



Australian Government



myagedcare

# Service and Support Portal User Guide - Advanced outlet and service management: transferring clients and services

This guide is designed for:

- Administrators within the My Aged Care service and support portal
- Outlet Administrators who have access to more than one outlet.

This guide explains the procedures for transferring clients and services within and between outlets in an organisation.

This process will assist organisation administrators to restructure outlets set up for their organisation to meet their business needs.

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## Notes

- This document relates only to the functions able to be performed by an administrator at the organisation level.
- For home care, a client's package status will not be affected when they are transferred, but providers should still ensure that the NAPS Service ID matches the NAPS Service ID they submit for claims.
- This functionality does not apply to residential care services, and providers should use the existing process using the [Application to Vary Conditions of Allocation](#) form.
- For home care, if you are transferring services or clients to an outlet or service from or to another approved provider organisation e.g. as part of a merger or acquisition you should follow the process for [Transferring home care packages services](#) to another approved provider.
- If you are required to transfer clients between organisations, for example, as part of a merger or acquisition, contact the My Aged Care Service Provider and Assessor Helpline on 1800 836 799, who will be able to initiate the transfer of clients for you.

## Transferring between outlets

Organisation administrators may choose one or multiple service items to transfer between outlets of an organisation in the service and support portal. Using this function, administrators can:

- select and list the service item(s) you wish to transfer
- select an outlet to which you may transfer service item(s)
- generate and export a report listing service referrals linked to the service item(s).

**!** This functionality is not available for residential care (permanent and respite). Please follow the existing process using the Application to Vary Conditions of Allocation form.

**!** Only departmental staff can transfer client records linked to an inactive outlet to an active outlet in the same assessment organisation, or to another assessment organisation.

To transfer a service item between outlets, follow the steps below.



- Select the outlet you wish to transfer the service items to using the list provided. You can search for a specific outlet using the search function. Click 'Next' to continue.

**Transfer service inventory items**

Transfer from: Margery outlet

Search for an outlet or select from those below

Outlet name:

Outlet	Status	State	Contact name	Phone number
<input type="radio"/> Margery outlet	Active	VIC	Squire Seikaly	(02) 3928 4924
<input checked="" type="radio"/> Bernard Heinze outlet	Active	ACT	George Kelly	(02) 9876 5432

- Select the service item(s) that you want to transfer to another outlet. You can search for specific service items using the search functionality (by Programme or Service type).

Each service item contains the service type, NAPS service ID, service item name, funding state and funding region.

You can transfer up to a maximum of 25 service items.

Click 'Next' to proceed to the next screen. If you click on 'Cancel', you will exit the Transfer process and be re-directed to the 'View Outlet' screen.

**Transfer service inventory items**

Transfer from: Margery outlet to Bernard Heinze outlet

Services added to transfer: 0 (max 25)

Search for services or select from those below

Programme: Commonwealth Home Support Programme  Service type:

Service type	NAPS ID	Service item name	Funding state	Funding region
<input checked="" type="checkbox"/> Meals	2345	Margery CHSP Provider	VIC	Gippsland
<input type="checkbox"/> Domestic Assistance	2548	Margery CHSP provider	VIC	Gippsland
<input type="checkbox"/> Home maintenance	2548	Margery CHSP provider	VIC	Gippsland
<input type="checkbox"/> Transport	2548	Margery CHSP provider	VIC	Gippsland
<input type="checkbox"/> Other Food Services	2548	Margery CHSP provider	VIC	Gippsland
<input type="checkbox"/> Allied Health and Therapy Services	2548	Margery CHSP provider	VIC	Gippsland
<input type="checkbox"/> Meals	2548	Margery CHSP provider	VIC	Gippsland

- Review the information to ensure that it is correct. You may wish to change the Service Item name.
- To remove a service item, click the red bin icon. To cancel the transfer, click 'Cancel'.

