Service and Support Portal User Guide – Managing Referrals for Service

This User Guide is designed to for Team Leaders within the My Aged Care Service and Support Portal and describes the procedures for managing referrals.

Each provider outlet needs at least one person assigned the 'Team Leader' role in the portal. This person will be responsible for managing referrals for service (accepting, accepting to waitlist, rejecting referrals and revoking referrals after acceptance) within the portal.

This guide contains the following topics:

Introduction

Service Providers may receive referrals from clients for services via four different pathways:

1. Clients with existing approvals for care types under the *Aged Care Act 1997* (the Act) can approach service providers directly. These clients may not be registered with My Aged Care.

2. Providers can receive electronic referrals for service via the Portal.

3. Clients can approach providers directly with a referral code issued by assessors or the My Aged Care contact centre; or

4. Providers can accept electronic referrals to their waitlist, if a waitlist is available.

These pathways are described in detail in this guide.

For further detail regarding the procedures for managing referrals, please refer to the My Aged Care Service and Support Portal User Guide: Part 2 - Team Leader and Staff Member functions.

> ! All clients with existing approvals should be registered in My Aged Care. Please contact the My Aged Care Assessor and Service Provider helpline on 1800 836 799 for further assistance.

Viewing Referrals

To view referrals and search for a particular client:

1. Select 'Service referrals' from the homepage.

Team Leaders and Staff Members can view referrals, however only Team Leaders can accept, accept to waitlist, and reject referrals or revoke referrals after acceptance. You may have multiple roles within the provider portal. Your homepage will display different tiles depending on the role(s) you are assigned.
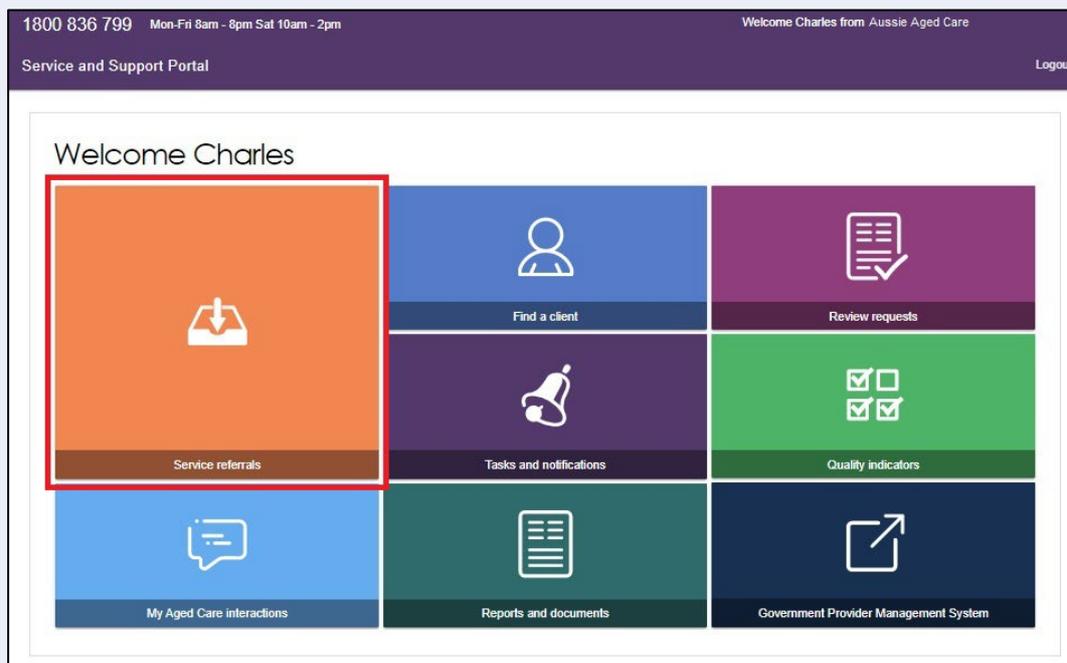
Alternatively, from any other page in the Service and Support portal, you can choose the 'Service referrals' option from the tool bar displayed at the top of the portal.

You will need to select the relevant outlet name to ensure that you are looking for referrals in the correct outlet. This can be done by selecting the outlet name from the top right corner of the portal, next to the 'Logout' link.

