



# Service and Support Portal User Guide - The client record

This user guide is for Staff Members or Team Leaders within the My Aged Care Service and Support Portal.

It explains how to search for and view information in the client record.

The client record contains client details, service referral details, assessment information, documents attached to the client record, care approval information, service delivery information, client interactions with My Aged Care and all notes created about the client.

A Team Leader can also perform all the functions of a Staff Member.

This guide contains the following topics:

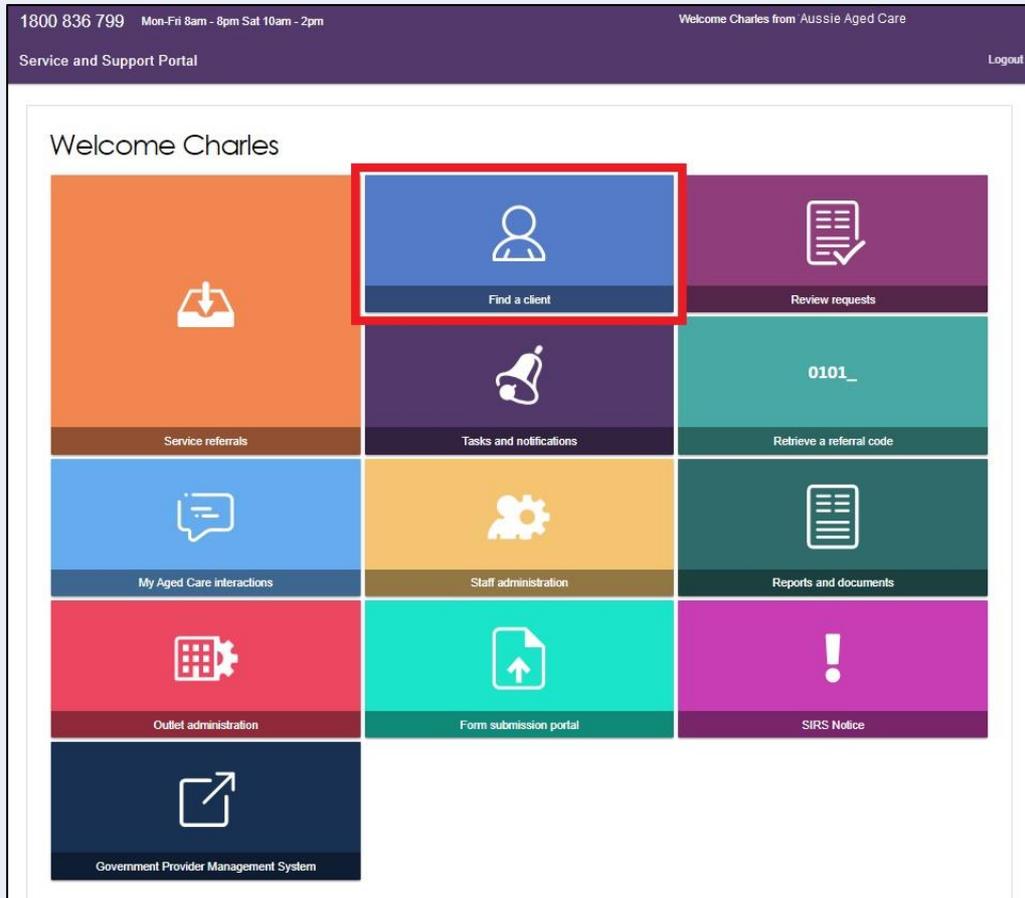
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## Finding a client

To find a client who has been referred to or accepted to service by your organisation, follow the procedure below.

1. Select **Find a client** from the home page.



2. You can do a basic search by entering First Name, Last Name or Aged Care User ID and selecting **SEARCH**. To display more search fields, you can select **ADVANCED SEARCH**.

The screenshot shows the 'Find a client' search interface. At the top left, there is a person icon and the text 'Find a client'. Below this, there is a 'Search by' section with three input fields: 'Last name', 'First name', and 'Aged Care user ID'. Underneath the input fields, there are two buttons: 'ADVANCED SEARCH' and 'CLEAR FILTERS'. At the bottom left, there is a 'SEARCH' button highlighted with a red box, and a 'CLEAR' button next to it.

