

## Assessor Portal User Guide 11 - Assessment Delegate Support Role

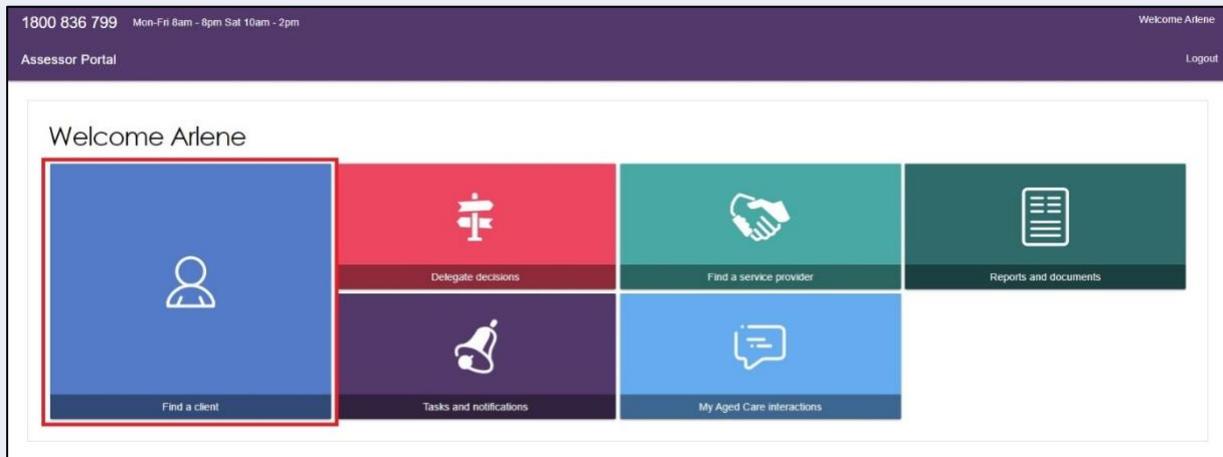
The Delegate Support role in the My Aged Care assessor portal (assessor portal) enables anyone assigned the role to perform administrative functions to support the Assessment Delegate. For example, the Assessment Delegate Support will be able to print support plans, as well as generate, print and upload referral code letters and approval letters. The Assessment Delegate Support operates under the instructions of the Assessment Delegate.

This guide contains the following topics:

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## Accessing client information

1. To locate information about a client and print a copy of the client record, select the **Find a client** tile from your homepage.

