



# 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.

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## 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](#).

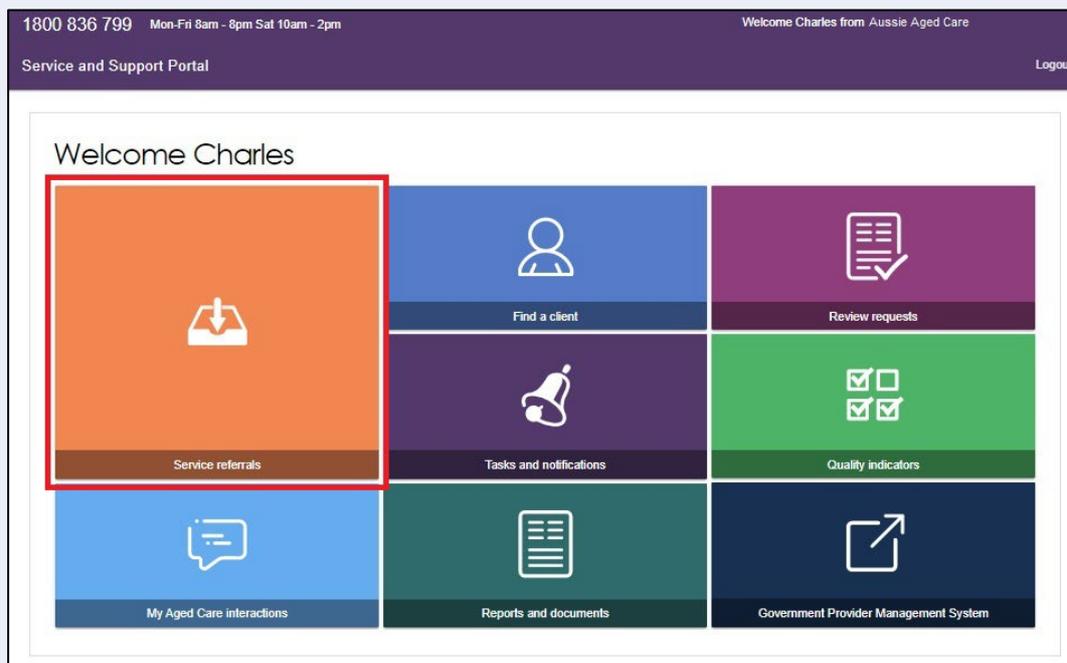
**!** All clients with existing approvals should be registered in My Aged Care. Please contact the My Aged Care Assessor and Service Provider helpline on 1800 836 799 for further assistance.

## 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.



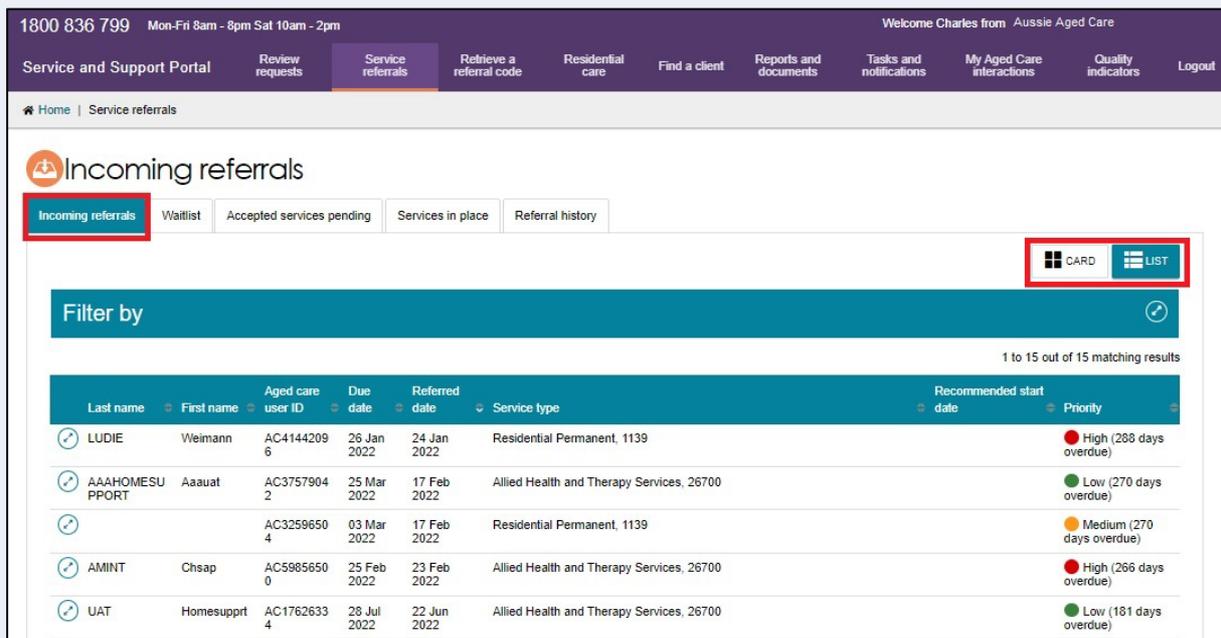
Alternatively, from any other page in the Service and Support portal, you can choose the 'Service referrals' option from the tool bar displayed at the top of the portal.