- Any recently viewed clients will be displayed under the heading **Recently Viewed Persons** on the **Find a client** page. Selecting a client's name will take you directly to the client record.

Any matching results will be displayed.

The screenshot shows the 'Find a client' interface. At the top left is a user icon and the text 'Find a client'. Below this is a search section with the heading 'Search by' and three input fields: 'Last name', 'First name', and 'Aged Care user ID'. There are buttons for 'ADVANCED SEARCH', 'CLEAR FILTERS', 'SEARCH', and 'CLEAR'. On the right side, there are 'CARD' and 'LIST' view toggles. A red box highlights a 'Recently Viewed Persons' section containing two entries: 'Jim LAPA AC59468041' and 'John CITIZEN AC38043295'.

- The Advanced Search allows you to search using more filters, and to combine filters.

The filters available include:

- Aged Care Management Payment System (ACMPS) number
- Centrelink Customer Reference Number (CRN)
- Client status
- Date of birth
- Department of Veterans' Affairs (DVA) card number
- Home contact number
- Locality
- Medicare Card number
- Postcode
- Preferred name
- State
- Suburb
- System for the Payment of Aged Residential Care (SPARC) number.

This screenshot shows the 'Find a client' page with the 'ADVANCED SEARCH' button highlighted by a red box. A modal window titled 'Search clients' is open, displaying a list of filter options. A red box highlights the list of filters, which includes: 'Choose an item', 'Aged Care Management Payment System (ACMPS) number', 'Aged Care user ID', 'Centrelink Customer Reference Number (CRN)', 'Client status', 'Date of birth', 'Department of Veterans' Affairs (DVA) card number', 'First name', 'Home contact number', 'Last name', 'Locality', 'Medicare card number', 'Postcode', 'Preferred name', 'State', 'Suburb', and 'System for the Payment of Aged Residential Care (SPARC) number'. The modal also features 'ADD FILTER', 'SAVE FILTER', 'CLEAR FILTER', 'FILTER', and 'CANCEL' buttons.



## List view

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

Service and Support Portal

Review requests Service referrals Retrieve a referral code Residential care Find a client Reports and documents Tasks and notifications My Aged Care interactions Logout

Home | Service referrals

### Incoming referrals

Incoming referrals Waitlist Accepted services pending Services in place Referral history

Filter by

1 to 17 out of 17 matching results

Last name	First name	Aged care user ID	Due date	Referred date	Service type	Recommended start date	Priority
CLIENT	Clara	AC89174403	28 Jul 2019	26 Jul 2019	Transition Care, 6297: After Hospital Care, Other Transition Services		High (747 days overdue)

Aged 93 (24 May 1929) Female

ASHGROVE, QLD, 4060

**About this referral**

Outlet: ABC Healthcare

Date referred: 26 July 2019

Date due: 28 July 2019

Referral comments:

**About this service**

Service type: Transition Care

Service sub type: After Hospital Care, Other Transition Services

Service item name: ABC Healthcare

Tags service id: 6297

**Approval details**

Approval start date: 26 July 2019

Entry period end date: 23 August 2019

VIEW REFERRAL SUMMARY AND CLIENT RECORD

ACCEPT REFERRAL REJECT REFERRAL

## 2. The Referrals for my organisation page will be displayed.

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

Service and Support Portal

Review requests Service referrals Retrieve a referral code Residential care Find a client Reports and documents Tasks and notifications My Aged Care interactions Quality indicators Logout

Home | Service referrals | Client referrals

### Cassius CLIENT

Male, 70 years old, 22 March 1946, AC68085539  
Lot Number 27, SCLINCY STREET, ZILLMERE, QLD, 4034

Primary contact: Cassius Client (self) - 0412345678  
No support relationships recorded

### Referral summary for Cassius CLIENT

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

#### Referrals for my organisation

Residential Permanent

Referral Accepted on 23 June 2022

**About this referral**

Issued Date: 24 January 2022

Due Date: 1 March 2022

Priority: Low

## What information is in the client record?

The client record contains client information displayed across 11 tabs, which are described in more detail below.

The client record contains tabs with the following information:

- Client Summary
- Client Details
- Support network
- Referrals for my Organisation
- Plans
- Attachments
- Approvals
- Services
- My Aged Care interactions
- Notes
- Tasks and Notifications
- Residential Care.



