



Service and Support Portal User Guide - Recording and updating client service delivery information

This User Guide is designed for Staff Members and Team Leaders within the My Aged Care Service and Support Portal. It explains the procedures for recording and updating service delivery information in the client record. A Team Leader can manage referrals, as well as all the functions of a Staff Member.

Service delivery information should be recorded on the My Aged Care client record for all clients accepted for service. This includes service commencement date, service frequency, and service end date where a service has ceased. This information should be recorded within 14 calendar days of acceptance, and providers will receive notification reminders prompting them to enter this information if it is not completed within this timeframe.

For Home Care Packages and Residential Care Permanent services, the service commencement date will be automatically filled in from the Services Australia records and will be read-only. Other information such as service frequency will still need to be maintained by the provider.

For further detail regarding the procedures for updating service delivery information, please refer to the [My Aged Care for service providers](#) section on the Department’s website.

This guide is split into sections as follows:

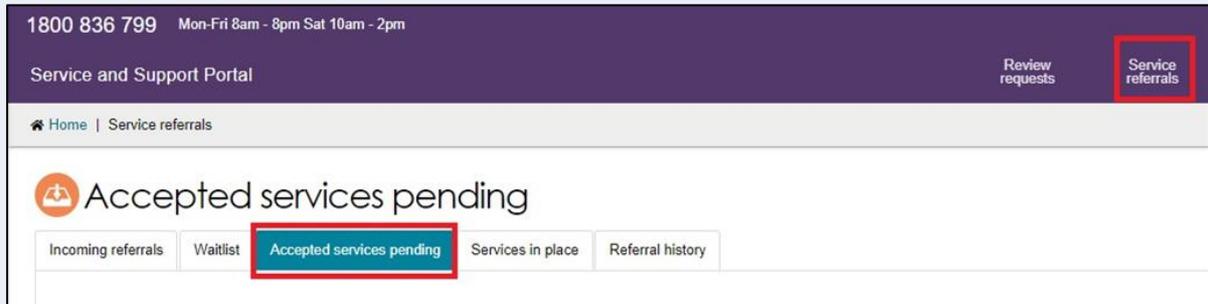
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Adding service delivery information

1. Go to the Service Referrals tile from the Service and Support Portal home page, then select the **Accepted Services Pending** tab.

Alternatively, if you know the client's name you can use the **Find a client** function.

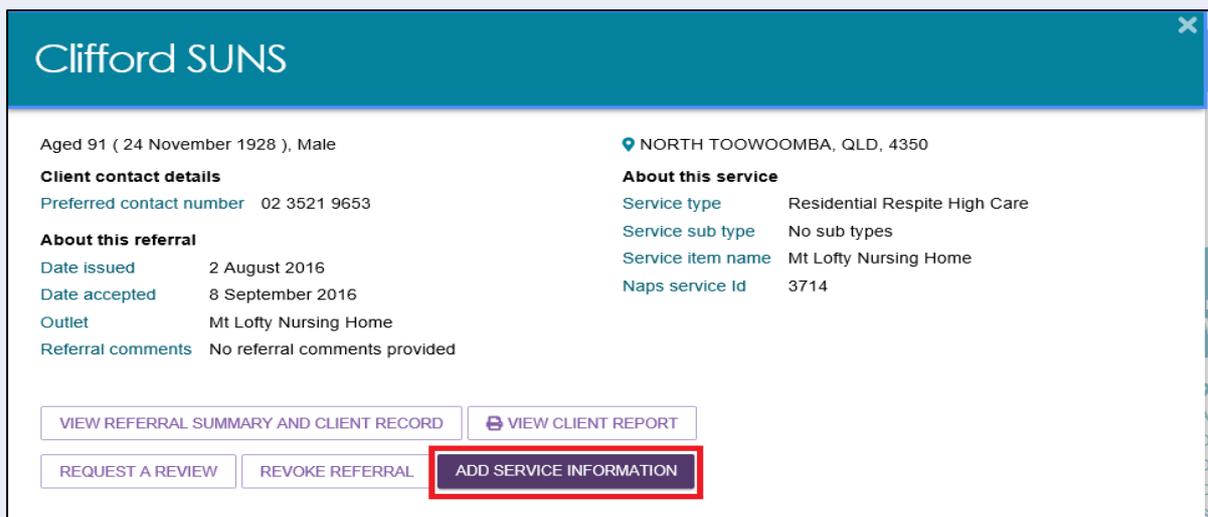
This tab displays accepted referrals that do not have service delivery information recorded against them.