**Transfer service inventory items**

Transfer from: Margery Cole outlet to Service Item Test

Services added to transfer: 2 (max 25)

Programme	Service type	NAPS service ID	Funding region	Funding state	Service item name	Revised service item name
CHSP	Domestic Assistance	2548	Gippsland	VIC	Margery CHSP provider	Service item name: <input type="text"/>
CHSP	Home modifications	2548	Gippsland	VIC	Margery CHSP provider	Service item name: <input type="text"/>

9. To review any clients that may be impacted by the transfer, you can generate an 'Impact report' before proceeding with the transfer.

To generate the impact report, select the 'Save Transfer and Generate Impact Report' button.

Once the report has generated, it will appear in the 'Reports and documents' tab for five days. You can review the report and resume the transfer at a later stage.

Programme	Service type	NAPS service ID	Funding region	Funding state	Service item name	Revised service item name
CHSP	Domestic Assistance	2548	Gippsland	VIC	Margery CHSP provider	Service item name: <input type="text"/>
CHSP	Home modifications	2548	Gippsland	VIC	Margery CHSP provider	Service item name: <input type="text"/>

The following banner will display:



The 'Transfer Impact Report' may, on occasion, take some time to generate. If this happens, an alert message will prompt on screen.

You can navigate away from the 'Transfer Service Inventory Items' screen and be notified when the 'Transfer Impact Report' completes.

Alternatively, you may choose to transfer service inventory items without reviewing the report at any time.

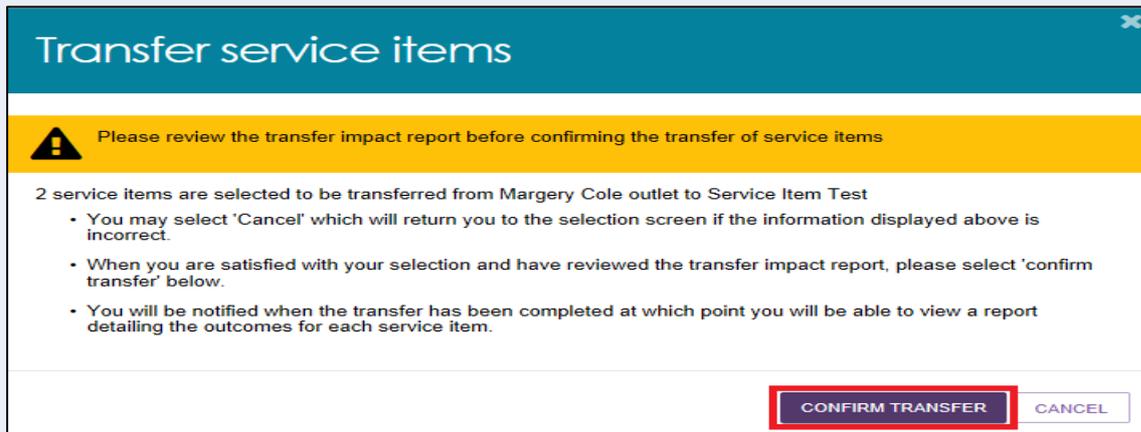


The transfer impact report is taking longer than expected. If you need to review report before transferring, you can navigate away and be informed when report completes. Alternatively, you can start transfer services at any time.

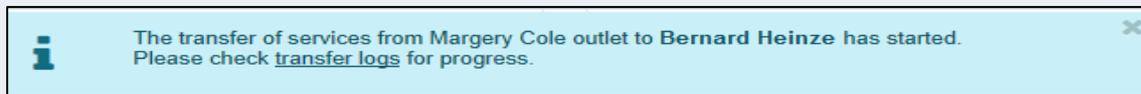
10. If you have reviewed the impact of the transfer and want to proceed, select 'Transfer Services'.