## Client Summary

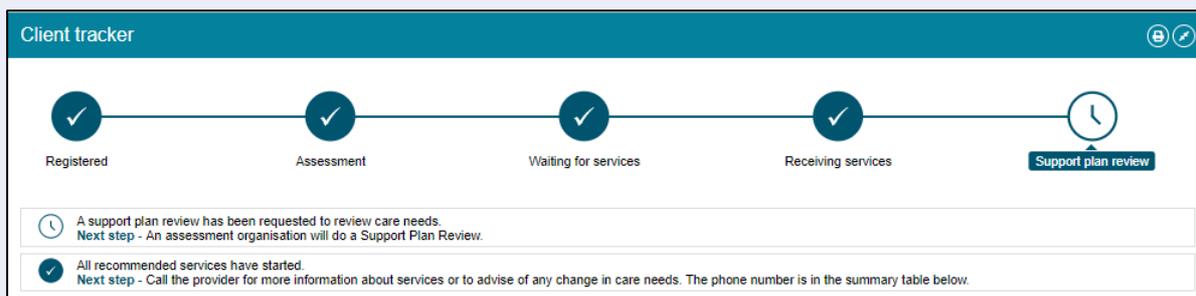
Client summary	Client details	Support Network	Referrals for my organisation	Plans	Attachments
Approvals	Services	My Aged Care interactions	Notes	Tasks and Notifications	Residential Care

The Client summary tab contains a real-time client journey tracker (Client tracker) and a dashboard of key information (Client summary) about the client's interactions with My Aged Care.

The Client tracker is a visual display of what stage a client is at in their My Aged Care journey, including the client's current position and any next steps that need to be taken by the client.

The stages of the tracker are:

1. Registered (client has been registered with My Aged Care).
2. Assessment (client has had an assessment or are having an assessment to determine their care needs).
3. Waiting for services (client has had an assessment and has been recommended for services).
4. Receiving services (a provider has accepted the client's service referral and commenced services).
5. Support Plan Review (client is undergoing review by an aged care needs assessor (assessor)).



The Client summary provides information about the client's interactions with My Aged Care, including:

- Assessments.
- Approvals.
- Service recommendations.
- Service delivery status.
- Client goals.
- Reablement and linking support periods (where available).

The Client tracker and Client summary information can be printed in a similar format as it is displayed within the portal by using the print page button on the right-hand side of each heading.

The Client Tracker will be collapsed by default and can be expanded using the double arrow icon to the right of the heading.

## Client Details

The Client details page contains basic demographic and contact information about the client. It is where you can view high-level details about any active support plans, services, current notes and the client's primary contact details.

The page also contains an option to notify My Aged Care when the client is deceased.

The 'Primary contact' is by default the client, but can also be nominated by the client or their agent or representative. This information allows assessors, My Aged Care contact centre staff and service providers to identify the key contact details for a client. This field does not have a bearing on system generated mail correspondence the client may receive in relation to their care.

To update the Primary Contact, or any other client details, select the pencil icon

### Primary Contact

This is who My Aged Care will contact first

Jack HELPER

Agent, Other

0400 000 000 (Mobile)



My Aged Care clients and their support network can also receive email and/or SMS notifications when a client reaches the following key stages of their My Aged Care journey.

- a) Client registration is complete.
- b) The client's assessment is finalised.
- c) The client is approved for care after a comprehensive assessment.
- d) A client is assigned a Home Care Package, and at all stages where a HCP letter would be generated for a client, such as an assignment letter or withdrawal letter. Clients, their representatives, and relevant support people are automatically opted in to receive copies of Home Care Package letters. Regular representatives can opt out of receiving these letters by calling My Aged Care. When a Home Care Package letter is generated, a notification will be sent to the affected client, representative and/or agent.
- e) A Support Plan Review request has been submitted.
- f) A support relationship is activated, declined, inactivated or expiring, and the submission or action of documents relating to support relationships.

! If a client's status is **Deceased**, the client's record will be read-only, and you will not be able to edit any client information. Additional notes and attachments can be attached to the client record and assessments can be finalised after the status is changed.

A banner will be displayed on all tabs of the client record indicating the client's new deceased status. If the client's status is incorrect, please contact the Service Provider and Assessor Helpline on 1800 836 799.



The Department has been notified that this client is deceased. Please contact us on 1800-836-799 if this is incorrect.