2. The 'Incoming referrals' page will now display a list of incoming referrals (those that have not been actioned).

You can alternate between card and list view by using the toggle at the top of the page.
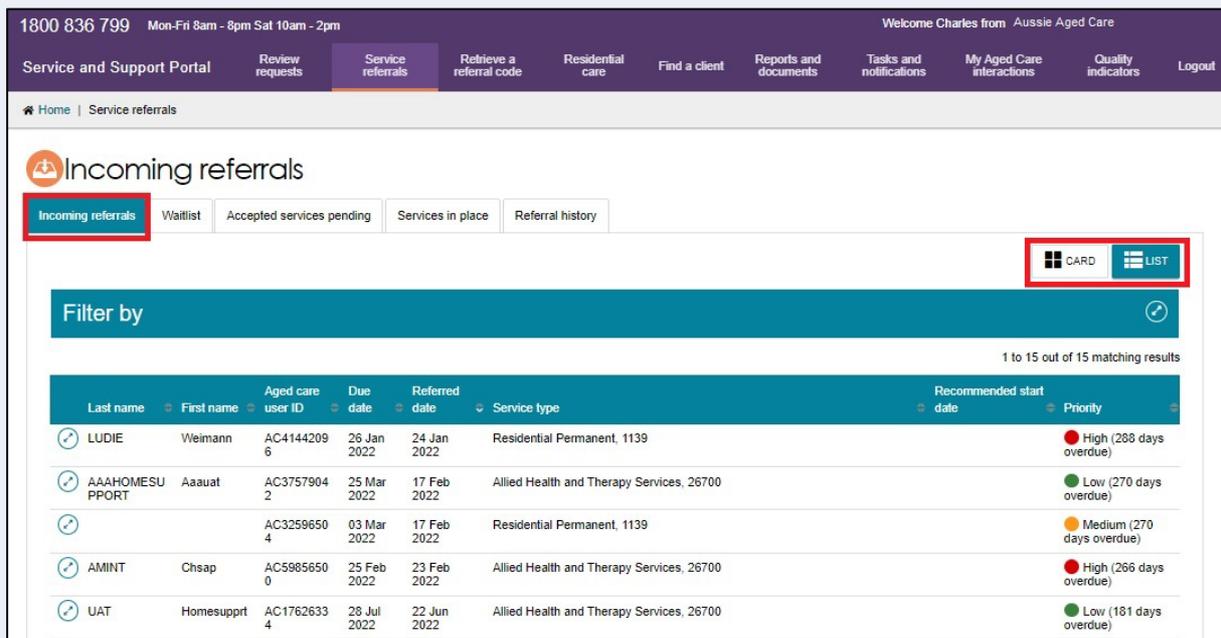
3. You are able to refine the search results by entering a client's First name, Last name, or Aged Care User ID. You can show the filter option by clicking the double arrows (expander) icon at the right of the filter bar.
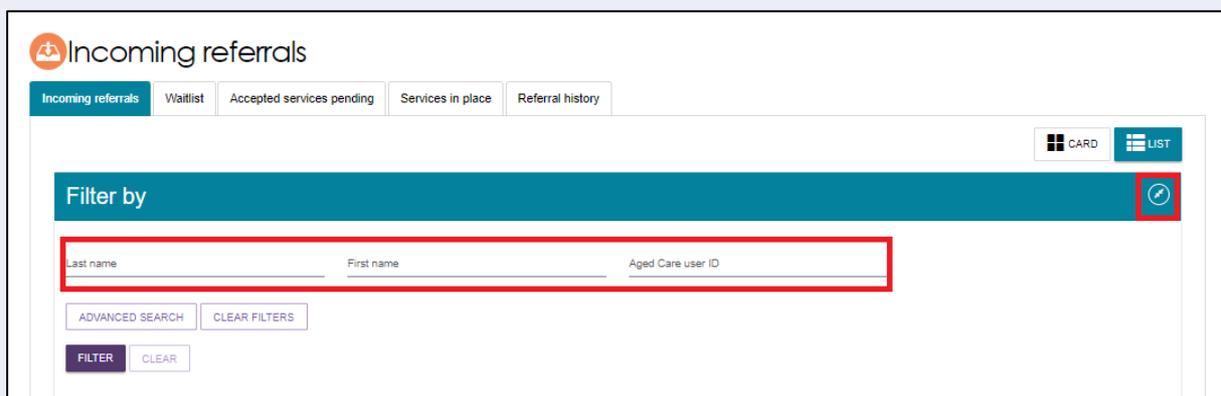
You can use the 'Advanced search' link to expand search parameters.

The following search filters can be chosen from the 'Optional Filter Field' drop down box and applied to your search by clicking 'Add Filter'. You can save any filters that have been applied by selecting 'Save filter', so that they may be quickly used again through the 'Advanced search' option.

