



# My Aged Care Assessor Portal - Organisation Administrator User Guide

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# 1 Background and Overview of the Assessor Portal

## 1.1 Purpose of the Guide

The My Aged Care Organisation Administrator User Guide outlines how assessment organisation administrators as part of the Single Assessment System interact with the My Aged Care assessor portal (the assessor portal).

The Administrator User Guide is for assessment organisations that conduct aged care needs assessments and/or residential aged care funding assessments.

The Administrator User Guide provides an overview of the portal and describes the functions that an individual with the Administrator role in the assessor portal can perform. This includes:

- Managing outlet information
- Creating and maintaining staff accounts
- Requesting changes to contractual information.

The Administrator User Guide does not cover:

- Detailed instructions on how to set up organisations in the Relationship Authorisation Manager, which can be found on the [RAM website](#).
- Detailed instructions on functions that an individual with the Team Leader, Assessor, Delegate or Delegate support role in the assessor portal can perform, which can be found on the departments [My Aged Care - Assessor Portal Resources](#) webpage.
- For detailed instructions on functions that residential funding assessors perform, refer to the dedicated [Aged Care Assessor App User Guide](#).

## 1.2 Privacy Requirements

Assessment organisations are required to comply with the legislative requirements under the *Privacy Act 1988* (Privacy Act), including the Australian Privacy Principles (APPs) when handling personal information in the assessor portal. The Privacy Act regulates the handling of personal information about individuals, including the collection, use, storage and disclosure of personal information, and access to and correction of that information. Clinical aged care needs assessors (clinical needs assessor) are also required to comply with the Division 86 of the *Aged Care Act 1997* (Aged Care Act) when using the assessor portal.

## 1.3 Introduction to Using the Assessor Portal

The assessor portal is used to:

- Create and manage staff records
- Activating the Aged Care Assessor App
- Manage referrals for assessments issued by the My Aged Care contact centre, Aged Care Specialist Officers, through the My Aged Care website or via the General Practitioner (GP) e-Referral form
- Create, access and update client records, including setting up representative/s and others in the client's support network
- Conduct Triage and assessments using the Integrated Assessment Tool (IAT)

- Develop client support plans
- Support Delegation processes (after comprehensive assessments)
- Refer clients for aged care services or further assessment
- View the progress of Residential Aged Care (RAC) Funding Assessments
- Access forms (such as My Aged Care Assessment Consent form) and reports
- View and manage tasks and notifications, including from other My Aged Care portals
- Find a Service Provider and view their information.

Assessment organisations can also use the offline Aged Care Assessor App or a printed version of the IAT to support aged care needs assessments conducted in circumstances where the assessor does not have access to the internet.

For further information about the Aged Care Assessor App please refer to the [Aged Care Assessor Application User Guide](#). The printed version of the IAT can be downloaded from the Reports and documents tab in the assessor portal.

**!** myID is the primary login option for assessors to securely access and use the assessor portal.

To access the assessor portal, staff must have an individual myID and be authorised to act on behalf of their organisation through the [Relationship Authorisation Manager \(RAM\)](#) service.

VANguard Federated Authentication Service (VANguard FAS) is an alternative login option for organisations with corporate network structure that includes a Single Sign On System (e.g. Active Directory Federation Service).

For more information regarding accessing the assessor portal please visit [Logging in to the Aged Care Systems](#).

## 1.4 How and when to direct people to My Aged Care

To access government funded aged care services, a person must have a client record on the My Aged Care system. Clients can create their own My Aged Care record. The My Aged Care contact centre, Aged Care Specialist Officers (ACSOs) and assessors can help create client records for people seeking aged care services.

Aged care needs assessors (needs assessors) and RAC funding assessors can register clients in My Aged Care if approached and the client does not have a client record. Assessment organisations cannot receive assessment referrals for a client not registered in My Aged Care. This could occur in a variety of circumstances. For example, a needs assessor is in a client's home undertaking an assessment, and they determine that their partner, who is not registered with My Aged Care, also requires an assessment.

Needs assessors and RAC funding assessors can register and self-refer clients for assessment in the assessor portal.