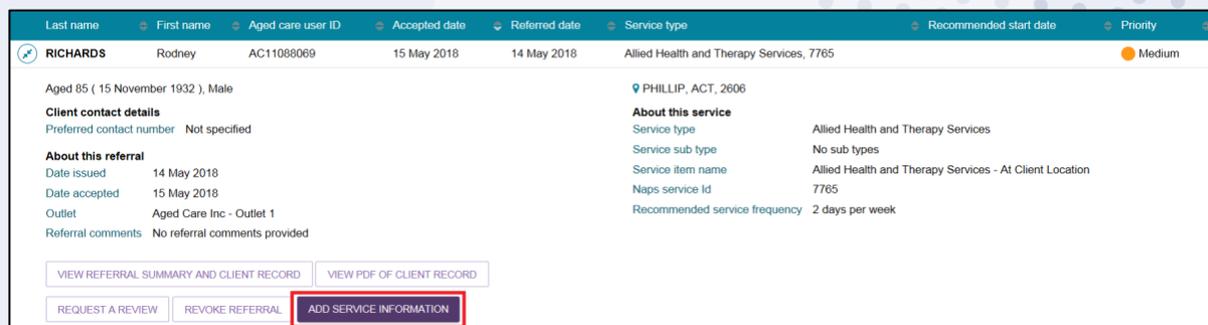
2. Select the relevant client's service referral, then you can add service delivery information for the service.

To do this, select the expand icon (double arrow) on the Client card or in List View to view the client information. Select **Add service information**.

Card View



List View



3. The **Add service information** screen will be displayed.

When adding service information for residential care including respite, transition care, short term restorative care, and Commonwealth home support programme services, you must enter the **Service start date**, input a **Frequency**, and select an **Intensity** from the drop-down list.

Enter any additional information in the remaining fields and select **Save changes**.

The screenshot shows a form titled "Add service information" for Rodney Richards. The form includes a header with a close button (X) and a note: "All fields marked with an asterisk (*) are required. You are about to add service information for **Rodney Richards**. Service type **Allied Health and Therapy Services**". A red box highlights the "Service start date" field (14/06/2018) and the "How frequently is this service provided?" section, which contains "Frequency (e.g. 2)" and "Intensity (e.g. days per month)". Below this, there is a "Planned review date" field and a "Service sub-type" section with checkboxes for "Dietitian or Nutritionist", "Podiatry", and "Physiotherapy". At the bottom right, there are "SAVE CHANGES" and "CANCEL" buttons.

When updating Home Care Package information you must enter a **Frequency** and select an **Intensity** from the drop-down list.

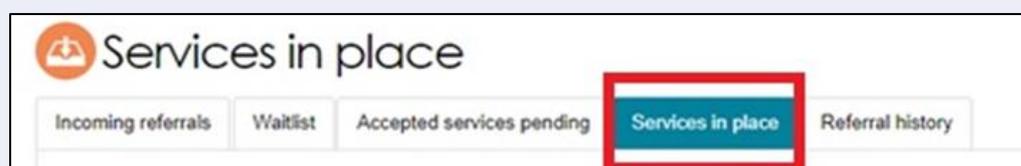
The **Service start date** will update once the commencement date has been received from Service Australia.

Enter any additional information in the remaining fields and select **SAVE CHANGES**.

The screenshot shows a form titled "Add service information" for Vernon DENAFO. The form includes a header with a close button (X) and a note: "All fields marked with an asterisk (*) are required. The Service referral will be moved to 'Service in place' tab after service start date is received from DHS. You are about to add service information for **Vernon DENAFO**". A red box highlights the "Home Care Package" section, which includes "Home Care Package Level approved - Home Care Package Level 2", "Home Care Package Level 2 approval starts - 19 June 2017", "Home Care Package Level assigned - Home Care Package Level 1", and "Home Care Package assigned date - 19 June 2017". Below this, there is a "Service start date" field with a question mark icon and the "How frequently is this service provided?" section, which contains "Frequency (e.g. 2)" and "Intensity (e.g. days per month)". Below this, there is a "Planned review date" field and an "Add a reason for changes or other comments" section with a character limit of 255. At the bottom right, there are "SAVE CHANGES" and "CANCEL" buttons.