## Support Network

Client summary	Client details	<b>Support Network</b>	Referrals for my organisation	Plans	Attachments
Approvals	Services	My Aged Care interactions	Notes	Tasks and Notifications	Residential Care

The **Support Network** tab contains information about current relationships between the client and people who assist them in their aged care journey.

The relationships that could be considered part of a client's **Support Network** are as follows:

- a) Representatives (individuals and organisations)
- b) Agents (individuals and organisations)
- c) Carers
- d) Emergency Contacts
- e) GPs
- f) Support Persons

Authorised representatives are able to opt the client out from receiving letters but they themselves cannot opt out.

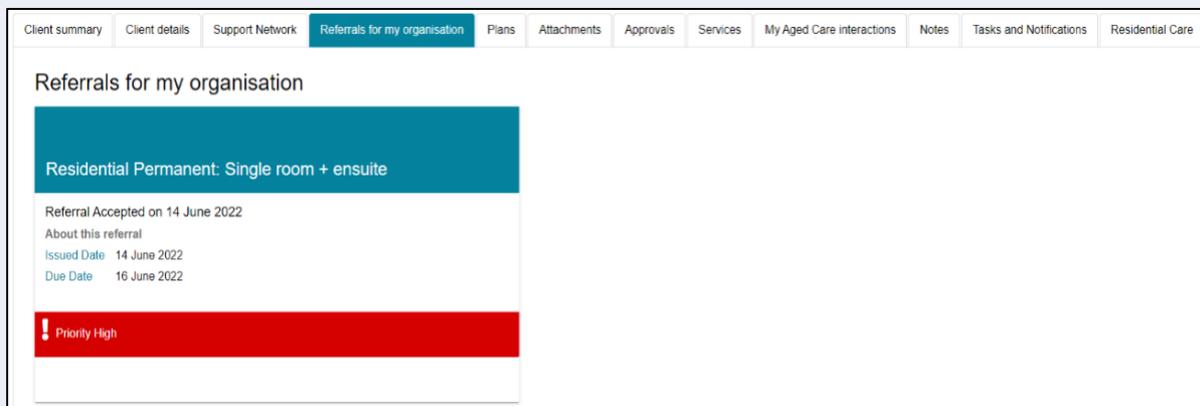
The **Support Network** tab also allows providers to notify My Aged Care of the death of a person with a listed relationship with the client.



Any carer relationships made in the Support Network tab are able to request call backs from the [Carer Gateway](#) and the [Dementia Australia - National Dementia Helpline](#).

## Referrals for my organisation

The **Referrals for my organisation** tab displays service referrals that have been issued to or accepted by your organisation.