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.

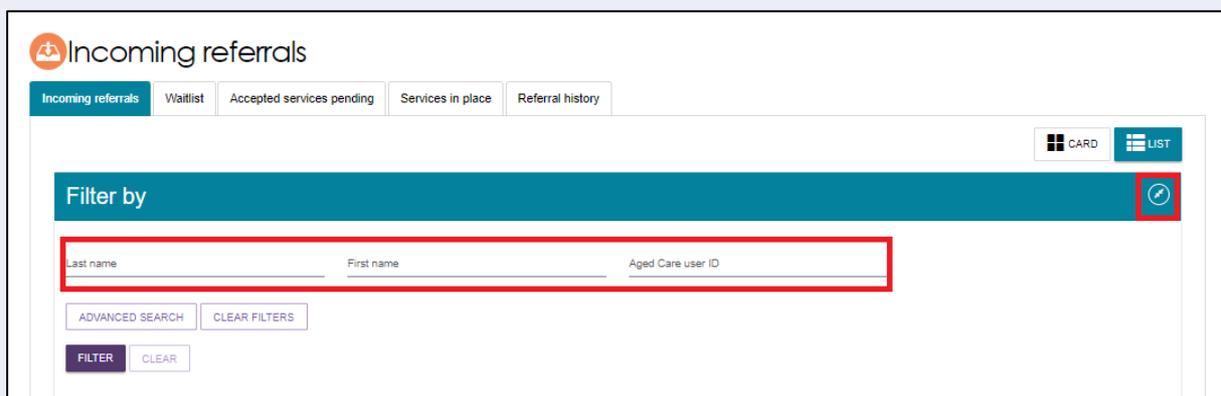


2. The 'Incoming referrals' page will now display a list of incoming referrals (those that have not been actioned).

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.



**Search incoming referrals**

Some referrals have overdue SLAs and need to be actioned.

Incoming referrals

Choose an item. **ADD FILTER** **SAVE FILTER** **CLEAR FILTER**

- Choose an item.
- Aged Care user ID
- Due date
- First name
- Last name
- Locality
- Outlet
- Postcode
- Priority
- Recommended start date
- Referred date
- Service type
- State
- Suburb

**FILTER** **CANCEL**

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'.

**Search incoming referrals**

Incoming referrals

**ADD FILTER** **SAVE FILTER** **CLEAR FILTER**

2 of 7 filters used

Last name **Postcode**

**FILTER** **CANCEL**

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

The screenshot shows the 'Incoming referrals' section of a web application. At the top, there are tabs for 'Incoming referrals', 'Waitlist', 'Accepted services pending', 'Services in place', and 'Referral history'. Below the tabs is a 'Filter by' search bar. Underneath the search bar, there is a sorting section with a red box highlighting the 'Sort Referrals by:' dropdown menu. The dropdown is currently set to 'Date Referred' and 'in order of' is set to 'Earliest to Latest'. A 'GO' button is next to the dropdown. Below the dropdown, it says 'Current sort order is Date Referred'. To the right of the search bar, there are 'CARD' and 'LIST' view toggle buttons.

