

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 <u>Application to Vary Conditions of Allocation</u> 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 <u>Transferring home care packages services</u> 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.

1. Select 'Outlet administration' from the homepage.

1800 836 799 Mon-Fri 8am - 8pm Sat 10am - 2pm Velcome Curtis from Aussle Aged Care						
Service and Support Portal		Lo	gout			
Welcome Curtis						
	Ę.	80				
	My Aged Care interactions	Staff administration				
		*				
Tasks and notifications	Reports and documents	Outlet administration				
Government Provider Management System						

2. Select the outlet that contains the service items you wish to transfer to a different outlet.

ADD NEW OUTLET			
-Z GO			
urrent sort order is A-Z	-		
Multi Service Home Assistance	Outlet for the better	Yass Packages	
Multi Service Home Assistance	Outlet for the better	Yass Packages	
Multi Service Home Assistance 1-9W07RE0 Graham Prom	Outlet for the better 1-9PRJJTU James Graham	Yass Packages	
Multi Service Home Assistance 1-9W07REO Graham Prom (02) 6200 0000	Outlet for the better 1-9PRJJTU James Graham (02) 6277 8445 James collevillage com au	Yass Packages 1-9HH1Q4M Acacia Provider (02) 9000 0000	
Multi Service Home Assistance 1-9W07REO Graham Prom (02) 6200 0000	Outlet for the better 1-9PRJJTU James Graham (02) 6277 8445 james g@bulldogs.com.au http://www.bulldogs.com.au	Yass Packages 1-9HH1Q4M Acacia Provider (02) 9000 0000	

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



4. In the "View service items" page click on the 'Transfer Service Item' button.

ADD A SERVICE ITEM	TRANSFER SERVICE ITEM	TRANSFER CLIENTS

5. 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 item	IS		
Transfer from: Margery outlet				
Search for an outlet or select from those belo	w			
Outlet name:	SEARCH			
Outlet	Status	State	Contact name	Phone number
O Margery outlet	Active	VIC	Squire Seikaly	(02) 3928 4924
Bernard Heinze outlet	Active	ACT	George Kelly	(02) 9876 5432
NEXT				

6. 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.

Iransfer service inventory if Transfer from: Margery outlet to Bernard Heinze outlet	ems		\odot	
Services added to transfer: 0 (max 25)				
earch for services or select from those below regremme commonwealth Home Support Programme		SEARCH SELECT ALL BELOW		
Service type	NAPS ID	Service item name	Funding state	Funding region
C Meals	2345	Margery CHSP Provider	VIC	Gippsland
Domestic Assistance	2548	Margery CHSP provider	VIC	Gippsland
Home maintenance	2548	Margery CHSP provider	VIC	Gippsland
Transport	2548	Margery CHSP provider	VIC	Gippsland
				freezen inden stat
Cther Food Services	2548	Margery CHSP provider	VIC	Gippsland
Conter Food Services Allied Health and Therapy Services	2548	Margery CHSP provider Margery CHSP provider	VIC	Gippsland

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

ransfer from:	Margery Cole outlet to Serv	rice Item Test			\odot	
Services adde	d to transfer: 2 (max 25)				\odot	
Programme	Service type	NAPS service ID	Funding region	Funding state	Service item name	Revised service item name
HSP	Domestic Assistance	2548	Gippsland	VIC	Margery CHSP provider	Service item name:
HSP	Home modifications	2548	Gippsland	VIC	Margery CHSP provider	Service item name:

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.

Trans	nsfer service i						
Transfer from:	Margery Cole outlet to Servir	ce Item Test			۲		
Services addee	3 to transfer: 2 (max 25)				\odot		
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:	۲
CHSP	Home modifications	2548	Gippsland	VIC	Margery CHSP provider	Service item name:	٢
SAVE TRANSFE	R AND GENERATE IMPACT REF	ORT TRANSFER SEE	RVICES CANCEL				

The following banner will display:

Please wait for the transfer impact report to complete before transferring services. Depending on the number of services being transferred, this may take some time. You may navigate away from this page and continue to transfer services once the impact report has finished.