Programme	Service type	NAPS service ID	Funding region	Funding state	Service item name	Revised service item name
CHSP	Domestic Assistance	2548	Gippsland	VIC	Margery CHSP provider	Service item name: <input type="text"/>
CHSP	Home modifications	2548	Gippsland	VIC	Margery CHSP provider	Service item name: <input type="text"/>

11. To make any changes, click 'Cancel'. To finalise the transfer, click 'Confirm Transfer'.



The transfer may take some time to complete. Review the status of the transfer by reviewing the service transfer log.



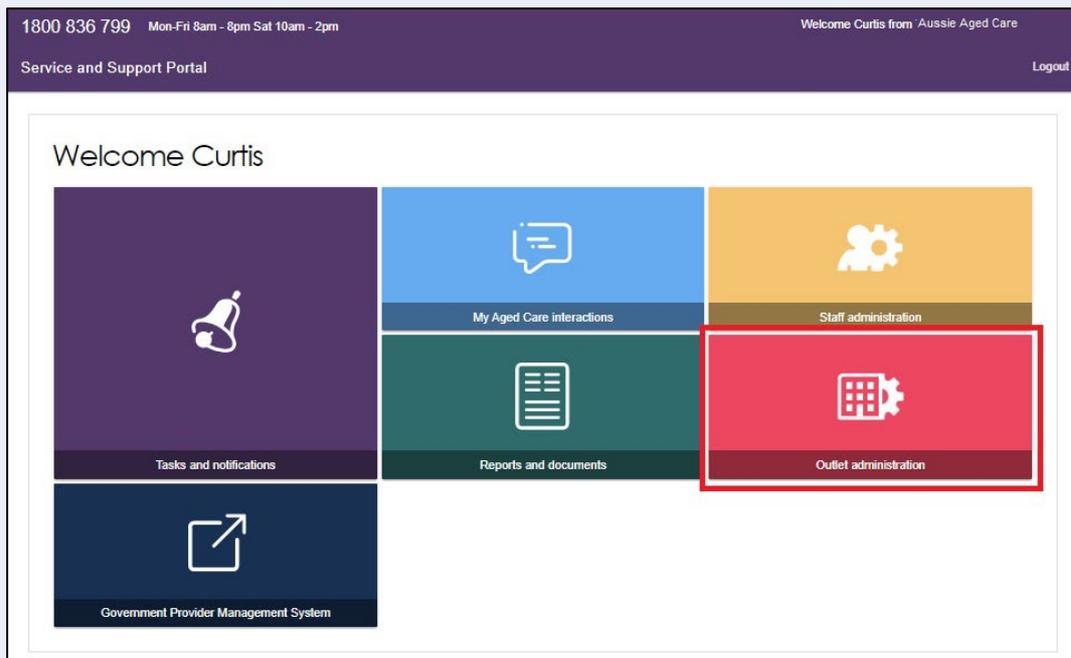
When the transfer action has started, the impacted records in the transfer process will be locked – the transfer process will run in the background.

Users will be able to view the records but cannot change the details until the transfer process has successfully completed.

## Viewing the service transfer log

To review the status or details of previous and current service transfers, review the Transfer Log.

1. Select 'Outlet administration' from the homepage.







- Select the service that the client(s) is currently linked to. You can use the search functionality to find specific service types. Click 'Next' to continue.

**Transfer clients**

Transfer from: Margery outlet

Search for a service type or select from those below

Programme: Commonwealth Home Support Program  Service type:  NAPS Service ID:

Service type	NAPS Service ID	Service item name	Funding State	Funding region
<input checked="" type="radio"/> Meals	2345	MargeryCHSP Provider	VIC	Gippsland
<input type="radio"/> Domestic Assistance	2548	MargeryCHSP provider	VIC	Gippsland
<input type="radio"/> Home maintenance	2548	MargeryCHSP provider	VIC	Gippsland
<input type="radio"/> Home modifications	2548	MargeryCHSP provider	VIC	Gippsland
<input type="radio"/> Other Food Services	2548	MargeryCHSP provider	VIC	Gippsland
<input type="radio"/> Allied Health and Therapy Services	2548	MargeryCHSP provider	VIC	Gippsland
<input type="radio"/> Meals	2548	MargeryCHSP provider	VIC	Gippsland

- You can choose to transfer clients to another service within the same outlet or transfer clients to another service under another outlet. Choose from one of these options and select 'Next'.