## 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.

The screenshot shows two referral cards in the 'Incoming referrals' section. The first card is for Sam POWELL, located in PHILLIP, ACT, 2606. It shows the aged care user ID as AC02320257, the date referred as 20 February 2019, and the due date as 28 March 2019. The outlet is Aged Care Inc - Outlet 1, and the service type is Allied Health and Therapy Services, 1-12DMT35. The priority is Low. The second card is for Collin BRADINGTON, located in LYNEHAM, ACT, 2602. It shows the aged care user ID as AC91778241, the date referred as 14 February 2019, and the due date as 22 March 2019. The outlet is Aged Care Inc - Outlet 1, and the service type is Allied Health and Therapy Services, 1-12DMT35. The priority is Low (2 days overdue). Both cards have an expanding arrow icon in the top right corner.

**!** 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.

**Incoming referrals**

Waitlist Accepted services pending Services in place Referral history

CARD LIST

Filter by

1 to 2 out of 2 matching results

Last name	First name	Aged care user ID	Due date	Referred date	Service type	Recommended start date	Priority
POWELL	Sam	AC02320257	28 Mar 2019	20 Feb 2019	Allied Health and Therapy Services, 1-12DMT35		Low
BRADDINGTON	Collin	AC91778241	22 Mar 2019	14 Feb 2019	Allied Health and Therapy Services, 1-12DMT35		Low (2 days overdue)

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.

**Tom HANKERS**

Aged 74 ( 1 September 1948 ), Male

HAWKER, ACT, 2614

**About this referral**

Outlet Aussie Aged Care

Date referred 22 February 2023

Date due 8 March 2023

Referral comments No referral comments provided

Multiple referrals are available for this client

**About this service**

Service type Domestic Assistance

Service sub type General House Cleaning

Service item name Community and Home Support

Naps service Id 26700

VIEW REFERRAL SUMMARY AND CLIENT RECORD

ACCEPT REFERRAL REJECT REFERRAL

! 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.

The screenshot shows the 'Service and Support Portal' for Mr Tom HANKERS. The top navigation bar includes options like 'Review requests', 'Service referrals', and 'Residential care'. The main content area is titled 'Referral summary for Tom Hankers' and features a tabbed interface with 'Referrals for my organisation' selected. Two referral cards are visible, each for 'Domestic Assistance' with a 'Priority Medium' status. Each card has 'ACCEPT REFERRAL' and 'REJECT REFERRAL' buttons. The referral details show an issued date of 22 February 2023 and a due date of 8 March 2023.

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.



1800 836 799 Mon-Fri 8am - 8pm Sat 10am - 2pm Welcome Charles from MyAged Care

Service and Support Portal [Review requests](#) [Service referrals](#) [Relieve a referral code](#) [Residential care](#) [Find a client](#) [Reports and documents](#) [Tasks and notifications](#) [My Aged Care interactions](#) [Quality indicators](#) [Logout](#)

Home | Service referrals | Tom HANKERS

Mr Tom HANKERS  
Male, 74 years old, 1 September 1948, ACS2435179  
HANKER, ACT, 2614  
Primary contact: Tom Hankers (self) - 02 5656 8585  
No support relationships recorded

**Client details**

The client has not yet completed a wallet check.  
Conduct a wallet check now  
Please remind Tom Hankers to verify their mobile phone number when you see them next.

Client summary **Client details** [Referrals for my organisation](#) [Plans](#) [Attachments](#) [Approvals](#) [Services](#) [My Aged Care interactions](#) [Notes](#) [Tasks and Notifications](#)

Residential Care

**About Tom** [NOTIFY MY AGED CARE OF A DEATH](#)

**Personal information**  
Born 1 September 1948, Angolan, born in Australia, never married, lives alone  
Status: Active

**Primary Contact**  
This is who My Aged Care will contact first  
Tom HANKERS (self)

**Communication requirements**  
• Prefer to speak English

**Address details**  
Home address  
HANKER, ACT, 2614  
Service delivery address  
HANKER, ACT, 2614  
Send any correspondence to  
HANKER, ACT, 2614

**Identity documents (ID)**  
Aged Care ID: ACS2435179  
Identity Status  
Identity match status: Not Attempted  
Wallet check status: Not Attempted  
Client association status: Not Attempted

**Payment details**  
Receiving payments  
No payments found

**Health insurance**  
Private health insurance  
No health insurance found

**Service information**  
The following information is from the Department of Human Services claims system. It may take up to a month to be updated.