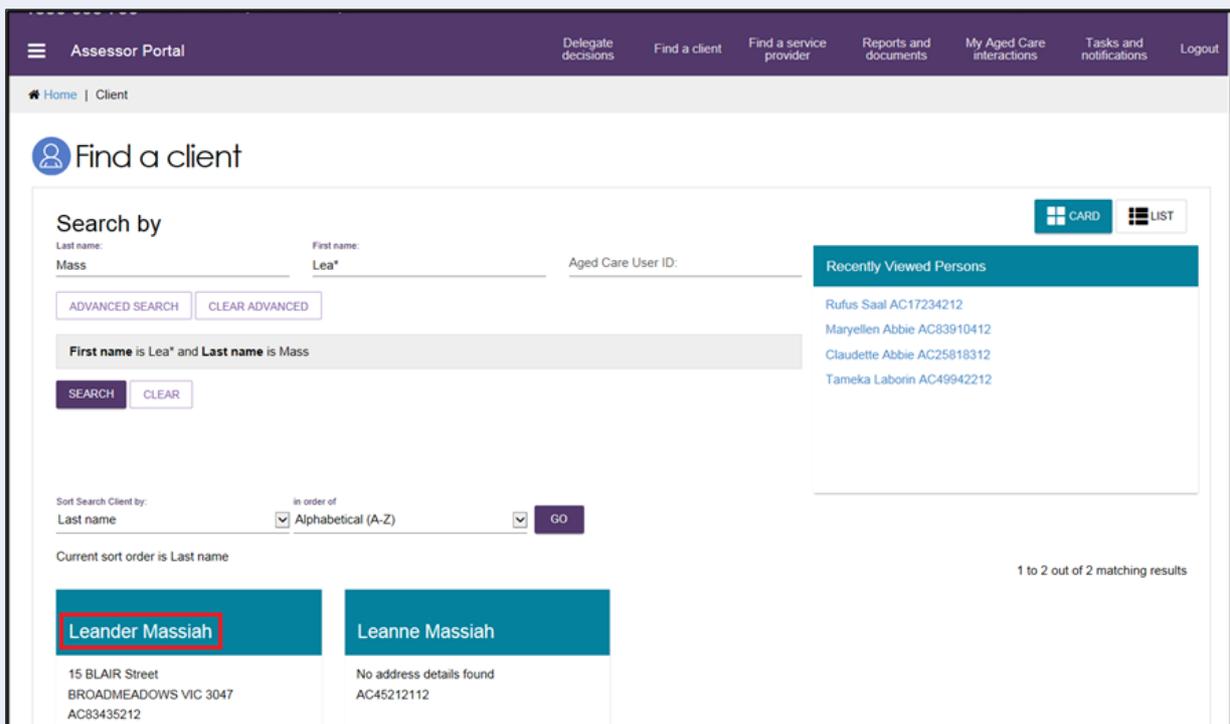


2. Use the **Find a client** function to search for the client. Client records you have recently viewed will appear in the **Recently Viewed Persons** section, and depending on your browser, this will either appear on the right side or the bottom section of the page.

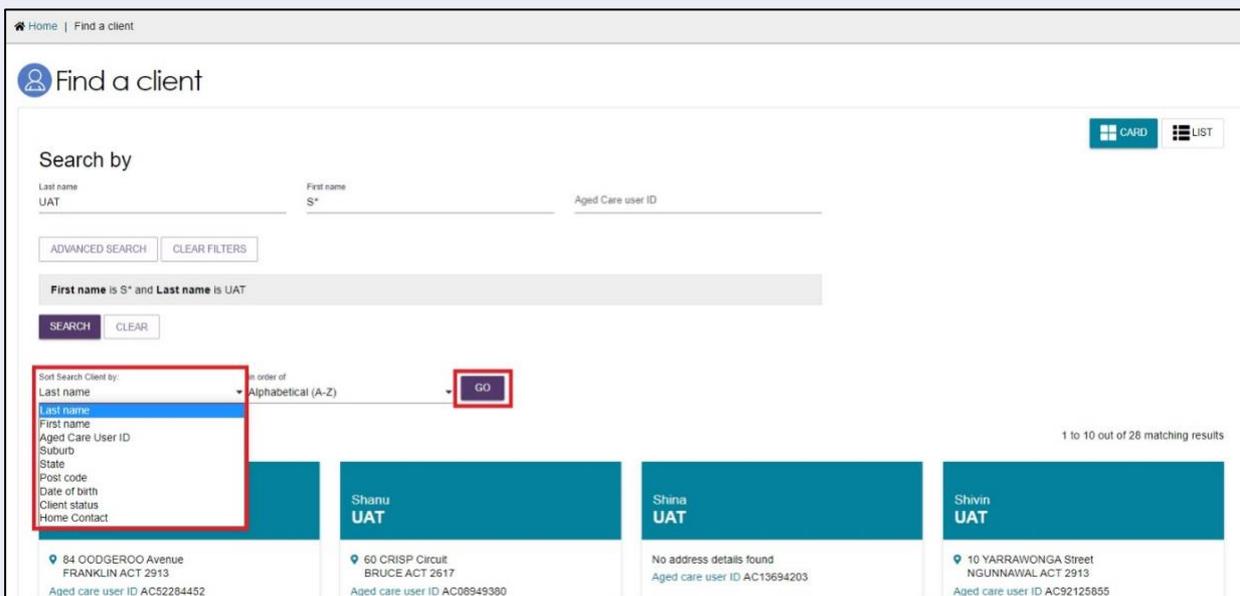
The **ADVANCED SEARCH** functionality allows you to search by additional fields. Refer to the [My Aged Care – Assessor Portal User Guide 1 – Registering and referring clients](#) for more information on using this functionality.



Any matching search results will be displayed. Select the client's name.