- Aged Care User ID
- Due date
- First name
- Last name
- Locality
- Outlet
- Postcode
- Priority
- Recommended start date
- Referred date
- Service type
- State
- Suburb

When finished, select 'Filter'.

Alternatively, these referrals can also be sorted by the following fields, in either ascending/descending or alphabetical A-Z/Z-A:

- Client Last Name
- Client First Name
- Aged Care User ID
- Suburb
- State
- Postcode
- Locality
- Date Referred
- Due Date
- Recommended Start Date
- Priority
- Service Type

Accepting or Rejecting a Referral for Service

To accept a referral for service, select 'Service referrals' from the home page, the toolbar at the top of the portal, or the side-bar from the Menu option at the top left of the portal and follow the procedure below.

1. From the 'Incoming referrals' tab in 'Service referrals' select the expanding arrows at the top right of the referral in card view, or to the left of the referral in list view, that you wish to view to display information about the referral.

! Referrals for waitlists are no longer sent as a specific waitlist referral. If a waitlist is available for the service the client has been referred to, a team leader can accept the referral in order to start service immediately or accept the referral to waitlist.

Or in list view, select the expanding arrows to the left.

The expanded information will provide, in addition to what was already visible, the NAPS Service ID that the referral was issued to, any referral comments made by the assessor or contact centre, and whether or not the client has multiple referrals for additional service types to your outlet.

You may decide to accept, reject or waitlist referrals based on the information available on the referral card.

However, if you want to see more client information prior to accepting a referral, select 'View referral summary and client record' to view details of the referral, the client's assessment and assessment outcomes and more detailed information about the client.

! The detailed referral view will also display the recommended frequency and intensity of recommended CHSP services. This is a recommendation only, to assist providers when discussing service options with the client.

This information is also available in the 'Services' and 'Referrals for my Organisation' tabs in the client record.

2. If you select 'View referral summary and client record', the 'Referrals for my organisation' screen will display. Any referrals issued to your organisation for the client will be displayed.

3. You can view the following information in the client details tab:

- Personal information
- Primary contact person
- Identity information and status of identity check
- Communication requirements
- Address detail (Suburb, State/Territory and postcode only)
- Payment details
- Health insurance details
- Service information
- Current notes
- A "Notify My Aged Care of Death" button
- You can view the following information on the other tabs of the client record:
  - Client Summary
  - Referrals
  - Attachments
  - Approvals under the Act
  - Services in place
  - Tasks and notifications for that client
  - My Aged Care interactions
  - Current and previous assessment and support plan review information

To accept the referral, refer to Accepting a Referral.

To reject the referral, refer to Rejecting a Referral.

To accept the referral to waitlist, refer to Accepting a Referral to Waitlist.

The Service and Support Portal User Guide – The Client Record contains further information about navigating the client record and what information can be viewed.

! Client contact details and full address details can only be viewed once a referral has been accepted.

Accepting a Referral

1. To accept the referral, select 'Accept referral' from the 'Referral summary' page or from the expanded card or list view in incoming referrals tab.

Accepting Referral from Referral Summary

Accepting Referral from Incoming Referrals Tab (Card View)

2. Select the correct service item name/NAPS Service ID (if your organisational has more than one service/NAPS ID available for the service type) you wish to link the referral to. Confirm that you want to accept the referral by selecting 'Accept'.

A confirmation banner will appear at the bottom of your screen confirming your acceptance of the referral and advising that the referral, and access to the client's full record including complete address and contact information, will be available through the 'Accepted services pending' tab.
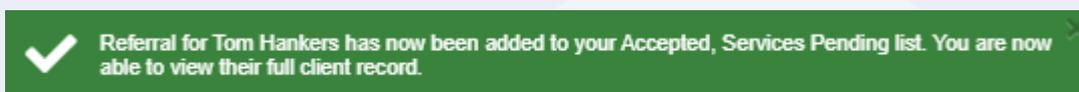
! Once a referral has been accepted, service delivery information must be provided within the priority status timeframes.

Rejecting a Referral

1. To reject the referral, select 'Reject referral' located next to 'Accept referral' on the referral card or 'Referral summary' page.

Rejecting Referral from the Referral Summary Page

Rejecting Referral from Incoming Referrals Tab (Card View)

2. You will be asked to select a reason for rejecting the referral from the drop down list. You may also elect to enter additional information in the 'Rejection reason' free text field. If a client has passed away during an assessment period, Team Leaders will need to select "Client deceased" from the drop-down list.