These processes are described in [My Aged Care – Assessor Portal User Guide 1 – Registering and referring clients for assessments](#).

## 2 Assessor Portal Access

To access the assessor portal, each staff member must have a My Aged Care portal user account linked to a supported third-party authentication service.

For more information regarding setting up users and logging into the system please refer to [Logging in to the Aged Care Systems](#).

## 3 Assessment Organisation Configuration in the Assessor Portal

People with the Organisation Administrator role in the assessor portal are responsible for ensuring that the information about the assessment services their organisation delivers is accurate.

### 3.1 Overview

! The Department will create and manage outlets on behalf of Assessment Organisations. It is recommended that you contact the Department for any changes to your assessment organisation structure.

Multiple ACPRs make up a designated Service Area. For example, if an organisation operates in Service Area - NSW 1 - they will be responsible for three outlets (Northern Sydney, Western Sydney and Inner West) reflecting the three ACPRs that are in the NSW 1 make up the relevant Service Area. Following are the examples of an organisation structure in MY aged Care.

**Example 1:** If an organisation called ABC Ltd. providing Aged Care needs assessment (Home Support Assessment & Comprehensive Assessment) operates in the Service Area - NSW 1 - they will have three outlets (Northern Sydney, Western Sydney and Inner West) reflecting the ACPRs(Aged Care Planning Regions) that make up that Service Area as depicted in figure 1

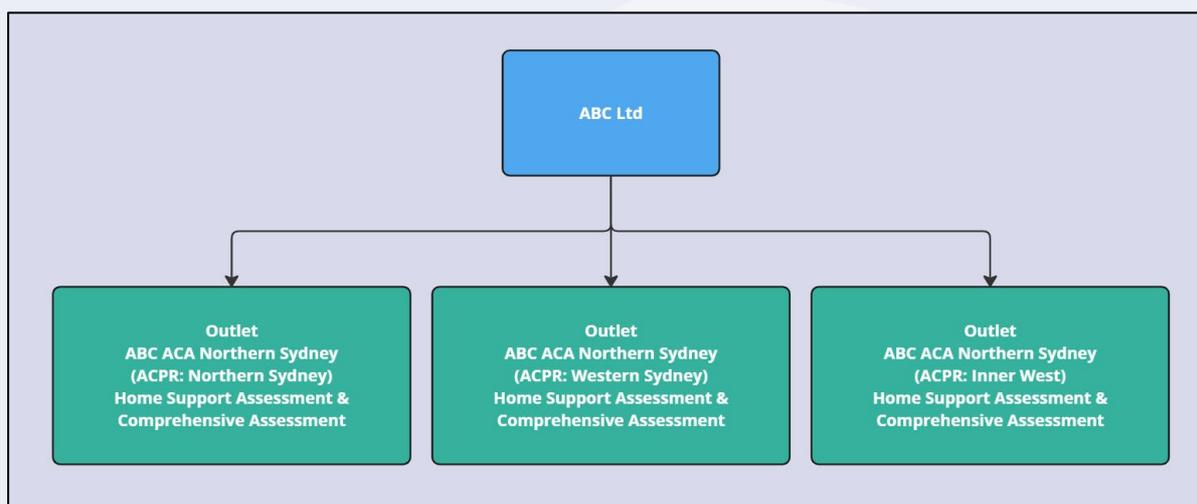


Figure 1

**Example 2:** If an organisation called ABC Ltd. providing Aged Care needs assessment (Home Support Assessment & Comprehensive Assessment) and Residential aged care funding assessment operates in the Service Area - VIC 4 - they will have four outlets with two outlets for Aged Care needs assessment (Home Support Assessment & Comprehensive Assessment) and two outlets for Residential aged care assessment services (Hume and Gippsland) reflecting the ACPRs(Aged Care Planning Regions) that make up that Service Area as depicted in figure 2