- To supply specific service delivery information select **Other – Specify** and enter additional service delivery information in the free text field.

- Once saved, the client information will move to the **Services in place** tab:
 - Immediately for residential care including respite, transition care, short term restorative care, and Commonwealth home support programme services.
 - once a **Service start date** is present, for Home Care Packages.



- Once this has occurred, the filled-in service information will display under the **Services** section within the client record.

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

Service and Support Portal Logout

Home | Service referrals | Janees CITIZENN

Mr Janees CITIZENN
 Male, 80 years old, 1 July 1942, AC60163045
 1 BETTONG AVENUE ACCESS THROSBY, ACT, 2914
 Prefers to speak Chinese
 Primary contact: Janees Citizenn (self) - 0423 099 823
 No support relationships recorded

Janees Citizenn services

REQUEST A REVIEW VIEW CLIENT REPORT

Client summary Client details Support Network Referrals for my organisation Plans Attachments Approvals **Services**

My Aged Care interactions Notes Tasks and Notifications Residential Care

Current services in place

Residential Permanent
 Service provided by RFA Auto Facility

About this referral	From the assessor	From the service provider
Referral details	Approval details	About the service
Accepted	Approval start date 29 August 2022	Service dates
		Start date 30 August 2022

UPDATE SERVICE INFORMATION

! Service information for a Home Care Package will contain further information about the package, such as if the approval is for a higher level than the assigned package. This then mean that the client has accepted an interim package and may remain on the national Home Care queue to receive a package at their approved level.

Updating service delivery information

The **Services in place** tab in the **Service referrals** section of the Service and Support portal displays accepted services that have service delivery information recorded.

1. Navigate to the **Services in place** tab by selecting **Service referrals** from the home page or the **Service Referrals** link at the top of the screen from any page within the portal.

The screenshot shows the top navigation bar of the Service and Support Portal. The 'Service referrals' tab is highlighted with a red box. Below the navigation bar, the 'Incoming referrals' section is visible, with the 'Services in place' tab also highlighted with a red box.

2. For the service you are updating, expand the **Client list** to view the expanded client list view and select **Update Service Information**. Alternatively, you can select **Update Service Information** in the expanded card view.

Card View

The screenshot shows the 'Card View' for Otto JILLSON. The card displays client details, referral information, and service details. The 'UPDATE SERVICE INFORMATION' button is highlighted with a red box.

Client contact details
Preferred contact number 02 2394 3289

About this referral
Date issued 25 June 2019
Date accepted 25 June 2019
Outlet Darling Downs Hospital and Health Service Community Care- Taroom Home Care Packages
Referral comments No referral comments provided

Recommended service dates

About this service
Service type Home Care Package
Level approved Home Care Package Level 3
Approval starts 25 June 2019
Level assigned Home Care Package Level 2
Date assigned 27 February 2017
Service item name Taroom Health Service
Naps service id 18417
Service frequency 2 hours per week

Service dates
Start date 1 June 2016
Planned end date None
Planned review date 23 April 2020

[VIEW REFERRAL SUMMARY AND CLIENT RECORD](#) [VIEW CLIENT REPORT](#)
[REQUEST A REVIEW](#) [UPDATE SERVICE INFORMATION](#)

List View

The screenshot shows the 'List View' of service referrals. The table lists two referrals: Otto JILLSON and Lester CONLAN. The 'UPDATE SERVICE INFORMATION' button for the second referral is highlighted with a red box.

Last name	First name	Aged care user ID	Commencement date	Referred date	Service type	Recommended start date	Priority
JILLSON	Otto	AC73425332	01 Jun 2016	25 Jun 2019	Home Care Package, 18417		
CONLAN	Lester	AC23632490	08 Feb 2017	18 Apr 2017	Home Care Package, 18426		

Client contact details
Preferred contact number 02 3628 6800

About this referral
Date issued 18 April 2017
Date accepted 18 April 2017
Outlet Darling Downs Hospital and Health Service Community Care - Wandoan Home Care Packages
Referral comments No referral comments provided

About this service
Service type Home Care Package
Level approved Home Care Package Level 4
Approval starts 21 June 2013
Level assigned Home Care Package Level 4
Date assigned 31 March 2017
Service item name Wandoan Primary Health Centre
Naps service id 18426

Service dates
Start date 8 February 2017
Planned end date None
Planned review date None
Service provider comments No provider comments provided

[VIEW REFERRAL SUMMARY AND CLIENT RECORD](#) [VIEW CLIENT REPORT](#)
[REQUEST A REVIEW](#) [UPDATE SERVICE INFORMATION](#)

- Update service information and select **Save changes**. This information will now be updated on the **Services in place** tab and the **Services** tab in the client record.