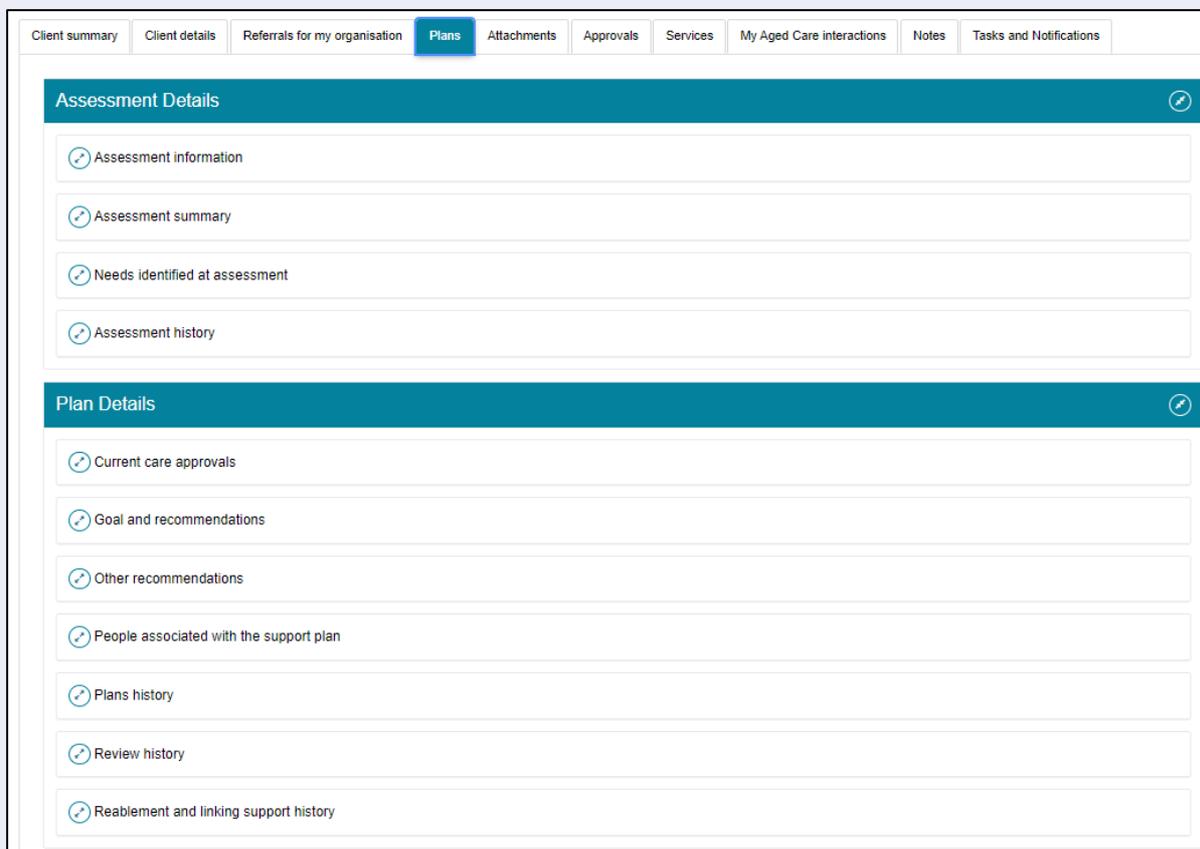


The screenshot shows a navigation bar with tabs: Client summary, Client details, Support Network, Referrals for my organisation (selected), Plans, Attachments, Approvals, Services, My Aged Care interactions, Notes, Tasks and Notifications, and Residential Care. Below the navigation bar, the heading 'Referrals for my organisation' is displayed. A teal box contains the text 'Residential Permanent: Single room + ensuite'. Below this, it states 'Referral Accepted on 14 June 2022'. A section titled 'About this referral' includes 'Issued Date 14 June 2022' and 'Due Date 16 June 2022'. A red box with a white exclamation mark icon and the text 'Priority High' is also visible.

## Plans

The **Plans** tab contains detailed information about current and previous screening and assessments the client may have had, including client goals, recommendations and motivations, as well as the support plan.

Select the double arrow icon next to each heading to display detailed information captured during the assessment.



The screenshot shows the 'Plans' tab selected in the navigation bar. The main content area is divided into two sections: 'Assessment Details' and 'Plan Details'. Each section has a teal header with a double arrow icon on the right. Under 'Assessment Details', there are four expandable items: 'Assessment information', 'Assessment summary', 'Needs identified at assessment', and 'Assessment history'. Under 'Plan Details', there are seven expandable items: 'Current care approvals', 'Goal and recommendations', 'Other recommendations', 'People associated with the support plan', 'Plans history', 'Review history', and 'Reablement and linking support history'.

Providers will be able to access read-only versions of a client's support plan and previous screening and assessments. This information can be printed, if required.






**NATIONAL SCREENING  
AND ASSESSMENT FORM  
COMPREHENSIVE ASSESSMENT**

**Clara Client**  
**Aged Care ID:** AC06928923    **Date of Birth:** 26/10/1940    **Age:** 77 years

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**Client Details**

<b>Medicare Card</b>	N/A	<b>DVA Number</b>	N/A
<b>Email Address</b>	N/A		
<b>Preferred Phone</b>	Mobile		
<b>Phone – home</b>	N/A	<b>Phone – mobile</b>	+610409811030
<b>Phone – business</b>	N/A	<b>Phone – other</b>	N/A