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'.

🝺 Tran	sfer service ir	ventory it	rems				
Transfer from:	Margery outlet to Bernard Hei	nze outlet			۲		
Services added	to transfer: 2 (max 25)				\odot		
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:	۲
CHSP	Home modifications	2548	Gippsland	VIC	Margery CHSP provider	Service item name:	۲
SAVE TRANSFE	R AND GENERATE IMPACT REPOR	TRANSFER SERV	ICES CANCEL				

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

Transfer service items	×
• • • • • • • • • • • • • • • • • • •	
A Please review the transfer impact report before confirming the transfer of service items	
2 service items are selected to be transferred from Margery Cole outlet to 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 have reviewed the transfer impact report, please select 'confirm transfer' below. 	
 You will be notified when the transfer has been completed at which point you will be able to view a report detailing the outcomes for each service item. 	
	_
CONFIRM TRANSFER CANCEL	

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.



2. Select an outlet to access the transfer log.

Outlets (86)	
Barcaldine Multipurpose Health Service C	
Soft order A-Z	
Current sort order is A-Z	
Alpha and Jericho Multipurpose Health Service	Ashworth House Nursing Home
1-E6-2057	1-E6-1449
Fredrick Kearny 02 2752 1523	Wesley Ludium 02 7037 5362
Edward Jillson@test.dme.we	Leon Bouy@test.cgc.zc
✓ Active	✓ Active

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

Address	Contact Details
Talgai 4.5 7 CASTOR Street	Name: Guy Conlan
YASS NSW 2502	Phone: 02 8271 7284
Organisation philosophy	Fax: 023449623
Cultural specialisations ? ?	Email: nmish kau@nealth.gov au
Religious specialisations ? ?	Website: http://re-tarte-testre
	IPC Lead Contacts (add IPC Lead Contact) ADD IPC Lead CONTACT (add IPC Lead CONTACT) ADDIMEW OUTLET COVID-19 VACCINATIONS (add IPC Lead CONTACT)

4. Select the 'View Transfer Logs' button.

ADD A SERVICE ITEM	TRANSFER SERVICE ITEM	TRANSFER CLIENTS	VIEW TRANSFER LOGS

- Transfer type (service or person)
- Transfer date

(j)

• Status (In progress, completed, completed with errors)

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

Transfer Logs				
	Туре	Transfer date	Status	
From Margery outlet to Bernard Heinze outlet	Service Item	15 November 2017 8:53 AM	In progress	
From Margery outlet to Bernard Heinze outlet - Allied Health and Therapy Services	Person	6 November 2017 12:28 PM	Completed	۹

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.

Transfer Logs										
rom Margery Cole outlet to Bernard Heinze outlet - 14 November 2017 2:41 PM										
Select	Programme	Service item	0	NAPS service ID	٠	Service iter	n name	٠	Status 🗢	Message
	CHSP	Allied Health and Therapy Services		2548		Margery provider	CHSP		1 - Error	SI102: A Service Item with the same name exists in the Destination Outlet.
	CHSP	Domestic Assistance		2548		Margery provider	CHSP		1 - Error	SI102: A Service Item with the same name exists in the Destination Outlet.
	CHSP	Home maintenance		2548		Margery provider	CHSP		1 - Error	SI102: A Service Item with the same name exists in the Destination Outlet.

! If you continue to experience issues with transferring services, please call My Aged Care on **1800 836 799** for assistance.

Transferring a client between services

Organisation administrators may choose one or multiple clients to transfer between services (of the same service type) within an outlet or to another outlet within their organisation.

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

To transfer a client(s) to another service, follow the steps below.

1. From 'Outlet administration' select the outlet that contains the clients you wish to transfer to another service (the outlet you want to transfer clients 'from').