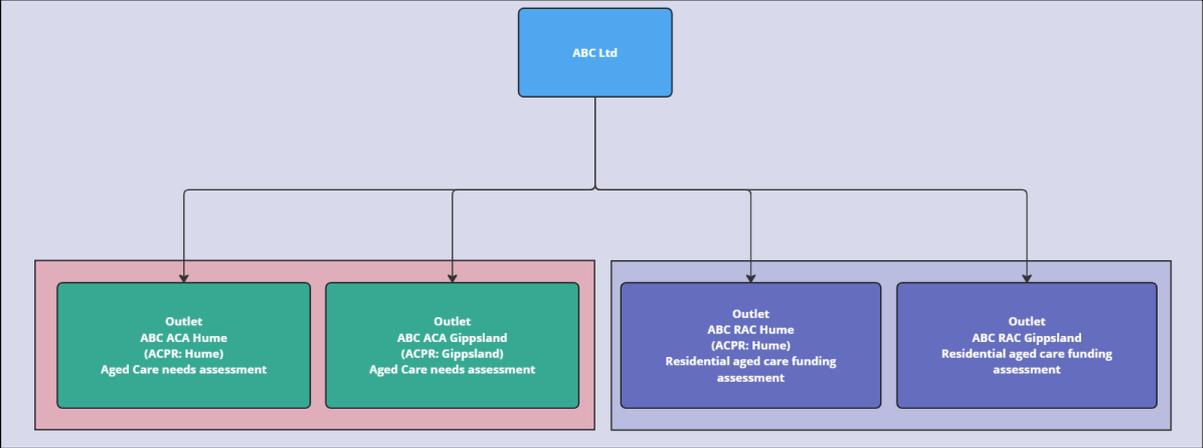


Figure 2

**Outlet name:**

The department will establish consistent naming for the outlets. Organisation administrator should not change the outlet names.

One Outlet per ACPR with assessment services for aged care needs assessments (ACA) i.e. (home support and comprehensive assessments).

**“Organisation name - ACA - ACPR region”**

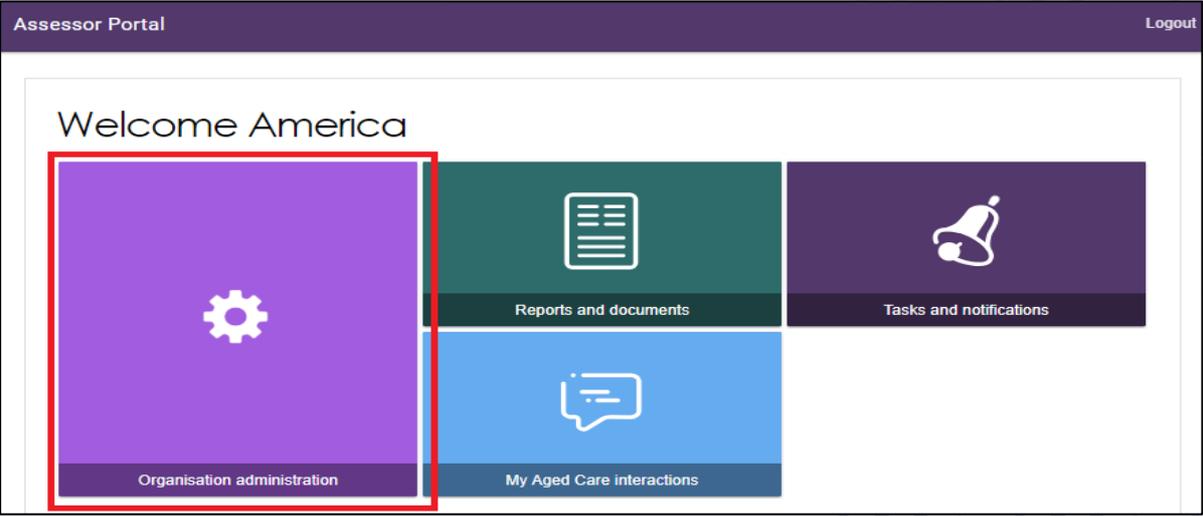
One Outlet per ACPR with assessment services for Residential aged care funding Assessments (RAC).