**Addresses**

Address Type	Address
Home	1 Customer Street, Sydney NSW 2000

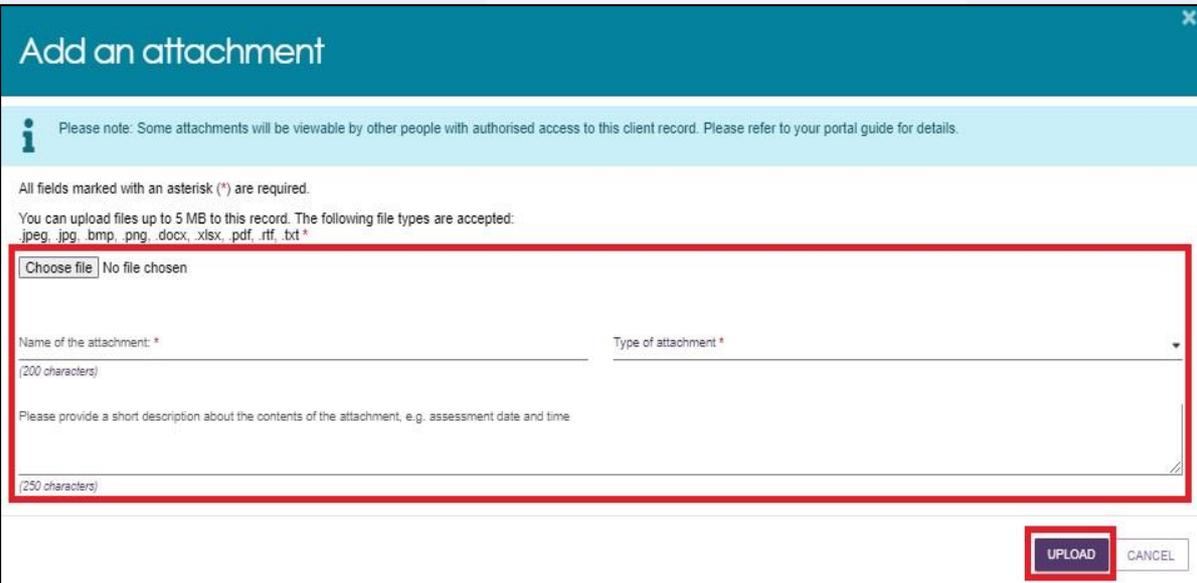
## Attachments

The **Attachments** tab contains documents that have been attached to the client record. This is also where service providers can add an attachment to the client record.

To upload an attachment to the client record, select **ADD AN ATTACHMENT** from this tab.



Add the attachment by selecting **Browse**. Enter the required information, including name of the attachment and the type of document. Select **UPLOAD** to add it to the client record.



**Add an attachment**

**i** 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 \*

No file chosen

Name of the attachment: \*  Type of attachment: \*

(200 characters)

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

(250 characters)



There are many types of attachments available from the Type of attachment drop down menu:

**Assessment Attachments** are any documents that are relevant to the client's assessment, for example, clinical notes or a discharge summary.

**Other Attachments** are documents that relate to the client's general circumstances, for instance, documents related to the establishment of a support relationship (including legal documentation and the Appointment of Support Person Form, Appointment of Support Organisation Form); Occupational Therapist drawings used in home modifications, etc.

**Correspondence** are documents/letters that are generated in My Aged Care, related to Home Care Packages. There are a number of letters sent to clients related to their Home Care Package at different stages. Copies of these letters will also be sent to their representative/s.

**Sensitive Attachments** are documents that contain client information of a sensitive nature. For example, documents about a client's financial situation, safety concerns and legal issues that may impact provision of services.

! Where a client record has a **Sensitive Attachment**, provider(s) who have received a referral for or are providing services to a client will be notified that a Sensitive Attachment exists for the client.

Contact the assessor, or the My Aged Care provider and assessor helpline to obtain further information about the Sensitive Attachment.

If an attachment has been uploaded in error, please contact the My Aged Care service provider and assessor helpline on 1800 836 799 for deletion.

## Approvals

The **Approvals** tab contains a view of a client's approvals for aged care services under the *Aged Care Act 1997*. This includes a client's current approvals and also previous approvals that existed prior to the start of My Aged Care where the record has been linked with Services Australia systems (such as Centrelink and Medicare).

The screenshot shows the 'Approvals' tab selected in a navigation menu. The menu includes: Client summary, Client details, Support Network, Referrals for my organisation, Plans, Attachments, Approvals (highlighted), and Services. Below the menu, there are sub-tabs: My Aged Care interactions, Notes, Tasks and Notifications, and Residential Care. The main content area is titled 'Approvals' and contains the text: 'The client is approved for the following care types under the Aged Care Act 1997.' Underneath, there is a section for 'Current care approvals' with a list item 'Residential Permanent' and a status 'DHS prior approvals last updated: Never'. A purple arrow icon is visible in the bottom right corner of the screenshot.