Current notes [+](#)

Support plan [+](#)

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

## Accepting a Referral

- 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

Referral summary for Tom Hankers

Client summary [Client details](#) **Referrals for my organisation** [Plans](#) [Attachments](#) [Approvals](#) [Services](#) [My Aged Care interactions](#) [Notes](#) [Tasks and Notifications](#)

Residential Care

**Referrals for my organisation**

**Domestic Assistance:** [ACCEPT REFERRAL](#) [REJECT REFERRAL](#)

About this referral  
Issued Date 22 February 2023  
Due Date 8 March 2023  
Priority Medium

**Domestic Assistance:** [ACCEPT REFERRAL](#) [REJECT REFERRAL](#)

About this referral  
Issued Date 22 February 2023  
Due Date 8 March 2023  
Priority Medium



## Accepting Referral from Incoming Referrals Tab (Card View)

### Tom HANKERS

Aged 74 ( 1 September 1948 ), Male HAWKER, ACT, 2614

**About this referral**

Outlet: Aussie Aged Care

Date referred: 22 February 2023

Date due: 8 March 2023

Referral comments: No referral comments provided

Multiple referrals are available for this client

**About this service**

Service type: Domestic Assistance

Service sub type: General House Cleaning

Service item name: Community and Home Support

Naps service Id: 26700

[VIEW REFERRAL SUMMARY AND CLIENT RECORD](#)

[ACCEPT REFERRAL](#) [REJECT REFERRAL](#)

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'.

### Accept this referral for Tom Hankers

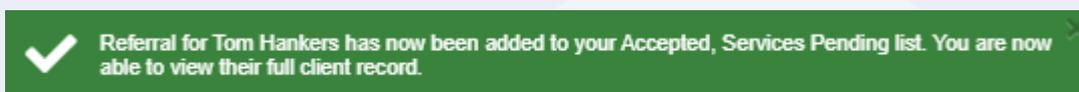
Accept this referral for Tom Hankers (Referral ID#2-ZTTQ13K)

Select service item ?

Service Type	NAPS ID	Service Name
<input checked="" type="radio"/> Domestic Assistance	26700	Yass Valley Aged Care Limited - Community and Home Support

[ACCEPT](#) [CANCEL](#)

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

Referral summary for Alanis Freddie

Client summary Client details **Referrals for my organisation** Plans Attachments Approvals Services My Aged Care interactions Notes Tasks and Notifications

Residential Care

Referrals for my organisation

ACCEPT REFERRAL REJECT REFERRAL

Allied Health and Therapy Services:

About this referral	About this service
Issued Date 1 March 2023	Recommended service frequency 2 days per week
Due Date 15 March 2023	

Priority Medium

### Rejecting Referral from Incoming Referrals Tab (Card View)

Alanis (Torrance) FREDDIE

Aged 90 ( 15 February 1933 ), Male ZILLMERE, QLD, 4034

About this referral

Outlet Aussie Aged Care

Date referred 1 March 2023

Date due 15 March 2023

Referral comments No referral comments provided

About this service

Service type Allied Health and Therapy Services

Service sub type Dietitian or Nutritionist, Physiotherapy, Occupational Therapy, Social Work, Restorative Care Services

Service item name Community and Home Support

Naps service Id 26700

Recommended service frequency 2 days per week

VIEW REFERRAL SUMMARY AND CLIENT RECORD

ACCEPT REFERRAL REJECT REFERRAL

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.