- You will be able to sort the matching results by a number of criteria including last name, first name, Aged Care User ID, suburb, state, post code, date of birth and more. Select the criteria, the order of display as required and select **GO**.



- Selecting the client's name tile will take you to the Client Summary. You can view and print a RTF (Rich Text File) of the client record by selecting the **VIEW CLIENT REPORT** button.



1800 836 799 Mon-Fri 8am - 8pm Sat 10am - 2pm Welcome Ariene

Assessor Portal Delegate decisions Find a client Find a service provider Reports and documents Tasks and notifications My Aged Care interactions Logout

Home | Find a client | Shina UAT

**Shina UAT**  
Female, 72 years old, 1 July 1950, AC13694203 Primary contact: Shina UAT (self)  
No support relationships recorded

**Client summary** VIEW CLIENT REPORT

Client summary Client details Support Network Approvals Plans Attachments Services My Aged Care interactions Notes Tasks and Notifications

**Client tracker**

**Client summary**

**Assessments**

<b>Home Support Assessment</b> Finalised on 22 February 2021 ACT Springs RAS UAT 02 6258 5855	<b>Home Support Assessment</b> Finalised on 22 February 2021 ACT Springs RAS UAT 02 6258 5855
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**Recommendations and approvals** **Service delivery status**

Help at home - Entry level support (Commonwealth Home Support Programme) Allied Health and Therapy Services Started on 22 February 2021 - Horton House and Warrington Lodge 02 8371 7265

5. A **Generating Report** pop up appears, then the Rich Text File (RTF) appears on your browser ready to be downloaded or opened.

Generating report. You will be redirected to the Reports page if the request takes longer than expected...



6. Opening the RTF shows a Copy of the Client Record.

Australian Government Department of Health myagedcare

**Aaron Smith**  
Aged Care ID: AC69149045  
Date of Birth: 14/12/1939

**Client Details**

Age 84 Gender Male  
Medicare number 11761303481 DVA Card number not applicable  
Address 114 3 ASHWOOD Road, WILTON, NSW, 2571, Australia

Lives With	With partner	Accommodation type	PR Relation Owns/Purchasing
Phone - Home	+610227716884	Phone - Mobile	+610251016563
Email	not applicable	Fax	not applicable
Preferred phone	Home	Preferred correspondence method	Post
Country of Birth	Australia	Ethnicity	Australian
Preferred Language	English	Requires Help to Communicate	No
TIS Required	not applicable	NRS Required	N
Marital status	Married (registered/de facto)	Aboriginal and/or Torres Strait Islander Status	No - Neither
Veteran or War Widow/Widower	not applicable	DVA Entitlement	No DVA entitlement
Private health insurance	not applicable	Receiving payments	not applicable



## Printing the support plan and generating referral code letters

1. To view and print the support plan, navigate to the **Plans** tab in the client record. From here, select **SUPPORT PLAN**.

The screenshot shows the 'Assessor Portal' interface for a client named Leander Massiah. The 'Plans' tab is selected and highlighted with a red box. Below the tab, there are several sections: 'Current Episode' (Episode ID: 1-LVX-4638, 25 February 2017 - Present) with a 'SUPPORT PLAN' button highlighted in red; 'Recommendations' (Home Care Package Level 2); 'Upcoming Review(s)' (No upcoming reviews scheduled); 'Assessment history' (Comprehensive Assessment 25 February 2017); 'Plan history' (No plan history available); 'Review history' (No review history available); and 'Reablement and linking support history'. A 'VIEW PDF OF CLIENT RECORD' button is visible in the top right corner.

2. The **Goals & recommendations** tab will be displayed. You can print a copy of the support plan by selecting **PRINT COPY OF SUPPORT PLAN**.

The screenshot shows the 'Support plan and services' interface for the same client. The 'Goals & recommendations' tab is selected and highlighted with a red box. Below the tab, there are several sections: 'IAT outcome' (IAT outcome: HCP, Current assessment type: Comprehensive Assessment); 'Client concerns and goals' (Concern: And I looked at it, and 9C6341827); and 'Goal: To have access to a home care package'. A 'PRINT COPY OF SUPPORT PLAN' button is highlighted in red in the top right corner.