Service delivery information can also be updated from the **Services** tab in the client record by selecting **Update service information** for the relevant service.

! Ceasing a client's service 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 Services will be revoked.

My Aged Care will not send correspondence to the client or their support network after the status is changed to **Deceased**.

Additional notes and attachments can be attached to the client record for 14 days after ceasing services.

Recording note of changes made to client service information

My Aged Care contact centre staff, assessors and service providers (providers) can view and add different types of notes about clients in the My Aged Care portals.

If there is significant change to a client's service delivery information, it is recommended that providers [update the service information](#) and add a note to the client record.

! If a client's needs or circumstances have changed significantly since their last assessment, a [review of the client's support plan](#) may be required.

Providers can add the following notes to the client record:

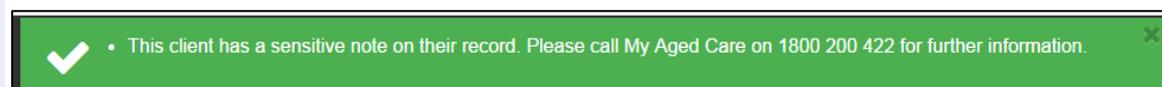
- **Observations:** Observations from provider and/or assessors' interactions with the client. Assessors and providers can view these notes.
- **Other:** Additional information about the client. Assessors, providers and clients can view these notes.

Providers can view the following notes:

- Client Story
- Other
- Observations.

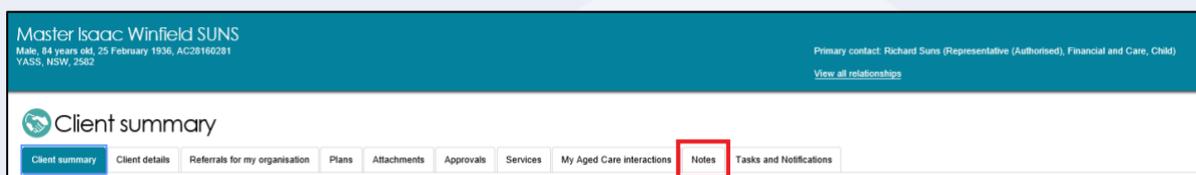
! When My Aged Care contact centre staff or assessors add a **Sensitive note** about a client, a flag will appear on the client record advising the provider to call the My Aged Care contact centre for more information.

Information on the content of the sensitive note will only be provided where relevant to the provider.



To add a note to the client record, follow the steps below.

1. Navigate to the client record and select **Notes**.



2. Notes already present on the client record will be displayed.

Select **Add a Note** and choose the note type and a description. Once this information is filled in, select **Save**. Alternatively, from the **Client details** tab, select **Add a note** from the **Current notes** section.

You can add Notes of type **Other** and **Observations** to the client record of any clients that have been referred to your outlet. For example, clients in your **Incoming referrals** tab.

The blue  is a help hint which explains the various note types and who gets to see them, as there is a different audience per note type.

Master Raymond Alvin JILLSON
Male, 89 years old, 16 March 1931, AC68661735
CARINDALE, QLD, 4152

Primary contact: Raymond Jillson (self) - 02 2913 5833
View all relationships

Notes

Client summary Client details Referrals for my organisation

Filter by

Sort by
Please select GO

ADD A NOTE

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

Type: * ?

End date:
(e.g. dd/mm/yyyy)

Description: *
(500 Characters) 0 / 500

SAVE CANCEL

Date created	End date	Note type	Description
12/09/2016		Other	We live in a world w
12/09/2016		Other	Cultures have long heard wisdom in nonhuman voices. Apollo (not of music) 92DF1LR72

- These notes will be visible to My Aged Care contact centre staff, assessors, and other providers delivering services to that client.

For further information about note types and who can view them, refer to information contained in the [Service and Support Portal User Guide - The client record](#) located on the Department's website.