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 \*

Select one

Select one

- Client in respite/hospital
- Client ineligible
- Client uncontactable
- Outside service region
- Referral made in error
- Insufficient capacity
- No one accredited
- Conflict of interest
- Other
- Further info to be added
- Service no longer required
- Client deceased
- Unable to process referral

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:

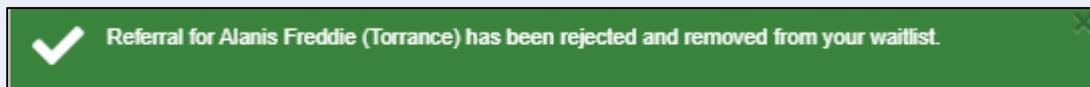
0 / 500

**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.



**!** 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.



## Revoking a Referral After Acceptance

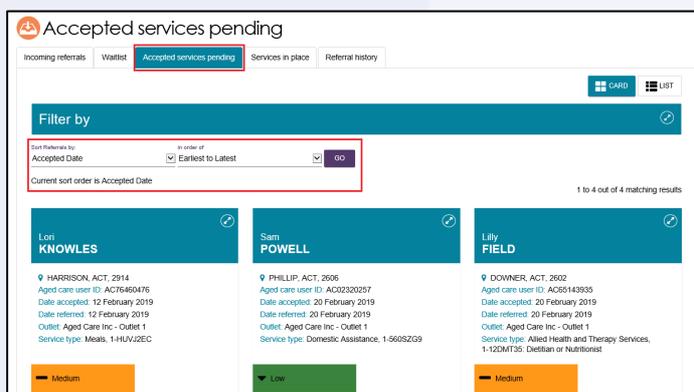
There may be circumstances after you have accepted a referral for service that affect your ability to provide services to that client. For example, the client withdraws their consent for service provision or their circumstances change.

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

<b>Client contact details</b>	<b>About this service</b>
Preferred contact number Not specified	Service type Domestic Assistance
<b>About this referral</b>	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.

**Recording a service end date**  
Entering a service end date will end this service for your client at that date. If you need to reinstate this service after that date, please call the Contact Centre on 1800 836 799.

Service end date  
22/09/2020

Reason for cessation of service \*  
Client deceased

Add a reason for changes or other comments  
For example, 'frequency was changed because client condition has deteriorated'.

Maximum 255 characters

SAVE CHANGES CANCEL

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 passed away on Saturday".
- Date of death (if known)
- Attachments to be added. For example Death certificate, hospital discharge documents.

**Recording a service end date**  
Entering a service end date will end this service for your client at that date. If you need to reinstate this service after that date, please call the Contact Centre on 1800 836 799.

Service end date  
30/09/2020

Reason for cessation of service \*  
Client deceased

**You are about to notify the department that TST A Costa 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? ?

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)

SAVE CHANGES CANCEL

## Accepting a Referral to Waitlist

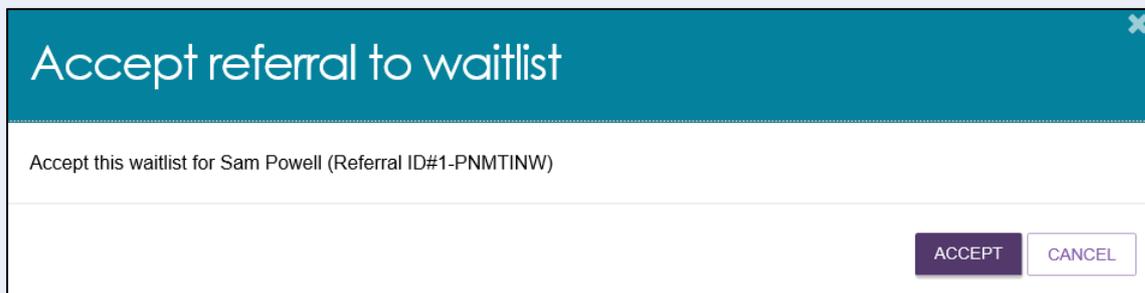
If a service provider chooses to turn on the waitlist function in the provider portal, they will be able to accept electronic referrals to a waitlist. Accepting a referral to waitlist allows a client to be placed on a waitlist for a particular service until the service becomes available.

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](#).