3. Navigate to the **Manage services & referrals** tab. From here, you can view the client's service referrals and generate a copy of the referral code letter.



Support plan and services COMPREHENSIVE ASSESSMENT 23 SEPTEMBER 2024 [PRINT COPY OF SUPPORT PLAN](#)

Identified needs | Goals & recommendations | Decisions | **Manage services & referrals** | Associated People | Review

**Inbound referral details**

**Services not yet in place**

**Help at home**

Select all Help at home

**Personal Care**

- Assistance with Self-Care

**High** ● Rejected Referrals/

No associated goals

Recommended By: Nina Reddy

User Type: Assessor

[REFERRAL HISTORY](#)

Manual referral code 1-43022805592

[FIND PROVIDERS](#)

## Printing approval/non-approval letters

1. To generate and print approval or non-approval letters, navigate to the **Decisions** tab in the client record. At the bottom of the page, you will be able to generate the Approval or Non-Approval letter.

Assessor Portal Delegate decisions | Find a client | Find a service provider | Reports and documents | My Aged Care interactions | Tasks and notifications | Logout

Home | Leander Massiah | Support plan and services [PRINT COPY OF SUPPORT PLAN](#)

Leander Massiah support plan and services

Identified needs | Client Motivations | Goals & recommendations | **Decisions** | Manage services & referrals | Associated People

**Current care approvals**

**Residential Permanent**

Priority for this care type: Medium

Approval starts: 12 August 2016

Delegate comment: Approval if required in future

Source system: Gateway

**Residential Respite High Care**

Priority for this care type: Medium

Approval starts: 12 August 2016

Delegate comment: Highly recommend use of respite

Source system: Gateway

**Delegate decisions and comments**

Assessed on 12 August 2016

**Decisions**

**Residential Permanent**

Priority for this care type: Medium

Approval starts: 12 August 2016

Delegate comment: Approval if required in future

Source system: Gateway

**Residential Respite High Care**

Priority for this care type: Medium

Approval starts: 12 August 2016

Delegate comment: Highly recommend use of respite

Source system: Gateway

[ADD RESIDENTIAL RESPITE CARE EXTENSION](#)

**Decision date**  
12 August 2016 12:00 AM (Australian Eastern Standard Time)

[GENERATE APPROVAL LETTER](#) | [UPLOAD APPROVAL LETTER](#)

[RETURN TO CLIENT](#)

2. When you select **GENERATE APPROVAL LETTER**, you will be asked to enter information in a pop-up modal regarding the assessment and the evidence supporting the approved care types. This information will display in the approval letter.

### Generate approval letter

#### Evidence

Name of the qualified medical professional your medical information provided by (insert name of qualified medical personnel)

Assessment information indicates you need help to perform daily living tasks

Assessment information indicates that you require assistance to make decisions about your living activities and arrangements

Assessment information which indicates that you would benefit from increased social and community participation

Other evidence as reason for care approval

**GENERATE APPROVAL LETTER** **CANCEL**

! Like any reviewable decision, ensure that the decision letter includes:

- The decision
- The reason for the decision
- The supporting evidence
- The right of review.

This is to ensure the high quality and consistency in letters that clients receive.

3. You will be redirected to the **Reports** tab of the **Reports and documents** page where you will be able to select **View** to open a copy of the letter.

### Reports and documents

Reports Forms Links

#### My Reports

Name	Requested Date	Status
Aaron Smith Delegate Approval Letter Template 24 September 2024	24 September 2024	Ready <b>View</b>

! Certain user generated documents, including Approval/Non-Approval letters and Referral Code letters will only be retained in **Recently Requested Reports** for seven days, after which they will be cleared from this screen. They can be regenerated as per the original process.



4. Once the Assessment Delegate has signed the letter, you can use the **Upload approval letter** button in the **Decisions** tab of the support plan to upload the letter to the client's record. Alternatively, you can upload this through the **Attachments** tab on the client record.

Upload approval letter

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

Approval letter to upload \*

Choose File No file chosen

UPLOAD CANCEL