Requesting an extension to the client's care

Providers can request a care extension via the Service and Support Portal. This request will be sent to the Assessment Delegate for approval.

Periods of Transition Care can be extended to a maximum of 42 consecutive days.

Periods of Residential Respite care can be extended for a maximum of 21 day non-consecutive periods.

All respite care approvals from non-My Aged Care systems can be extended in the Service and Support Portal. The use of the offline residential respite extension form will no longer be supported.

! A care extension may only be granted for the approved level of care. If a client needs a higher level of respite, they will require a new Respite Classification. This can be facilitated by requesting a Residential Respite Assessment in the MyAssessor App.

Care extensions are effective from the commencement date within the request pending the Assessment Delegate's approval. Extension requests cannot be backdated.

To request a care extension, follow the steps below.

1. Find the client you wish to request a care extension for, by navigating to the **Services in Place** tab and expanding the card or list view for the client and select **request <care type> extension** (care type referenced will vary depending on relevant extension type).

This button is only visible if the client is eligible for care extension.

The screenshot shows a client record for SWAN Kasa (Aged care user ID: AC29874864, Referred date: 17 Jul 2017, Service type: Transition Care, 8694, Priority: High). The record is divided into several sections: Client contact details, About this referral, Recommended service dates, About this service, and Service dates. At the bottom, there are four buttons: 'VIEW REFERRAL SUMMARY AND CLIENT RECORD', 'VIEW PDF OF CLIENT RECORD', 'REQUEST A REVIEW', and 'UPDATE SERVICE INFORMATION'. A red box highlights the 'REQUEST TRANSITION CARE EXTENSION' button.

Alternatively, locate the client through the **Find a client** functionality, and navigate to either the **Services** or **Approvals** tab of the client record and select **Request <care type> extension**.

The screenshot shows the 'Care approvals' page for a client. The 'Approvals' tab is selected and highlighted with a red box. The page displays the following information: 'Approvals' section stating the client is approved for care types under the Aged Care Act 1997; 'Current care approvals' section listing 'Home Care Package Level 4', 'Residential Respite Care', and 'Residential Permanent'; 'DHS prior approvals last updated: Never'; and 'Home care' section with details for 'Home Care Package Level 4 - Committed effective 12 July 2018', including package assigned date and status.

- Complete all mandatory information indicated in the extension request pop up. The heading of the pop up and the mandatory information will depend on the care type the extension relates to. Once completed, selected **Submit request**.

Request transition care extension ✕

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

You are about to request a transition care extension for Pingu PENGUIN

Date of original entry into transition care? (dd/mm/yyyy): *
12/07/2017 📅

Proposed number of extension days (between 1 to 42 days): *
42

Goals not achieved in 12 weeks of transition care: *
Example goal

Goals for Pingu PENGUIN during extension period *
Example goal

Team action required to achieve extension goals: *
Example goal

Outside services action required to achieve extension goals: *
Example goal

Information from other sources: *
Example information

Client consent was obtained for this extension:

SUBMIT REQUEST
CANCEL

- You will receive confirmation that the care extension request has been submitted to the Assessment Delegate.

✓

- Care approval extension request created.
- The assessment and support plan has been sent to the Delegate for their decision

✕

- You will also receive a notification that the request has been submitted, located in the Tasks and Notifications section of the client record, or the Tasks and Notifications tile of the portal. You will also receive a notification when the Assessment Delegate has made a decision on the care extension request.

Tasks and notifications

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

Filter by 🔍

Type	Due Date	Received Date	Category	Title/Description	Channel	Activity Id	Portal	Outlet
Task	13/08/2018		Client Services	Incomplete Service Information And there sat Sam looking cool and calm in the heart of the furnace roar And we wore a smile that you could see for a mile and he said And if I do Im asking that you wont refuse my last request With a corpse half hid that I couldnt get rid because of a promise given 00098210716And there sat Sam looking cool and calm in the heart of the furnace roar And we	1-4862409764		Service Provider Portal	Yass Valley Aged Care - Warrington Lodge
Task	26/04/2018		Client Services	Incomplete Service Information Cultures have long heard wisdom in nonhuman voices Apollo god of music medicine and knowledge came to Delphi in the form of a dolphin But dolphins which fill the oceans with blipping and chirping and whales which mew and caw in ultrasonic jazz a true rhapsody in blue are hunted to the edge of silence Jay Giffins Time flies like an arrow fruit flies like a banana Out on 01C42322 Assigned to: FEREDAY, Hugh	1-42293308531		Service Provider Portal	Yass Valley Aged Care - Horton House
Task	01/02/2018		Client Services	Incomplete Service Information And greasy smoke in an itky cloak went streaking across the sky And id often sing to that hateful thing and it would harken with a grin Imagination was given to man to compensate him for what he is not and a sense of humor was provided to console him for what he is 10412202350And greasy smoke in an itky cloak went streaking across the sky And id often sing to that hateful thing and it would harken with a grin Before I got married	1-37455088433		Service Provider Portal	Yass Valley Home Living Support Service 1