**“Organisation name - RAC - ACPR region”**

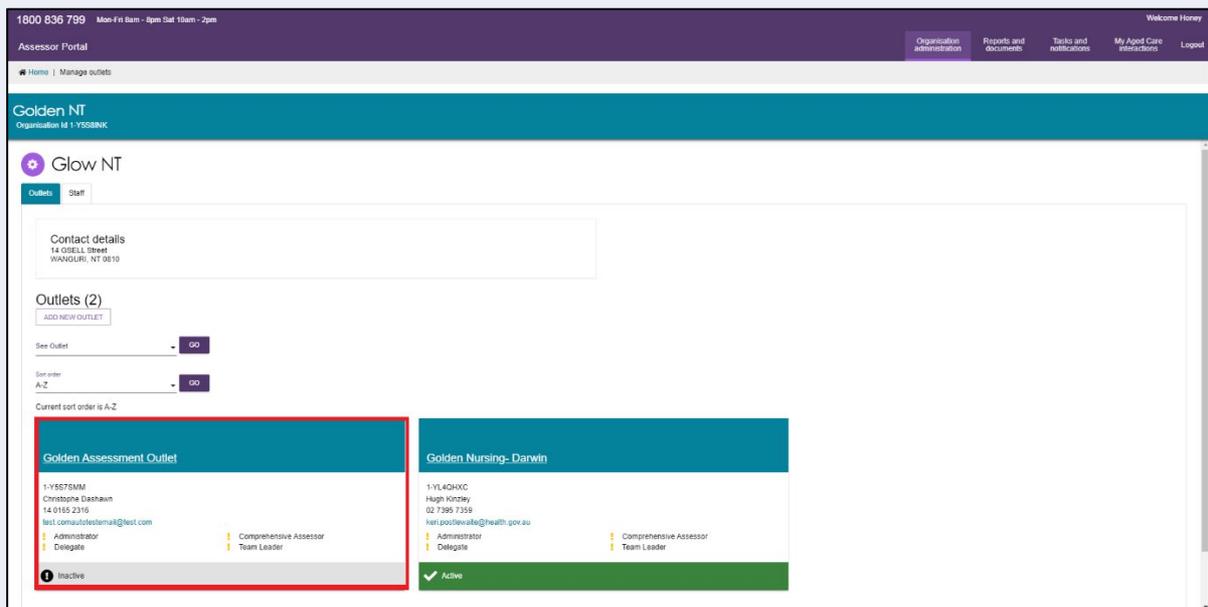
**3.2 Activating Outlets**

The steps to activate an outlet are outlined below.

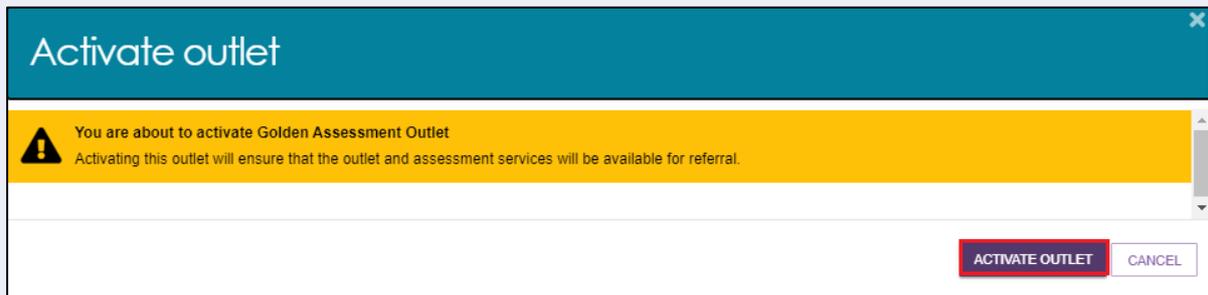
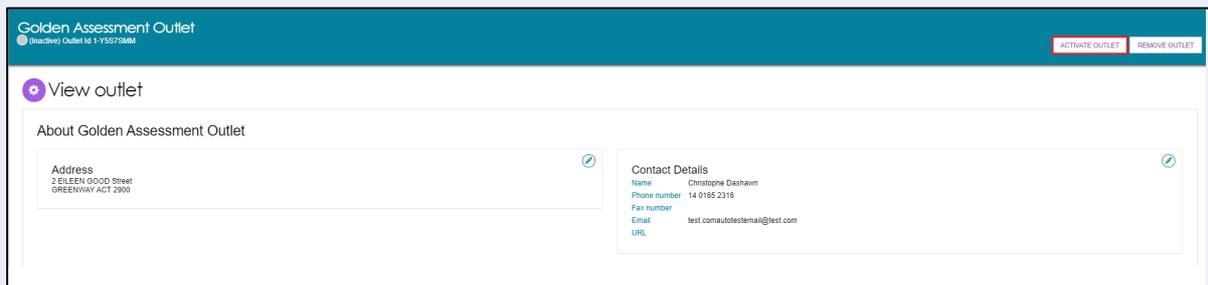
- 1. From the homepage, select **Organisation administration**.