3. You will be redirected to the "Reject referral" screen and will need to enter the following information:

- Who, when and how you were informed that this person is deceased. For example, "Mrs Smith rang to inform us that Mr Smith has passed away on Saturday"
- Date of Death (if known)
- Add Attachments, for example Death Certificate, Hospital Discharge documents
- Enter additional information in the 'Rejection reason' free text field (not mandatory).

Example Reject Referral Form for Reason "Client Deceased'

Reject referral for Alanis Freddie ✕

All fields marked with an asterisk (*) are required.
You are about to reject the referral for Alanis Freddie (Referral ID#2-ZTVM07E).

Reason for rejecting *
Client deceased ▾

You are about to notify the department that Alanis Freddie has passed away. Their record will become read only. You will still be able to finalise outstanding assessments and support plan reviews, and add notes and attachments.

Please supply the following information:

Who, when and how were you informed that this person is deceased? * ❓

0 / 500

Date of death
(if known)   🗓

dd/mm/yyyy

Add Attachments
You can upload files up to 5 MB to this record. The following file types are accepted:
.jpeg, .jpg, .bmp, .png, .docx, .xlsx, .pdf, .rtf, .txt
(if available)

⬆ Choose a file…

Rejection reason:

0 / 500

REJECT   CANCEL

! Rejecting a referral with the reason of 'Client deceased' will change the client's status to 'Deceased' and make the client record read only. The provider can add notes and attachments to the client record for 14 days after ceasing services for their client. Any unaccepted service referrals will be recalled, services in place will be ceased, assessments will be cancelled and the client's access to the My Aged Care Online Account will be revoked. My Aged Care will not send correspondence to the client or their support network after the status is changed to 'Deceased'.

Comments regarding the 'Rejection reason' are displayed in the Assessor portal but not in the client's Online Account. Providing a rejection reason assists assessors and the My Aged Care contact centre to support clients in accessing services.

Upon rejection, a confirmation banner will appear at the bottom of the screen.

✓ Referral for Alanis Freddie (Torrance) has been rejected and removed from your waitlist.
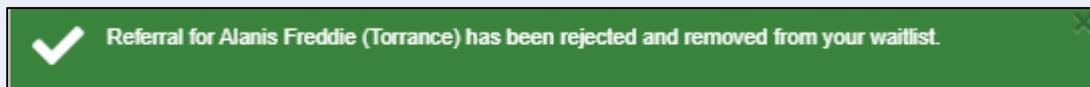
! If you do not have capacity to provide the service type, your Administrator should update your service availability and information in the portal. This process is described in the *Adding service items* section of the Service and Support Portal User Guide Part 1 – Administrator Functions.

4. If you are unable to provide the service at the time and you have a waitlist available, you can accept the referral to your waitlist. The referral will appear in your outlet's 'Waitlist' tab. The waitlist process is described in more detail in section 2.4 (How do I accept an electronic referral to waitlist?) on page 13 of this guide.

This option is only available if the service is configured by your Administrator to offer waitlist.

VIEW FULL CLIENT RECORD   ACCEPT REFERRAL   ACCEPT TO WAITLIST   REJECT REFERRAL

Revoking a Referral After Acceptance

There may be circumstances after you have accepted a referral for service that affect your ability to provide services to that client. For example, the client withdraws their consent for service provision or their circumstances change.

You can only revoke accepted referrals where service delivery information has not been entered and/or services haven't commenced.

The Department will monitor the use of this functionality, and notifications will be sent to service providers where 20% or more of referrals issued to the outlet over a period of 12 months have been revoked after acceptance.

To revoke a referral after acceptance, follow the steps below.

1. Navigate to the 'Accepted services pending' tab in the 'Service referrals' section of the provider portal and locate the accepted referral that you wish to revoke. You are able to filter the results by expanding the 'Filter' functionality, sort the results by editing the sort order and selecting 'Go', or change the display of information between 'Card' or 'List' views.
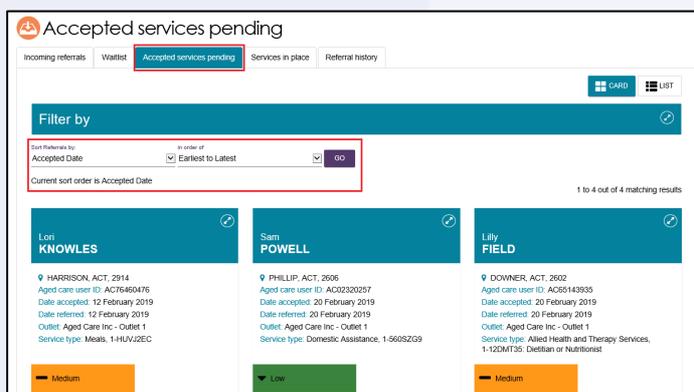
2. Select the accepted referral you wish to revoke and expand the information. You are then able to select 'Revoke Referral'.