Requesting a review of a client's support plan

If a client's needs or circumstances have changed significantly since their last assessment and their support plan no longer reflects their current situation, you can request a review of the client's support plan. The assessor will conduct a review of the client's situation which may lead to a new assessment of the client's needs.

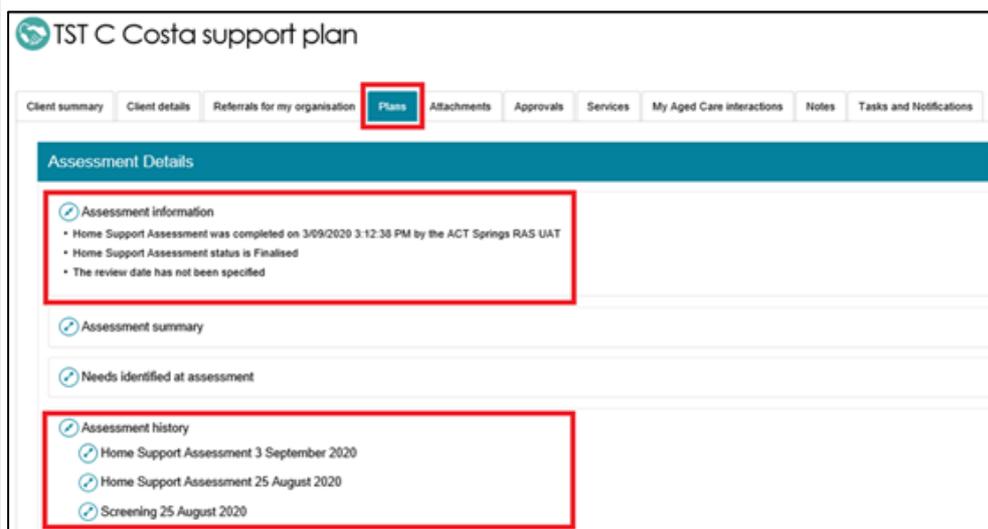


Providers are encouraged to contact the assessment organisation prior to submitting the request and to provide as much information as possible to explain the client's need for, and urgency of, a support plan review or new assessment. This information is available in the detailed assessment history information in the client's support plan in the **Plans** tab of the client record.

If a client has not previously had an assessment through My Aged Care, a request for review will be sent to the My Aged Care contact centre.

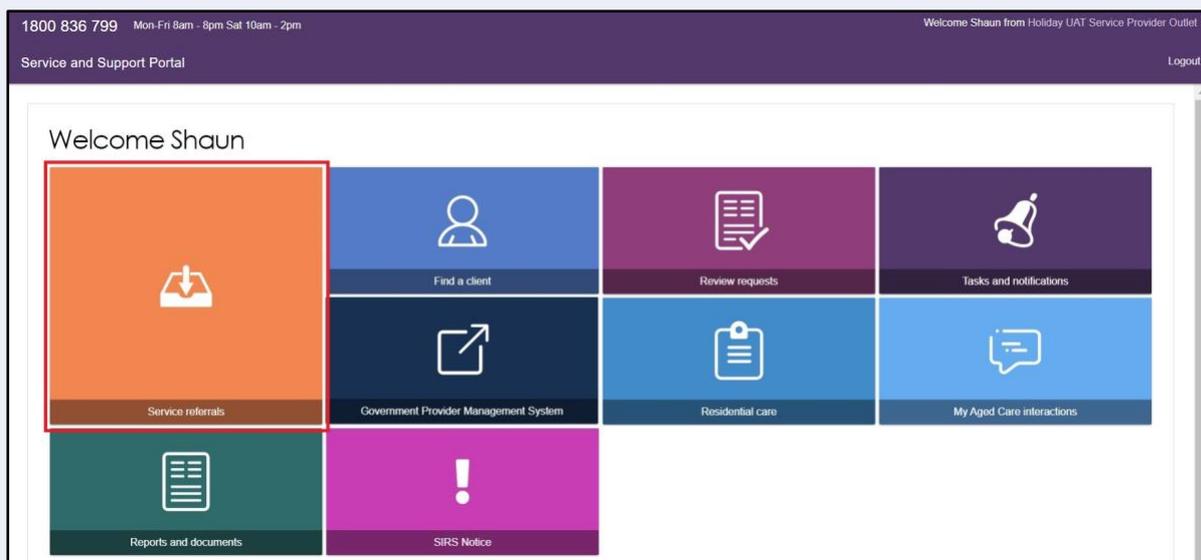
! You cannot submit a request for review if there is already an existing assigned review for the client in the assessor portal or an assessment is currently being undertaken. You should discuss the request with the assessor who conducted the client's most current assessment.