2. You will see that your outlet is inactive. To activate an outlet, select the name of the outlet on the **Outlet card**.



3. Select **ACTIVATE OUTLET** and then again at the warning pop-up.



4. Your outlet is now active. This can be seen on the **View outlet** page, and the **Outlet administration** page. Your information will be displayed in the service finders on the My Aged Care website and contact centre staff can send referrals for assessment.

Golden NT  
Organisation Id 1-Y5S8INK

Golden NT

Outlets Staff

Contact details  
14 GSELL Street  
WANGURI, NT 0810

Outlets (2)

ADD NEW OUTLET

See Outlet GO

Sort order  
A-Z GO

Current sort order is A-Z

Golden Assessment Outlet	Golden Nursing- Darwin
1-Y5S7SMM Christophe Dashawn 14 0165 2316 test.com.autotestemail@test.com	1-YL4QHXC Hugh Kinzley 02 7395 7359 keri.postlewaite@health.gov.au
Administrator Delegate	Administrator Delegate
Comprehensive Assessor Team Leader	Comprehensive Assessor Team Leader
Active	Active

### 3.3 Staff Roles

Refer to section *Nominating An Organisation Administrator in Aged Care Systems* in the [Logging in to Aged Care Systems](#) guide for more details.

The organisation administrator will be responsible for assigning roles to other staff. This can include assigning other staff the administrator role to help set up and maintain information about your organisation in the assessor portal.

Roles should be assigned in accordance with the duties the person performs within your organisation, and with completion of all required training.

! If you are assigned more than one role, this access will apply across all outlets you have been granted access to in the assessor portal.

### 3.4 Homepage Views by Role Type

The options displayed on the assessor portal homepage vary depending on your role(s).

If you are assigned more than one role in the assessor portal, you will see the functions for all the roles you are assigned on your homepage.

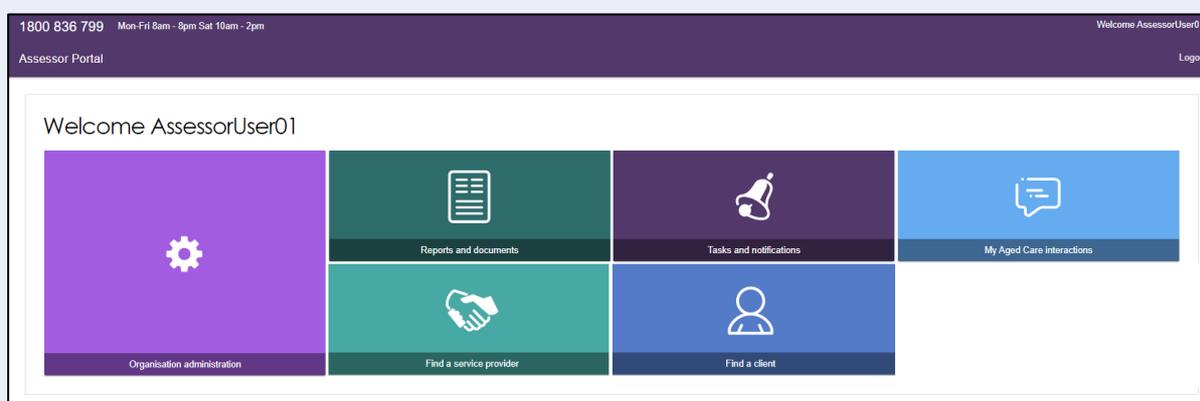
### 3.4.1 Administrator Homepage

People assigned an Administrator role at an organisation level can view and manage information for the entire organisation in the portal.