Sam POWELL

Aged 97 (2 February 1922), Male   PHILLIP, ACT, 2606

Client contact details   **About this service**

Preferred contact number   Not specified   Service type   Domestic Assistance

About this referral   Service sub type   No sub types

Date issued   20 February 2019   Service item name   Domestic Assistance

Date accepted   20 February 2019   Naps service Id   1-560SZG9

Outlet   Aged Care Inc - Outlet 1   Recommended service frequency   2 days per week

Referral comments   No referral comments provided

Multiple referrals are available for this client

[VIEW REFERRAL SUMMARY AND CLIENT RECORD]   [VIEW PDF OF CLIENT RECORD]

[REQUEST A REVIEW]   [REVOKE REFERRAL]   [ADD SERVICE INFORMATION]

3. Select the reason for revocation from the drop down menu and enter detailed information in the Comments section to explain why you are revoking the referral after acceptance. Select 'Revoke referral'.

Revoke Sam Powell referral

⚠ You should only accept a referral for service where you intend to provide services to a client. If the circumstances have changed and you're no longer able to provide services to a client, then you can revoke the accepted referral once you've provided a reason.

Please note that the department monitors revoked referrals as they have a direct impact on the timely delivery of aged care services to clients.

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

Please select a reason for revocation after acceptance (*)

Reason for revocation after acceptance *

Select one
Client deceased
Client withdrew
Unable to deliver service
Other

0 / 500

[REVOKE REFERRAL]   [CANCEL]

4. You will receive confirmation that the referral has been revoked, and it will no longer appear in your 'Accepted services pending' tab.

✔ You have successfully revoked this referral after acceptance for Sam Powell.

! When a referral is revoked after acceptance, other referrals (such as from a broadcast or preference referral) will be automatically issued.

Revoking a Referral with Reason 'Client Deceased'

Revoking a referral with the reason of 'Client deceased' will change the client's status to 'Deceased' and make the client record read-only. Any unaccepted service referrals will be recalled, services in place will be ceased, assessments will be cancelled and the client's access to the My Aged Care Online Account will be revoked. My Aged Care will not send correspondence to the client or their support network after the status is changed to 'Deceased'.

Where a client is active in the Home Care Package national priority system or has been assigned a home care package, updating the client to deceased will remove the client from the national priority system and withdraw any assigned home care packages.

When the "Client deceased" option is selected, you will be prompted to enter the following details:

- Who, when and how you were informed that this person is deceased. For example "Mrs. Smith rang to inform us that Mr. Smith passsed away on Saturday".
- Date of death (if known)
- Attachments to be added. For example Death certificate, hospital discharge doccuments.

Accepting a Referral to Waitlist

If a service provider chooses to turn on the waitlist function in the provider portal, they will be able to accept electronic referrals to a waitlist. Accepting a referral to waitlist allows a client to be placed on a waitlist for a particular service until the service becomes available.

To accept waitlist referrals, the Administrator for your organisation must ensure that 'Waitlist availability' for specific services is set to 'On'. This procedure is described on page 24 of the *Service and Support Portal User Guide - Create Service Delivery outlets and add Service information.*