! If a client has a Home Care Package approval, the details of pending packages and assigned packages will be displayed from underneath Current care approvals. Further details of the changes to Home Care Packages can be found on the [Home Care Packages Program reforms](#) page on the Department's website.

**Package pending (not assigned)**  
 Agreed minimum package Home Care Package Level 2

Request for Home Care Package Level 4  
 Priority for home care services Medium  
 Expected time to approved package Calculation Pending for Home Care Package Level 4   
 Interim package Home Care Package Level 2 assigned on 19 February 2019

[NOT SEEKING SERVICES](#)

**Assigned package awaiting take-up**

Interim Home Care Package Level 2 - Take-up by 16 April 2019  
 Package assigned 19 February 2019  
 Take-up deadline 16 April 2019  
 Status Assigned effective 19 February 2019 with reason: Package Assigned

[EXTEND RESPONSE PERIOD](#) [DECLINE - NO LONGER SEEKING SERVICES](#) [DECLINE INTERIM PACKAGE](#) [VIEW HISTORY](#)

## Services

The **Services** tab contains a record of:

- Services the client is currently receiving
- Services that are pending (Not yet in place)
- Service referrals yet to be accepted
- Previous services the client has received
- Services from other systems (not managed by My Aged Care).

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](#)

[Referrals](#)

[Previous services](#)

The following screenshot shows an example of a client's current services in place.

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

[Current services in place](#)

**Residential Permanent**

Service provided by **Aussie Aged Care**

<b>About this referral</b>	<b>From the assessor</b>	<b>From the service provider</b>
<b>Referral details</b>	<b>Approval details</b>	<b>About the service</b>
Accepted 5 July 2022 1:41 pm	Approval start date 5 July 2022	Service frequency 4 days per week
		<b>Service dates</b>
		Start date 5 July 2022



## My Aged Care interactions

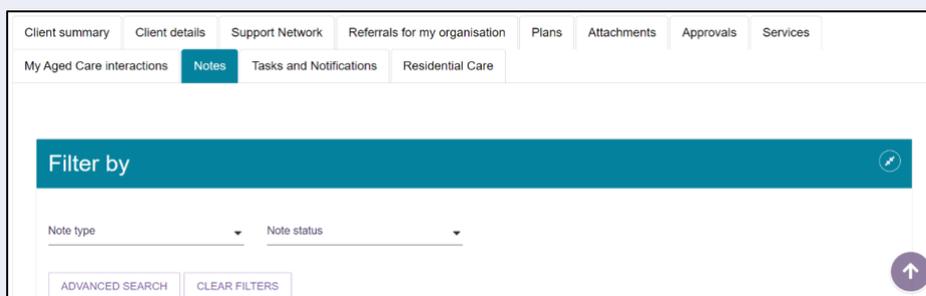
The **My Aged Care Interactions** tab will show the client's history of interactions with My Aged Care, for example, a phone call to the My Aged Care contact centre.

For clients and carers, it may also show the history of interactions with the Carer Gateway and the National Dementia Helpline.



## Notes

The **Notes** tab contains notes that have been created about the client.



There are different types of notes, listed in the table below.

Note type	Who can add?	Who can view?	Description	Examples
<b>Client story</b>	Assessor	Client Assessor Provider	A summary of the client's current circumstances.	Mrs Jones has just been discharged from hospital and is seeking help at home.  Lives with her husband and has early onset dementia.
<b>Observations</b>	Provider Assessor	Provider Assessor	Observations from service provider and/or assessors' interactions with the client.	There is a dog on the property.  Mrs Smith seems more energetic than she did during my last visit.
<b>Other</b>	Client Provider Assessor	Client Provider Assessor	Additional information about the client.	Jennifer has planned respite on 01/08/2017.

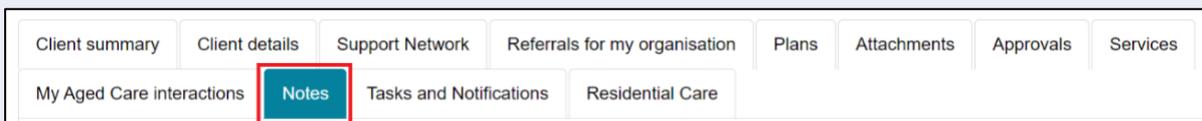
! When the My Aged Care contact centre staff or assessors add a Sensitive note about a client from their respective portals, all service providers who are sent a referral will see a flag informing them that there is a sensitive note about the client and instructing them to call the My Aged Care contact centre for more information.