People assigned an Administrator role for one or more outlet(s) in the organisation will only be able to view and manage information for the outlet(s) they have been assigned.

If you log in to the assessor portal as an Administrator, you will see the following tiles on your homepage:

- Organisation administration
- Reports and documents
- Find a service provider (will not display for residential funding assessment organisations)
- Find a client (will not display for residential funding assessment organisations)
- Tasks and notifications
- My Aged Care interactions

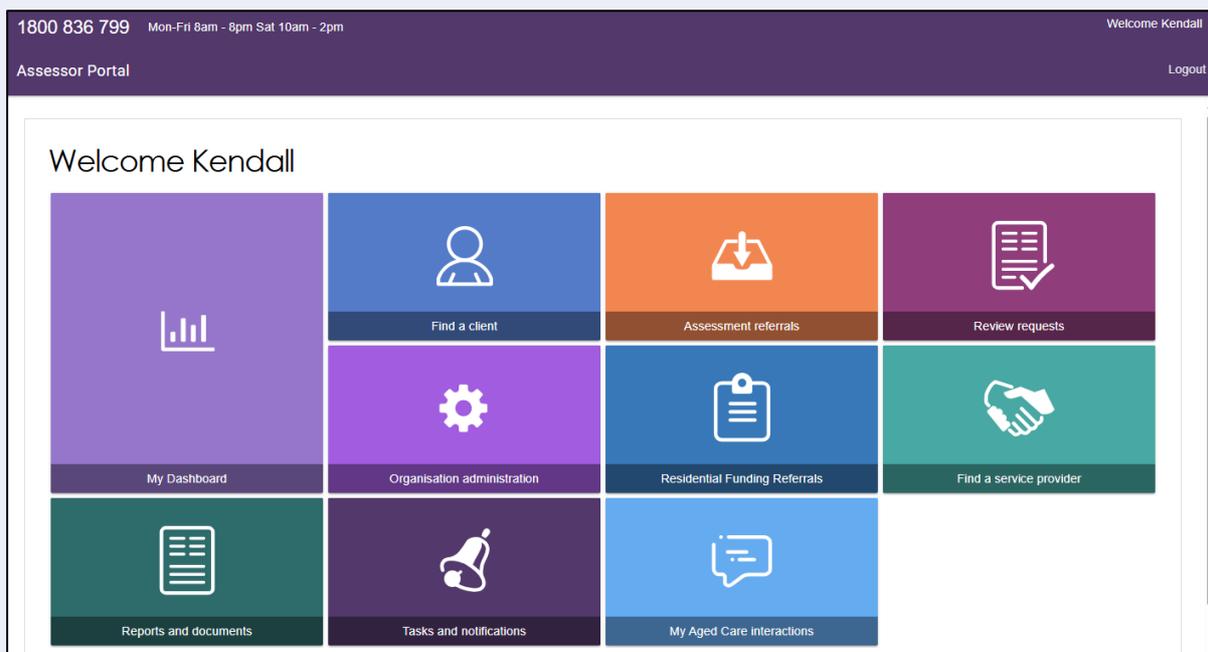


### 3.4.2 Team Leader Homepage

People assigned the Team Leader role in the assessor portal are responsible for managing referrals for assessment(s) and assigning assessment reviews.

If you log in to the assessor portal as a Team Leader, you will see the following tiles on your homepage:

- My Dashboard
- Find a client
- Assessment referrals including Residential Funding Referrals
- Review Requests
- Organisation administration
- Find a service provider
- Reports and documents
- Tasks and notifications
- My Aged Care interactions