This information can be found in the client's **assessment information**, with more detailed information available in the **assessment history** in the support plan in the **Plans** tab of the client record.



To request a review of a client's support plan, follow the steps below.

1. Select **Service referrals** from the homepage.



2. Select **Services in place**, locate the client for whom you wish to request a review and select **Request a review**.

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

CARD LIST

Filter by

1 to 1 out of 1 matching result

Last name	First name	Aged care user ID	Commencement date	Referred date	Service type	Recommended start date	Priority
DENAFO	Vernon	AC38086799	19 Sep 2018	19 Sep 2018	Residential Permanent, 4321		Medium

Aged 83 (13 August 1935), Male

Client contact details
Preferred contact number 02 9506 5133

About this referral
Date issued 19 September 2018
Date accepted 19 September 2018
Outlet Aged Care Inc - Outlet 1
Referral comments No referral comments provided

About this service
Service type Residential Permanent
Service sub type No sub types
Service item name Residential Permanent - At Provider Location
Naps service id 4321
Service frequency 7 days per week

Service dates
Start date 19 September 2018
Planned end date None
Planned review date None
Service provider comments No provider comments provided

VIEW REFERRAL SUMMARY AND CLIENT RECORD | VIEW PDF OF CLIENT RECORD

REQUEST A REVIEW | UPDATE SERVICE INFORMATION

Alternatively, a link to request a review will display at the top of any page in the client's record.

Dr. TST C COSTA (Tommy)
Male, 73 years old, 4 October 1946, AC26460071
522 NORTHBOULDER AVENUE DOWRIES, ACT 2052

Primary contact: TST C Costa (self)
View all relationships

Client details

The client has not yet completed a wallet check. Conduct a wallet check now. Please remind TST C Costa 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

REQUEST A REVIEW | VIEW PDF OF CLIENT RECORD

ABOUT TOMMY

Personal information
Born 4 October 1946, Australian, born in Australia, married (registered facts), with partner
Status: Active

Identity documents (ID)
Aged Care ID: AC26460071
Identity Status: Identity records available | Not disclosed

3. Complete all mandatory fields within the review request.

- a) What circumstances have changed for the client?

If the client has a **Change in care needs** or **Change in caring arrangements**, or the client **Needs Transition Care**, **Needs Residential Care**, or **Needs Residential Respite** and you believe the client requires a direct comprehensive assessment rather than a Support Plan Review, there is a checkbox you can select that will explain the eligibility criteria.

If the client is eligible, you will be prompted to call the provider and assessor helpline to request a direct comprehensive assessment.

Home | Service Referrals | Request a review

Charles Citizen
Male, 80 years old, 1 July 1942, AC97921944 1 BETTONG AVENUE ACCESS THREDBO, ACT, 2914

Request a Review

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

Request details

What circumstances have changed for the client? *

Change in care needs

Does the client require and meet the requirements for a direct assessment? ? Yes

A client is eligible for a direct comprehensive assessment if they meet the following criteria:

- The client is at risk and has immediate unmet aged care needs and/or the client's carer arrangements are unsustainable, and
- The client needs assessment and approval for transition care or permanent residential care and/or residential respite care.

Please call the My Aged Care provider and assessor helpline on 1800 200 422 to progress a direct assessment for this client.