1. Navigate to the 'Service referrals' page and view the 'Incoming referrals' tab.

2. Expand the client's information in either the card or list view, and select 'Accept to Waitlist'.

3. Select 'Accept'.
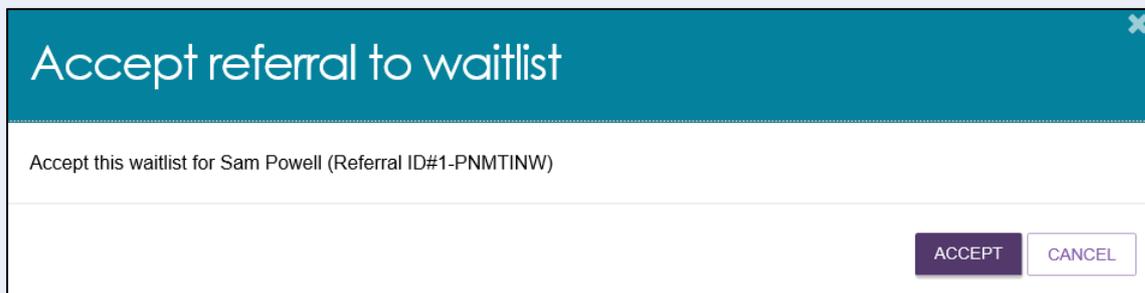
The referral will now appear in the 'Waitlist' tab in the 'Service referrals' page.
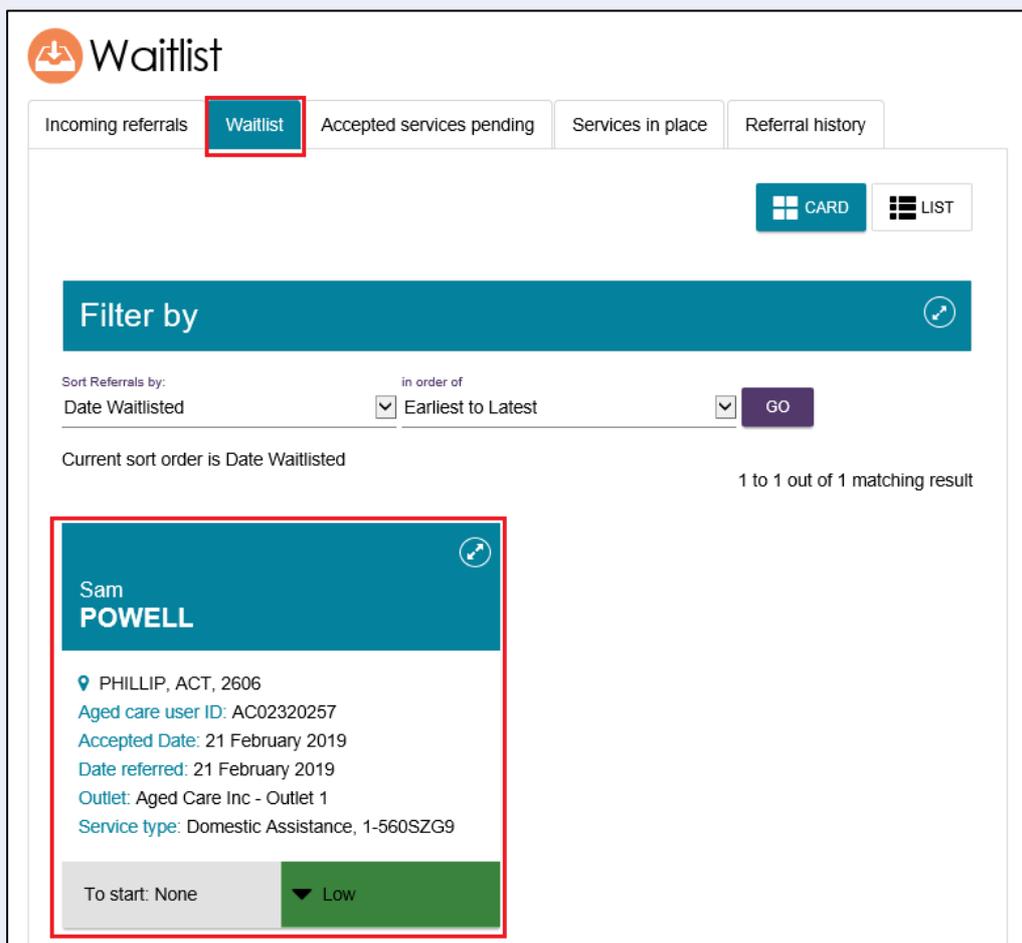
Retrieving a Referral Code

A client may choose to be issued with a referral code by assessors or My Aged Care contact centre staff. A referral code allows clients to visit different service providers to discuss their needs prior to choosing their preferred provider. If a service provider Team Leader has been given a referral code, they should follow the procedure below to retrieve the referral.