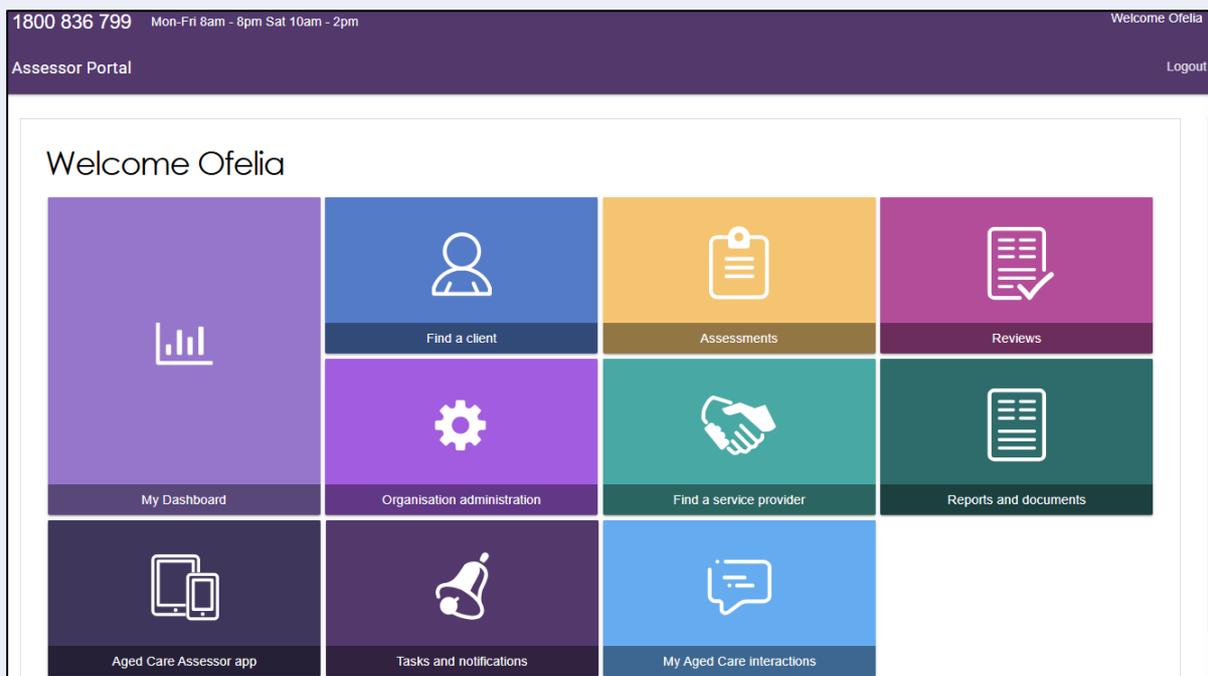


### 3.4.3 Needs assessor Homepage

People assigned a needs assessor role are responsible for registering new clients and conducting client assessments.

If you log in to the assessor portal as a needs assessor, you will see the following tiles on your homepage:

- My Dashboard
- Find a client
- Assessments
- Reviews
- Organisational administration
- Find a service provider
- Reports and documents
- Aged Care Assessor App
- Tasks and notifications
- My Aged Care interactions