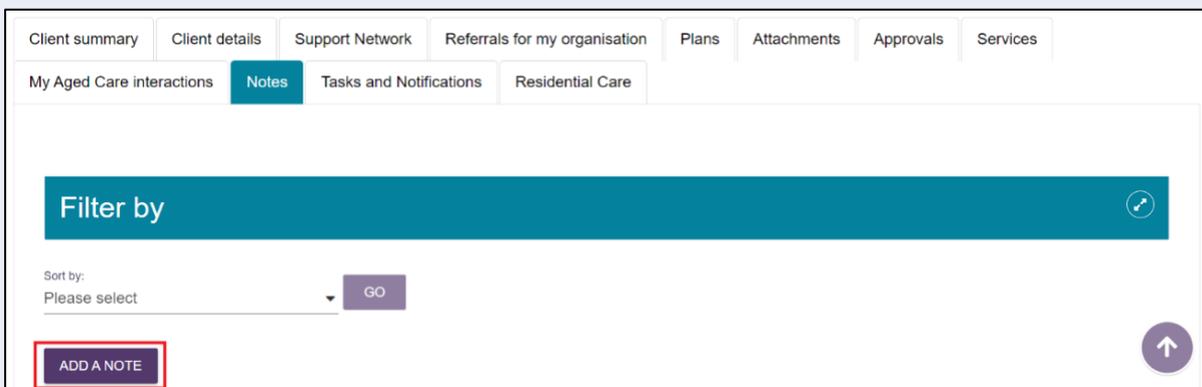
## Viewing and adding client notes

To add client notes, follow the steps below.

1. To add and view Client notes, navigate to the **Notes** tab from the client record.



2. From the **Notes** tabs, you can view notes about the client, and select **ADD A NOTE**.



3. From the pop-up box, select a note type, and add a description of the note. Select **SAVE** once complete.

A help icon  in the pop-up box provides information about the different types of notes to help assessors and service providers select the appropriate category.

Providers, staff members and team leaders using the Service and Support Portal cannot edit, delete or inactivate notes.

## Tasks and notifications

The **Tasks and Notifications** tab will display all tasks and notifications for a single client.

You will only be able to see tasks and notifications that are associated to your outlet and for clients you are providing services to.

Assessors will be able to see all tasks and notifications for clients.

An example of a notification is of a New Referral between a client and their Service and Support outlet.

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

Service and Support Portal

Home | Tasks and notifications

### Tasks and notifications

Tasks Notifications HCP Notifications Maximum HCP wait times

Filter by

Last name First name Aged Care user ID

MODIFY FILTER OPTIONS CLEAR FILTERS

Date received is after 19 January 2023 and Outlet name is Aussie Aged Care

FILTER CLEAR

Select all

Received	Category	Title/Description	Channel	Aged Care User ID	Client name	Select	Remove
17 February 2023	Referrals	<b>New Referral</b> You have a new referral from My Aged Care. Referral created at : 17/02/2023 11:21 Aged Care User Id: AC30117535 Outlet Name : Aussie Aged Care Service Type - Residential Permanent Priority: Low Activity Id: 2-77987306570 Go to: <a href="#">Incoming Referrals</a>		AC30117535	Cathy Client	<input type="checkbox"/>	

## Residential Care

This section shows information for clients who are in Residential Permanent Care or Residential Respite Care and has received an Australian National Aged Care Classification (AN-ACC) assessment or is currently undergoing an AN-ACC assessment.

For more information refer to the [Residential aged care funding reform](#) page.

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 Classification (Active)

**Residential Permanent 14 June 2022 - Present**  
AN-ACC Classification : Class 99

### Classification History

Residential Permanent

AN-ACC Classification : Class 99 (Active) : 14 June 2022 - Present



## For more information or support

Further information is available from the [My Aged Care for service providers](#) page on the Department's website.

The My Aged Care service provider and assessor helpline is available by calling 1800 836 799 from 8 am to 8 pm Monday to Friday or 10 am to 2 pm on Saturday.