1. From the homepage select 'Retrieve a referral code'.
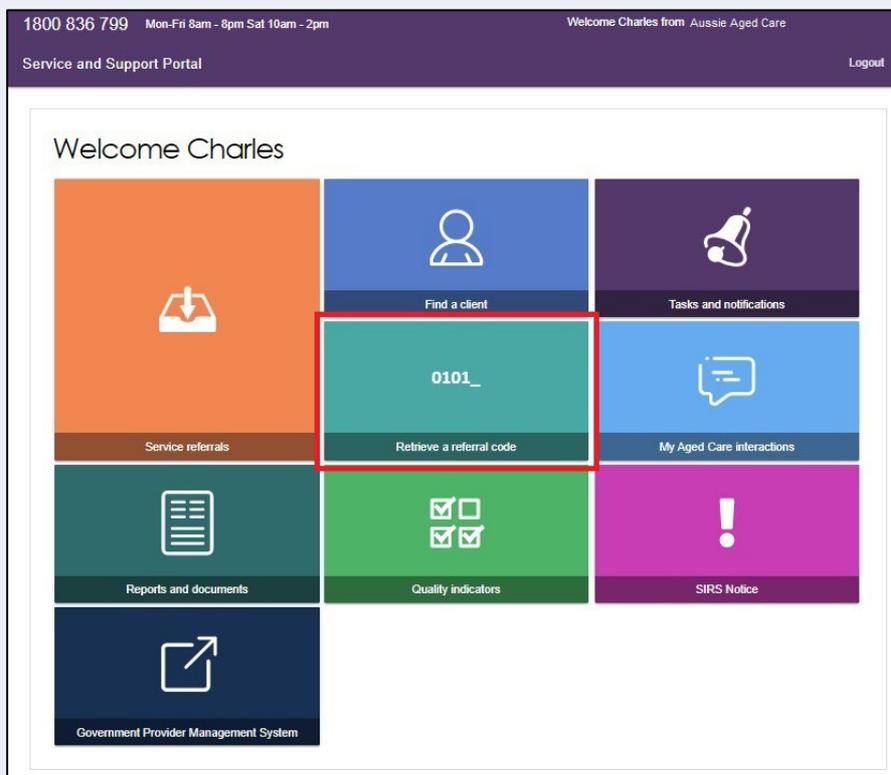
Alternatively, from any other page you can select 'Retrieve a referral code' from the toolbar displayed at the top right corner of the portal.

2. Enter the client's referral code and select the outlet in which services will be provided from. Then select 'Retrieve referral'.

If you are a team leader at the organisation, select the outlet you wish to refer the client to. Outlet team leaders will not have this option.

Retrieve referral code

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

Referral code: *

Outlet: *

RETRIEVE REFERRAL CANCEL

3. A confirmation message will display confirming the successful retrieval of the referral, and the referral will be added to your 'Incoming referrals' tab within the 'Service referrals' tile.

Incoming referrals

| Incoming referrals | Waitlist | Accepted services pending | Services in place | Referral history |

4. You will be directed to the 'Incoming referrals' page where you can view details of the referral. Depending on client preferences, and your capacity to provide services, you can either:

- accept or reject the referral for service(s);
- accept the referral to waitlist; or
- revoke the referral after acceptance.

! It is critical that you review the referral and client information and that you have decided to provide services to the client prior to accepting the referral.

Only accept the referral if both the provider and client agree to commence services.

! A referral code will need to be reactivated if it has previously been accepted by another provider, a previously commenced service has ceased, or the time limited approval has lapsed.

Clients and their representatives can now manage their referral codes via their My Aged Care Online Account.

! **Home Care Packages**

If you are a Home Care Package provider and encounter a client who would like to change their provider, they can reactivate their referral code via the My Aged Care Online Account. For further information, refer the client to the Access Your Online Account website or call the My Aged Care contact centre on 1800 200 422.

Referrals for Home Care Packages will only be issued, usually via the provision of a referral code to the client, once a package has been assigned. Providers should not use the 'take up deadline' by which they must have commenced services with a client for Home Care Packages or else the assigned package will be withdrawn.

Drawing a Client into Service from a Waitlist

When a service becomes available for a corresponding referral in your waitlist, you can draw the client into service and commence service delivery.

Clients may be on a number of waitlists with other providers at any one time. If a service becomes available, and the client is 'Drawn down into service', the client will be removed from all other provider waitlists for that same service type.

1. Navigate to the 'Waitlist' tab in the 'Service referrals' tile of the Service and Support Portal.

Referrals that have been accepted to waitlist will be displayed here.
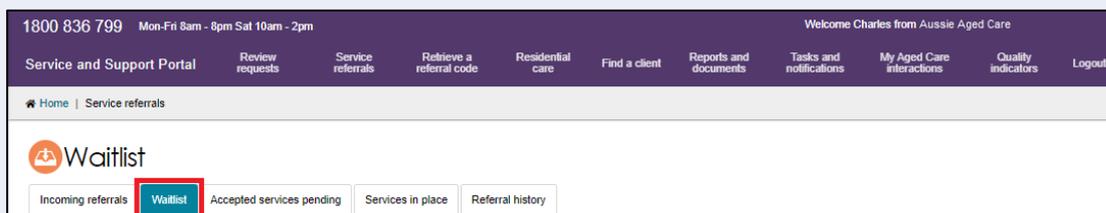
2. Find the client referral that you want to accept to service and expand the client's information by selecting the arrows on the card or list view. You are able to filter the results by expanding the 'Filter' functionality, sort the results by editing the sort order and selecting 'Go', or change the display of information between 'Card' or 'List' views.