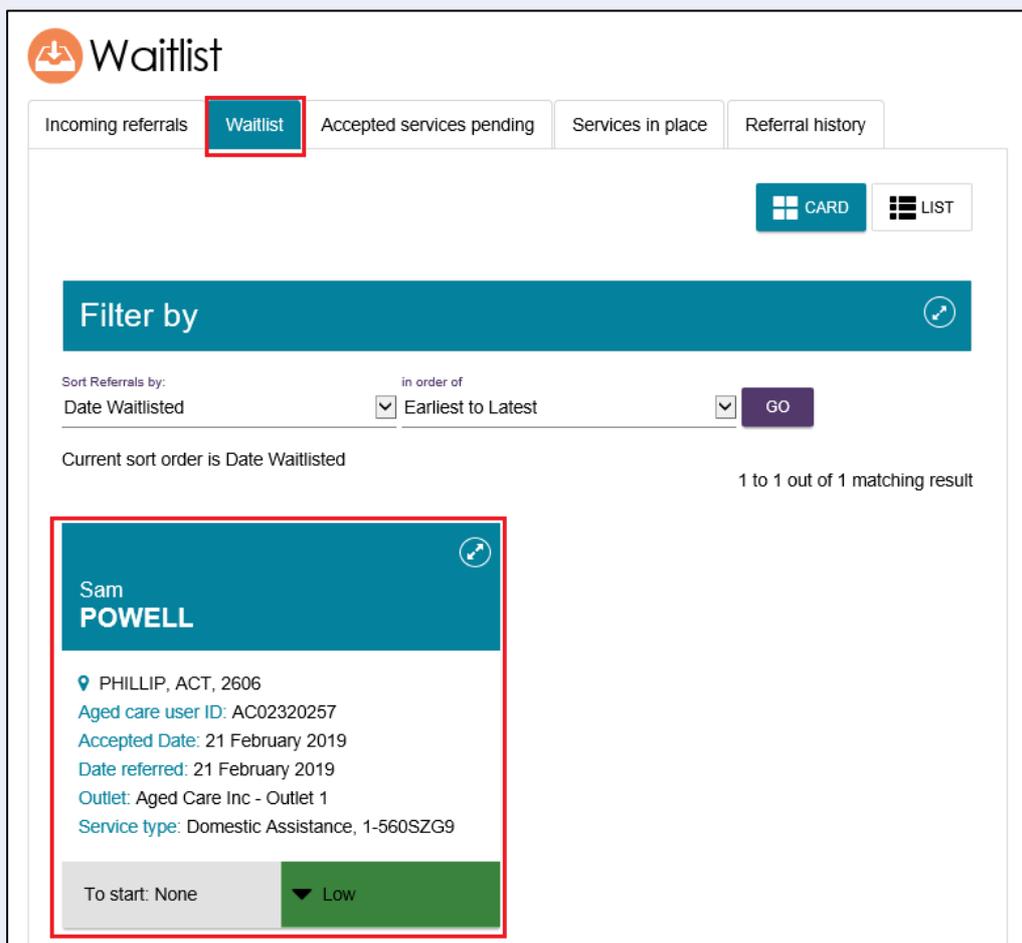
1. Navigate to the 'Service referrals' page and view the 'Incoming referrals' tab.
2. Expand the client's information in either the card or list view, and select 'Accept to Waitlist'.



