no change in AN- qued Care User IDAged Care user ID&gt;- for <care type=""> with effective date from</care></care>	Channel < <text> <text></text></text>	Aged Care User ID AC12345678 AC87654321	Client name     Johnny Bravo     Eddie Brock	- Select	Remove

! Notifications that have been marked as important for your outlet by your outlet administrator will be displayed with a visual indicator. The <u>managing preferences</u> section in this guide explains how to set notifications as important.

Received 🐟 Category	Title/Description	Aged Care User ID 🛛 🗇	Client name	Select	Remove
28/06/2017 Referrals	New Referral You have a new referral from My Aged Care. Referral created at : 20/07/2017 18:29 Aged Care User Id: AC41264185 Outlet Name : Aged Care Allied Health & Residential Service Type : Allied Health and Therapy Services Priority: Medium Activity Id: 1-20852188999 Incoming Referrals	<u>AC48007322</u>	JORGENSEN Andy		

4. You can also remove individual or bulk notifications from your portal by selecting the Remove icon, then select "ACCEPT".

Filter by	Remove Notification		
Received 🗢 Category	This will remove selected notification from the current notifications list.	Select	Remove
20/07/2017 Referrals	Aged Care User Id: AC41204165 Outlet Name : Aged Care Alied Health & Residential Service Type : Allied Health and Therapy Services Priority: Medium Activity Id: 1-20852188999 Incoming Referrals		

5. You can search for specific notifications using the filter options or using custom filters in Advanced Search. Select the arrows to the right to expand or collapse the filter options. To apply custom filters, select "ADVANCED SEARCH" and choose filters from the drop-down menu and select "ADD FILTER" for each filter you want to apply.

Last name:	First name:	Aged Care User ID:	
ADVANCED SEARCH	CLEAR FILTERS		
Date received is after 21	June 2017		
FILTER CLEAR			

6. The hyperlink under the notification description will take you directly to the individual record and the section of the portal where you can view more information about the notification or complete any action that may be required.

13/07/2017	Referrals	New Referral	AC69957041	SCOTT Keri	(Ê)
		You have a new referral from My Aged Care. Referral created at : 13/07/2017 15:34 Aged Care User Id: AC09957041 Outlet Name : Aged Care Allied Health & Residential Service Type : Domestic Assistance Priority: Medium			Ŭ
		Activity Id: 1-20827807534 Incoming Referrals			

For example, selecting the link in a 'New referral' notification will take you directly to the 'Incoming referrals' tab where you can view and action the new referral.

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comin	g referrals	ŀ	Waitlist	A	ccepted services	pend	ling	Servic	ces in place	R	eferral history					
																LIST
Fi	lter by															Ø
															1 to 1 out of 1 matching	g re:
	Last name	0	First name	0	Aged care user ID	¢	Due date	¢	Referred date	¢	Service type	¢	Recommended start date	¢	Priority	

### Managing task and notification preferences

You must be an Administrator to manage task and notification preferences for your organisation or outlet.

If you need to add this role to your user account, please see your organisation administrator.

As an administrator, you will be able to:

- edit email address and email frequency for new task and notifications
- turn off visibility of notifications in the assessor portal
- view descriptions of each task and notification, including which user types will be able to see them
- edit individual task and notification preferences
- mark a task or notification as important to your outlet.

These settings will affect all staff assigned to your outlet, so please ensure all staff are made aware of any changes you make.

1. From the Service and Support portal homepage select 'Tasks and notifications'.

1800 836 799 Mon-Fri 8am - 8pm Sat 10am - 2pm		Welcome Charles from Aussie Aged Care
Service and Support Portal		Logo
Welcome Charles		
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My Aged Care interactions	Reports and documents	Government Provider Management System

2. Select the 'Manage Preferences' tab.

! If you are the Organisation Administrator, you will be able to select which outlet you want to configure task and notification preferences for.

If you are the Outlet Administrator, you will only be able to see your outlet's preferences.

Provider Portal	L
me   Manage Preferences	
Tasks and notifications           sks         Notifications           Aged Care Allied Health &	
Email nouncation preferences for this Oddet are.	
• ON (?)	
ON ? Notifications are CUSTOMISED	
ON ? Notifications are CUSTOMISED Emails are being sent to	
ON ON ON CHANGE PREFERENCES	
ON ON ON CUSTOMISED Emails are being sent to CHANGE PREFERENCES	

3. The preferences page for the outlet will open. At the top of the page, you can configure the overall preferences for email preference, email address, email frequency and notification visibility in the portal.

You can choose to hide all notifications or hide individual notification types for the outlet.

Selecting 'No' to hide all means that no notifications for the outlet will be visible to staff associated with the outlet.

Selecting 'No' for an individual notification type means that only notifications of that type will be hidden for staff associated with the outlet.

Change preferences fo	r Aged Care Allied Health & Residential
Receive emails for new tasks and notifications           ?           Yes         No	
Send email to:	
Send emails: ?	
Show notifications in the portal? ? Yes No RESET PREFERENCES ?	

4. Tasks and notifications are sorted by category. Select the arrow icon to expand/collapse each category.

Show notifications in the portal? ? Yes No	
RESET PREFERENCES	
Client Services	0
Organisation Administration	$\odot$
Quality Indicators	$\odot$
Referrals	$\odot$

For each task or notification you will be able to view:

- Type (e.g. task or notification).
- Title and brief description of the why the task or notification has triggered.
- User type who can view or action the task or notification.

For each task or notification you will be able to individually configure:

- Whether to send an email when a task or notification generates.
- Frequency of email notification, if enabled.
- Whether to display a task or notification as important in the portal.

Took: Overdue Referrel		
A referral has not been accept	ed or rejected within required timeframes. Please review and action this referral as soon as possible	
This task is seen by:SP Tear	n Lead	
Send an email when this typ received?	e of task is	
Yes No		
Sand the small:		
Senu ule email.		
Immediate	portant?	
Show this type of task as im	portant?	
Show this type of task as im Yes No Notification: Client Ident A client has been deactivated	portant? Ity and Info In the My Aged Care system, and their Service referral has been automatically recalled.	
Show this type of task as im Yes No Notification: Client Ident A client has been deactivated This notification is seen by:	portant?  Ity and Info In the My Aged Care system, and their Service referral has been automatically recalled. SP Team Lead	
Show this type of task as im Yes No Notification: Client Ident A client has been deactivated This notification is seen by: Send an email when this typ received?	portant?  ity and Info In the My Aged Care system, and their Service referral has been automatically recalled. SP Team Lead e of notification is	

If you choose to mark a task or notification as important, staff within your outlet who can view that particular task/notification will see a visual indicator in their portal. For example, a notification of home care correspondence.

Received 🗢 Category	Title/Description	٢	Aged Care User ID ♦	Client name	Select	Remove
28/06/2017 Referrals	New Referral You have a new referral from My Aged Care. Referral created at : 20/07/2017 18:29 Aged Care User Id: AC41264185 Outlet Name : Aged Care Allied Health & Residential Service Type : Allied Health and Therapy Services Priority: Medium Activity Id: 1-20852188999 Incoming Referrals		<u>AC48007322</u>	JORGENSEN Andy		

5. Select 'SAVE' when all changes have been made. You can reset the preferences by selecting 'RESET PREFERENCES' at the top of the page.



## For more information and support

Further information is available from the <u>My Aged Care for service providers</u> website.

The My Aged Care Service Provider and Assessor Helpline is available by calling 1800 836 799.