! Prior to drawing down a client into service, be sure to review the referral summary and client record to confirm that you are still able to provide this service to the client.

Select 'Draw down into service'.
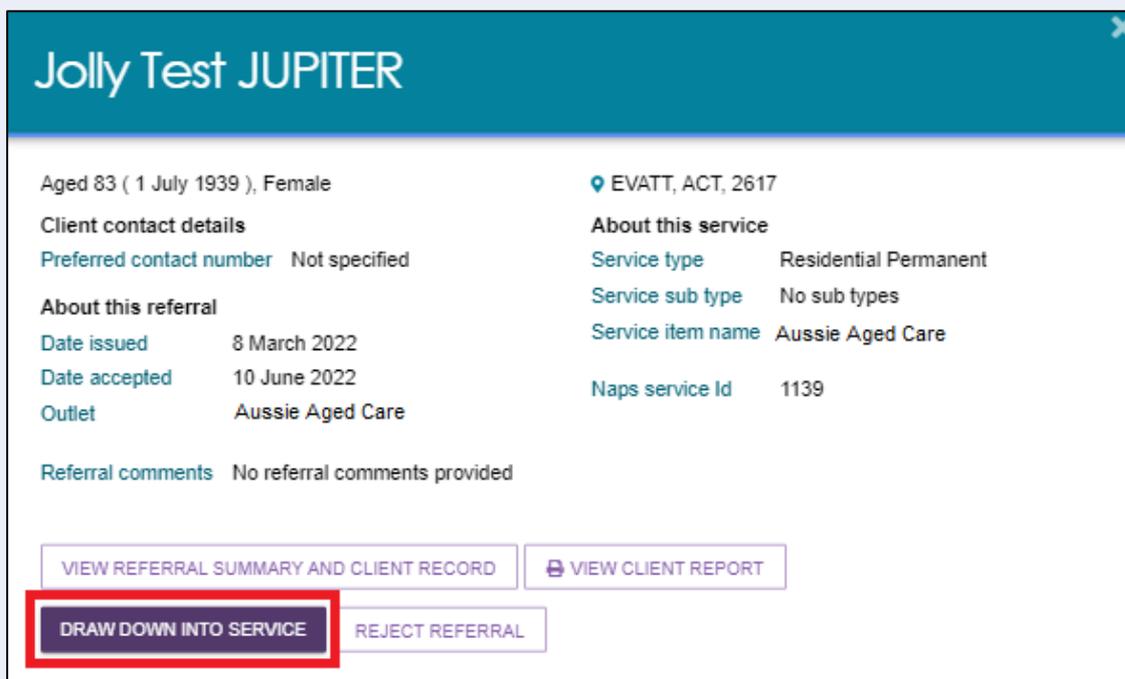
3. Select the correct service item name/NAPS Service ID (if your organisational has more than one service/NAPS ID available for a service type) you wish to link the referral to. Confirm that you want to accept the referral by selecting 'Accept'.

A confirmation message will appear confirming the acceptance of the referral. The referral has now been accepted into service and the client's referral will now appear in the 'Accepted services pending' tab until service delivery information is recorded for the service.

4. To reject a referral that is on your waitlist, select 'Reject referral' and a reason for rejection, then select 'Reject'. Providing a rejection reason assists assessors and the My Aged Care contact centre to support clients in accessing services.

The referral will be removed from your waitlist and will no longer be visible in the Service and Support Portal.

Notifications for Overdue Referrals

Team Leaders will see visual indicators in their incoming referral tab for referrals that have not been actioned (accepted, rejected or waitlisted) within priority timeframes.

An email will also be sent to the email address connected to the outlet prompting them to action the referrals. These notifications will also display in the 'Tasks and notifications' section of the provider portal, displaying as 'Overdue referral' tasks.

Referral History

The 'Referral history' tab allows service provider Team Leaders and Staff Members to view referral history, including information on whether a referral was revoked or recalled.

Detailed referral information is available by selecting the arrow to the left or right of the referral (in list view or card view, respectively).

Referral Priority Status

Incoming service referrals are assigned a priority status (low, medium, high) based on a client's level of function, the level of risk in relation to the care situation, and any other concerns that are relevant to the client's circumstances identified during the screening or assessment process.

Service providers are required to action referrals (accept, reject or waitlist) within 3 calendar days of receiving an electronic referral for service or electronic referral for waitlist.

! Home Care Package approvals will not display a service priority.

More Information and Support

Further information is available from the *My Aged Care Service and Support Portal Resources* webpage.

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