**Transfer clients**

Transfer from: Margery outlet

Source service type: Meals 234 Margery CHSP Provider

Transfer within same outlet  Transfer to another outlet

If you select 'Transfer to another outlet' (for Organisation Administrators only) you will not be able to proceed unless you select an outlet.

- Select the service that you want to transfer the clients to, from the list provided.

Click 'Next' to continue.

**Transfer clients**

Transfer from: Margery outlet

Source service type: Meals 234 Margery CHSP Provider

Transfer within same outlet  Transfer to another outlet

Search for a target service by outlet or select from those below

Outlet:

Outlet	NAPS Service ID	Service item name	State	Contact name	Phone Number
<input checked="" type="radio"/> Margery Cole outlet	2548	MargeryCHSP provider	VIC	Squire Seikaly	(02) 3928 4924

7. Select the client(s) that you wish to transfer to the new service. Click 'Transfer clients' to continue.

You can also search for client to transfer by their last name, first name, or their Aged Care User ID.

You can transfer up to a maximum of 50 clients at one time.

### Transfer clients

Transfer from: **Margery outlet**  
Source service type: **Allied Health and Therapy Services 2548 MargeryCHSP provider**

Transfer to: **Margery Co outlet**  
Destination service type: **Allied Health and Therapy Services 6548 Margery Care Service**

Clients added to transfer: 0 (Max 50)

Last name:  First name:  Aged Care User ID:

<input type="checkbox"/>	Last Name	First Name	Aged Care User ID	Referral Accepted Date	Service Commencement Date
<input type="checkbox"/>	Apple	Kelly	AC07731946	10 July 2017	
<input type="checkbox"/>	Asharp	Dustin	AC57788176	6 November 2017	
<input type="checkbox"/>	McClusky	Maddi	AC05791660	7 July 2017	
<input type="checkbox"/>	Scott	Bega	AC21661160	11 July 2017	
<input type="checkbox"/>	Warner	Shane	AC04271045	8 November 2017	8 November 2017

8. Review the information about the transfer.

- To make any changes, click 'Cancel'.
- If correct, select 'Confirm transfer' to complete the process.

## Transfer Client(s)

 Please review the following summary of changes before confirming the transfer of clients. You must also transfer the clients within DHS systems in order to continue receiving subsidies uninterrupted.

1 clients are selected to be transferred from 2548 Margery CHSP provider at Margery outlet to 2548 Margery CHSP provider at Service Item Test.

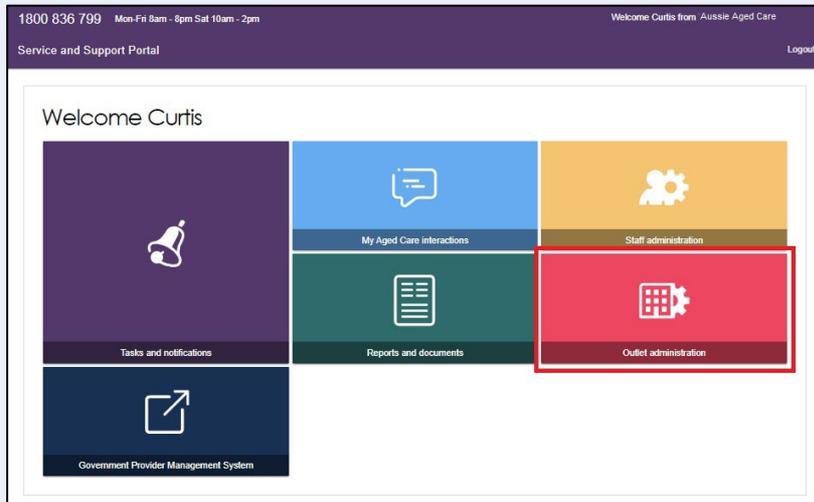
- You may select 'Cancel' which will return you to the selection screen if the information displayed above is incorrect.
- When you are satisfied with your selection and above summary, please select 'confirm transfer' below.
- You will be notified when the transfer has been completed at which point you will be able to access an Error Log detailing the outcomes for each client.