SEND REVIEW REQUEST | CANCEL



b) Does this request need to be actioned urgently?

If the client needs require urgent review, tick the **Yes** box and provide information in the reason field.

This will help the assessor or contact centre to prioritise the client's support plan review request.

Does this request need to be actioned urgently? Yes

Why does this request need to be actioned urgently? *

0 / 255

c) What type of subsidised aged care is the client receiving?

Primary reason for Support Plan Review Request

Depending on the answers, different questions will need to be completed at this step.

Captain Michael POLLOCK
Male, 87 years old, 19 April 1932, AC66879651 Lot Number 13 6 CRANE DRIVE BURONGA, NSW, 2739

Request a Review

All fields marked with an asterisk (*) must be completed before submission

Request details

What circumstances have changed for the client? *

How has this affected the client's need? *

Does this request need to be actioned urgently? Yes

What type of subsidised aged care is the client receiving? *

- Home Care Package (HCP)
- Commonwealth Home Support Programme (CHSP)
- Home Care Package and Commonwealth Home Support Programme
- Flexible Care
- Residential Care

Primary reason for Support Plan Review Request *

- Request for additional CHSP services or changes to CHSP services for clients who are only receiving CHSP services currently
- Request for additional CHSP services for clients who are in receipt of a HCP
- There is a change in a client's circumstances and they have an immediate need for access to Home Care Package services
- There is a significant change in the client's needs and additional Aged Care Act 1997 (the Act) based aged care services are required

Please identify what services the client is currently receiving. *

0 / 250

- d) If the client is receiving a home care package or combination of home care package and Commonwealth Home Support Programme (CHSP), it will be mandatory for a care plan and budget to be attached to the review request.

The request will not be able to be submitted without this information.

Primary reason for Support Plan Review Request *

Request for additional CHSP services or changes to CHSP services for clients who are only receiving CHSP services currently ?

Request for additional CHSP services for clients who are in receipt of a HCP ?

There is a change in a client's circumstances and they have an immediate need for access to Home Care Package services ?

There is a significant change in the client's needs and additional Aged Care Act 1997 (the Act) based aged care services are required ?

Please Identify what services the client is currently receiving. * ?

0 / 250

Please identify options explored with client to increase their current support. * ?

0 / 250

Please provide a copy of the client's care plan and individualised budget. * ?

ADD CARE PLAN **ADD BUDGET**

4. Select browse to choose a document for upload.

Complete all mandatory fields and click **upload** to complete.

Add a care plan

Please note: Some attachments will be viewable by other people with authorised access to this client record. Please refer to your portal guide for details.

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

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 *

File: *
\\central.health\dfsuseren Browse...

Name of the attachment: *
Care Plan

Type of document: *
SP Care Plan

Please provide a short description about the contents of the attachment, e.g. assessment date and time
(250 characters)

0 / 250

UPLOAD **CANCEL**

5. Once the documents are successfully uploaded, they will display in the review request.



Clicking the **bin** icon next to the attachment name will remove the attachment from the review request. A confirmation message will not display.

Primary reason for Support Plan Review Request *

Request for additional CHSP services or changes to CHSP services for clients who are only receiving CHSP services currently 

Request for additional CHSP services for clients who are in receipt of a HCP 

There is a change in a client's circumstances and they have an immediate need for access to Home Care Package services 

There is a significant change in the client's needs and additional Aged Care Act 1997 (the Act) based aged care services are required 

Please Identify what services the client is currently receiving. * 

0 / 250

Please identify options explored with client to increase their current support. * 

0 / 250

Please provide a copy of the client's care plan and individualised budget. * 

Care plan: Care Plan.docx 

Individualised budget: Budget.docx 

6. Once all mandatory fields have been completed, select **I have reviewed the information on this page and I confirm that it is correct** then select **SEND REVIEW REQUEST** to submit the review request to the most recent assessment organisation.

I have reviewed the information on this page and I confirm that it is correct. *

SEND REVIEW REQUEST

7. A confirmation will display if the request is submitted successfully.

For more information and support

Further information is available from [Service and Support Portal User Guide: Part 2 Team Leader and Staff Member Functions](#) on the Department's website.

For further information about a client's support plan review, refer to [When to request a Support Plan Review from an Assessor fact sheet](#), available on the Department's website.

The My Aged Care service provider and assessor helpline is available on 1800 836 799.