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

Address Talga 45 7 CASTOR Street YASS NSW 2502 Organisation philosophy Cultural specialisations (?) (?)	Contact Details Name: Guy Conlun Phone: 02 8371 7284 Fax: 02344090633 Emait: nnihis kau/@health.gov.au Website: http://ret.etric-testre-t
Religious specialisations 🕐 🖉	ADD ACFLOONTACT
	ADD IPC LEAD CONTACT ADD VILET COVID-19 VACHATIONS

 Click on the 'Transfer Clients' button to start the process of transferring client(s) to another service.

ADD A SERVICE ITEM	TRANSFER SERVICE ITEM	TRANSFER CLIENTS	
			•

4. 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 from: Margery outlet				
earch for a service type or select from those below				
commonwealth Home Support Program	/pe	NAPS Service ID:	SEARCH	
Service type	NAPS Service ID	Service item name	Funding State	Funding region
O <mark>Meals</mark>	2345	MargeryCHSP Provider	VIC	Gippsland
O Domestic Assistance	2548	MargeryCHSP provider	VIC	Gippsland
Home maintenance	2548	MargeryCHSP provider	VIC	Gippsland
Home modifications	2548	MargeryCHSP provider	VIC	Gippsland
O Dther Food Services	2548	MargeryCHSP provider	VIC	Gippsland
Allied Health and Therapy Services	2548	MargeryCHSP provider	VIC	Gippsland
Meals	2548	MargeryCHSP provider	VIC	Gippsland

5. 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	\odot
O Transfer within same outlet O Transfer to another outlet	
NEXT CANCEL	

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

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

Click 'Next' to continue.

Transfer from: Margery outlet Source service type: Meals 234	Margery CHSP Provider		\odot	
Fransfer within same outlet dark for a target service by outlet	Transfer to another outlet et or select from those below	SEARCH		
utlet	NAPS Service ID	Service item name	State 🛛 🖨 Contact name	Phone Number

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.

∰ T	ransfer cli	ents							
Transfe Source	Transfer from: Margery outlet Source service type: Allied Health and Therapy Services 2548 MargeryCHSP provider								
Transfe Destina	Transfer to: Margery Co. outlet Destination services http://www.automatical.com/automatical.co								
Clients	Clients added to transfer: 0 (Max 50)								
Last name	8.	F	First name:	Aged Care User ID:		SEARCH	SELECT ALL	CLEAR SEARCH	
	Last Name	First Name	Aged Care User ID	Referral Accepted Date	Service	Commenceme	ent Date		e
	Apple	Kelly	AC07731946	10 July 2017					
	Asharp	Dustin	AC57788176	6 November 2017					
	McClusky	Maddi	AC05791660	7 July 2017					
	Scott	Bega	AC21661160	11 July 2017					
	Warner	Shane	AC04271045	8 November 2017	8 Nover	mber 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 clients within DHS systems in order to continue receiving subsid	the transfer of clients. You must also transfer lies uninterrupted.
1 clients are selected to be transferred from 2548 . Margery CHSP provide Margery CHSP provider at Service Item Test.	er at Margery outlet to 2548
 You may select 'Cancel' which will return you to the selection screen incorrect. 	if the information displayed above is
 When you are satisfied with your selection and above summary, plea 	se select 'confirm transfer' below.
 You will be notified when the transfer has been completed at which p detailing the outcomes for each client. 	oint you will be able to access an Error Log
	CONFIRM TRANSFER CANCEL

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.



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

ADD A SERVICE ITEM	TRANSFER SERVICE ITEM	TRANSFER CLIENTS	VIEW TRANSFER LOGS

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.

Transfer Logs										
	Туре	Transfer date	Status							
From Margery outlet to Bernard Heinze outlet	Service Item	15 November 2017 8:53 AM	In progress							
From Margery outlet to Bernard Heinze outlet - Allied Health and Therapy Services	Person	6 November 2017 12:28 PM	Completed	۹						

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.

Transfer Logs									
From Margery Cole outlet to Service Item Test - Allied Health and Therapy Services - 6 November 2017 12:28 PM									
Select	Last Name 🔹	First Name 📢	Aged Care User ID	e 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				
CANCE	EL								

For more information or support

Further information is available in the My Aged Care - Service and Support Portal Resources available on the department's <u>website</u>.

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