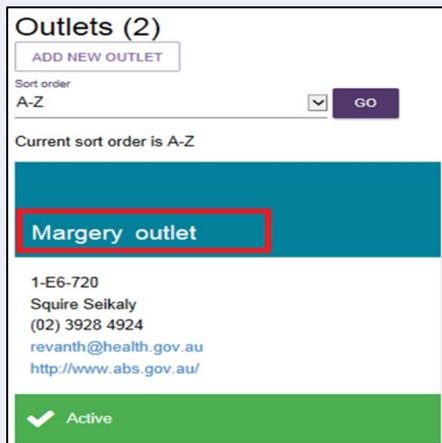
## Viewing the client transfer log

To review the status or details of previous and current client transfers, review the Transfer Log.

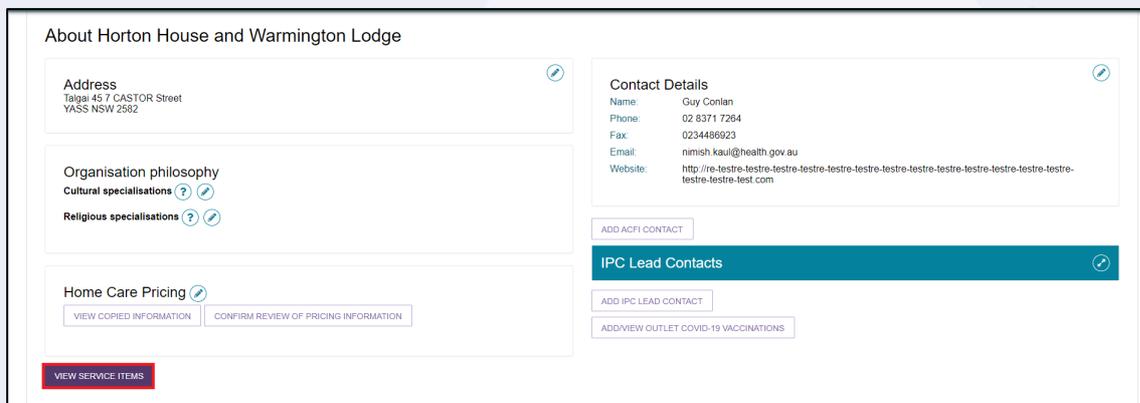
1. Select 'Outlet administration' from the homepage.



2. Select an outlet to access the transfer log.



3. From the "View outlet" page click the "View service items" button.



4. Select the 'View Transfer Logs' button at the top right of the screen.



The transfer log will display information about past and current service and client transfers, including:

- Transfer type (service or person)
- Transfer date
- Status (In progress, completed, completed with errors)

For more detailed information about the transfer, click the magnifying glass icon.



Type	Transfer date	Status
Service Item	15 November 2017 8:53 AM	In progress
Person	6 November 2017 12:28 PM	Completed

If a transfer has not been completed successfully, you can retry by clicking the magnifying glass icon, selecting the items you want to retry and clicking the 'Retry Selected' button.



Select	Last Name	First Name	Aged Care User ID	Status	Message
	Asharp	Dustin	AC57788176	3 - Success	C400: Aged Care User AC57788176 has been successfully transferred from Margery outlet NAPS ID 2548 Margery CHSP provider to Service Item Test NAPS ID 2548 MargeryCHSP provider

## For more information or support

Further information is available in the My Aged Care - Service and Support Portal Resources available on the department's [website](#).

The My Aged Care Service Provider and Assessor helpline is available on 1800 836 799.