3. Select 'Accept'.



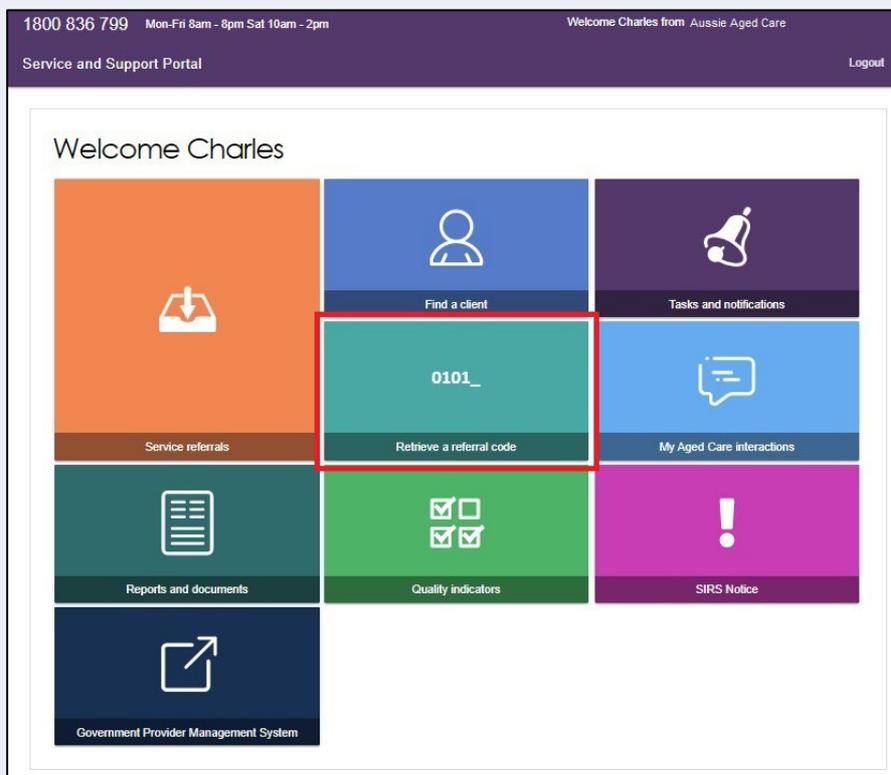
The referral will now appear in the 'Waitlist' tab in the 'Service referrals' page.



## 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.

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.

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.

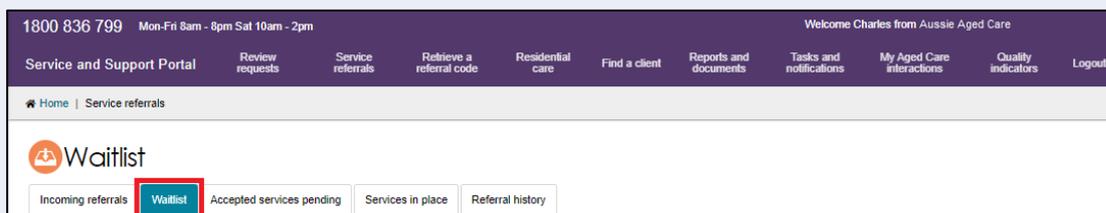
## Drawing a Client into Service from a Waitlist

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.

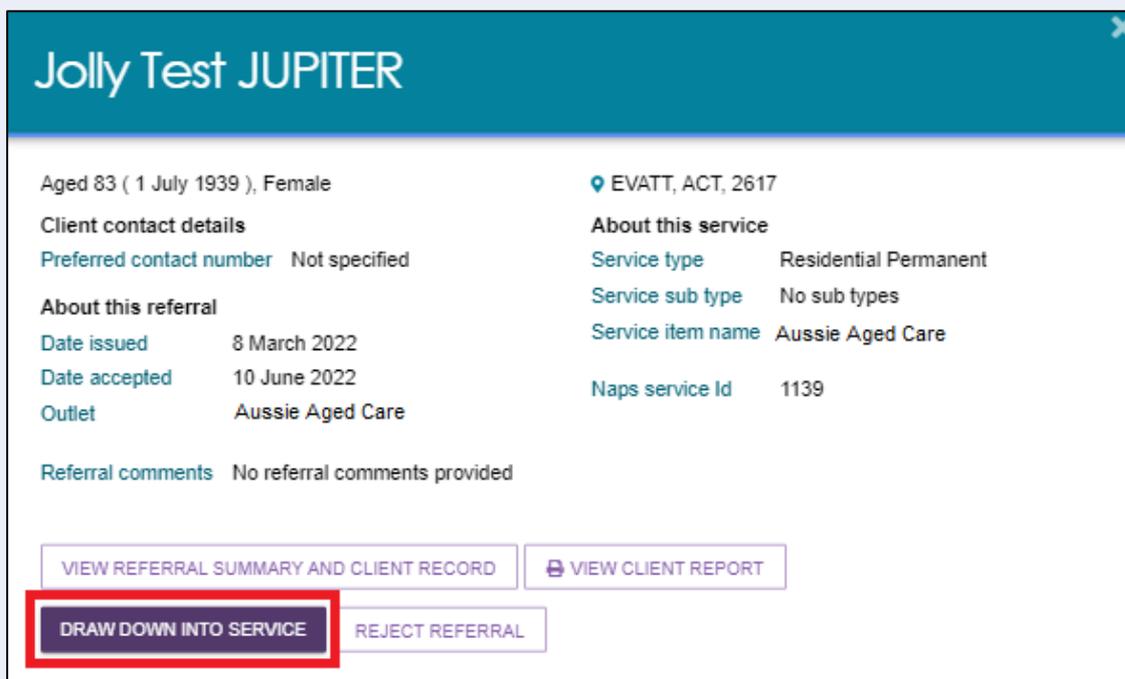
Referrals that have been accepted to waitlist will be displayed here.



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'.

### Draw down into service for Jolly Test Jupiter

Draw down into service for Jolly Test Jupiter (Referral ID#2-ZNVTS7C)

Select service item ?

Service Type	NAPS ID	Service Name
<input checked="" type="radio"/> Residential Permanent	1139	Aussie Aged Care

ACCEPT
CANCEL

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.

## Accepted services pending

Incoming referrals
Waitlist
Accepted services pending
Services in place
Referral history

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.

## Tara SUMMER

Aged 78 ( 1 July 1939 ), Female

**Client contact details**  
Preferred contact number 0411 899 636

**About this referral**  
Date issued 22 May 2018  
Date accepted 11 June 2018  
Outlet Aged Care Inc - Outlet 1  
Referral comments No referral comments provided

FRANKLIN, ACT, 2913

**About this service**  
Service type Allied Health and Therapy Services  
Service sub type Podiatry  
Service item name Allied Health and Therapy Services - At Client Location  
Naps service id 7765  
Recommended start date 1 June 2018

VIEW REFERRAL SUMMARY AND CLIENT RECORD
VIEW PDF OF CLIENT RECORD

DRAW DOWN INTO SERVICE
REJECT REFERRAL

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.

**Incoming referrals**

**Smita WINTER**

📍 DUNLOP, ACT, 2615  
Aged Care ID: AC64715667  
Date referred: 12 July 2017  
Due date: 26 July 2017  
Outlet: Aged Care Allied Health & Residential  
Service type: Domestic Assistance, 8693: General House Cleaning

🚨 Medium (85 days overdue)

**Beryl (Everett) WARING**

📍 MERIMBULA, NSW, 2548  
Aged Care ID: AC84694512  
Date referred: 2 March 2017  
Due date: 16 March 2017  
Outlet: Aged Care Allied Health & Residential  
Service type: Flexible Respite, 8693: Other planned respite

🚨 Medium (179 days overdue)

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.

**Tasks and notifications**

Tasks Notifications Maximum HCP wait times

Filter by

Due Date	Category	Title/Description	Aged Care User ID	Client name	Activity Id
	Client Services	<b>Overdue Referral</b> A referral has not been actioned in the required priority timeframes. Please review the referral and action appropriately. Assigned to: FOLIO, Alford Go to: <a href="#">Client Services</a>	<a href="#">AC77564987</a>	GAYNELLE Ina	1-30746437924

## 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).



**Filter by**

Sort Referrals by:  Date Referred  Latest to Earliest  in order of  GO

Current sort order is Date Referred

**Recalled**

**Stella MARY**

FRANKLIN, ACT, 2913  
 Aged care user ID: AC57603433  
 Date referred: 21 February 2019  
 Date recalled: 21 February 2019  
 Outlet: Aged Care Inc - Outlet 1  
 Service type: Allied Health and Therapy Services, 1-12DMT35: Dietitian or Nutritionist

! Recalled Low

**Revoked after acceptance**

**Sam POWELL**

PHILLIP, ACT, 2606  
 Aged care user ID: AC02320257  
 Date referred: 20 February 2019  
 Date accepted: 20 February 2019  
 Date revoked after acceptance: 21 February 2019  
 Outlet: Aged Care Inc - Outlet 1  
 Service type: Domestic Assistance, 1-560S2G9

! Revoked after acceptance Low

## 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.