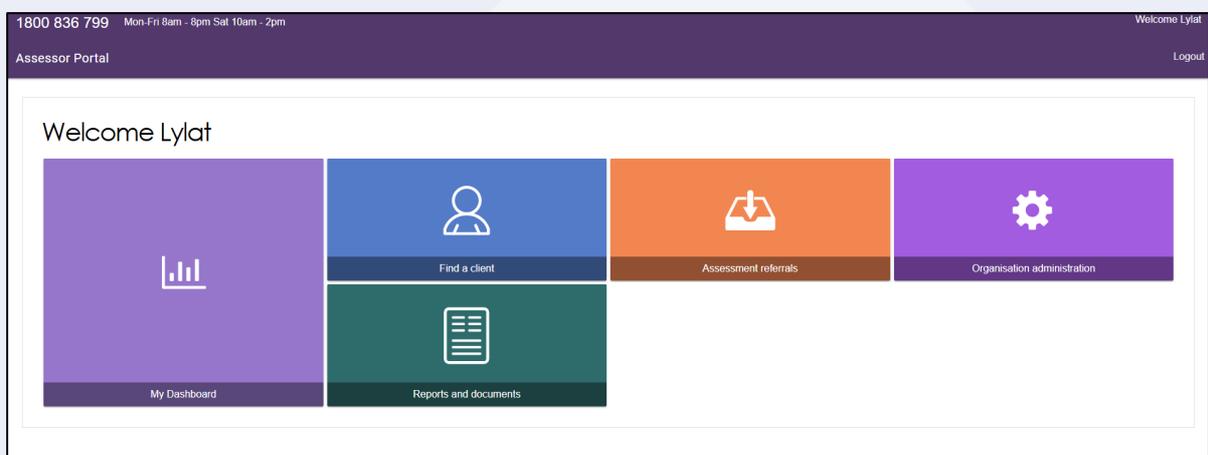
### 3.4.4 Triage Delegate Homepage

**!** Please note, delegate roles cannot be assigned by Organisation Administrators and instead require needs assessors, Team Leaders or Operational Manages to submit an application. For more information regarding the application for delegate roles please refer to [My Aged Care Assessor Portal User Guide 12 – Managing Delegate roles](#).

People assigned a Triage Delegate role in the assessor portal will be able to complete triage.

If you log into the assessor portal as a Triage Delegate you will be able to see the following tiles on your homepage:

- My Dashboard
- Find a client
- Assessment referrals
- Organisation administration
- Reports and documents



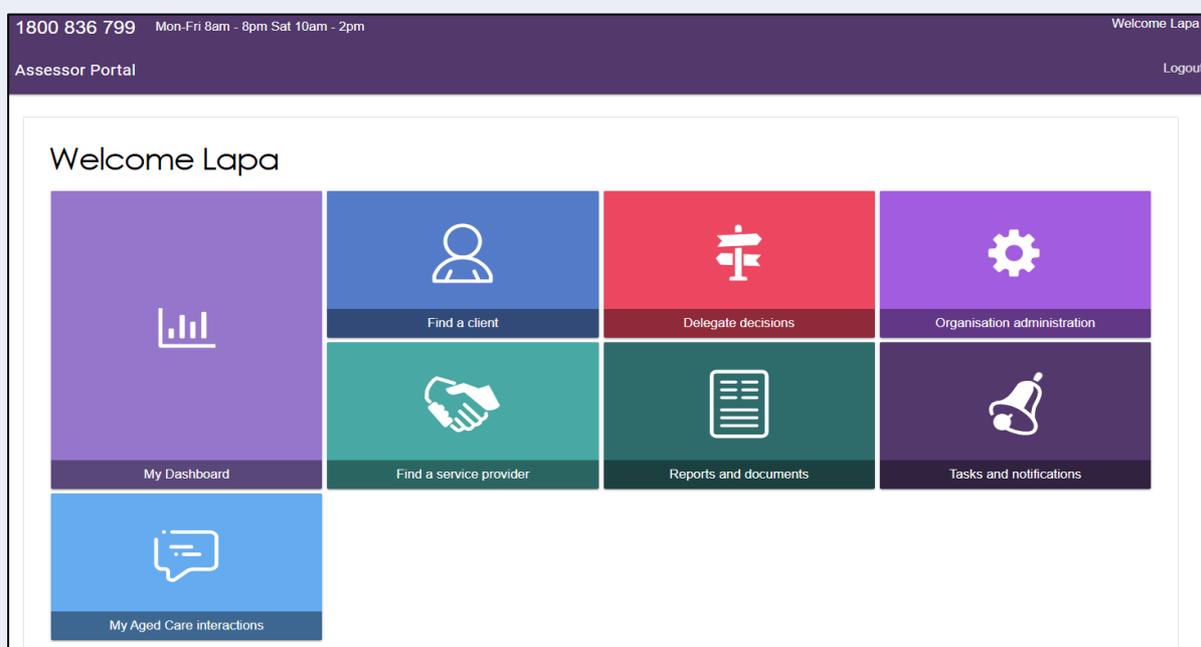
### 3.4.5 Clinical Assessment Delegate Homepage

! Please note, delegate roles cannot be assigned by organisation administrators and instead require needs assessors, Team Leaders or Operational Manages to submit an application. For more information regarding the application for delegate roles please refer to [My Aged Care Assessor Portal User Guide 12 – Managing Delegate roles](#).

People assigned a clinical assessment delegate role in the assessor portal will be able to make Delegate decisions for services requiring approval under the *Aged Care Act*.

If you log into the assessor portal as a clinical assessment delegate you will see the following tiles on your homepage:

- Delegate decisions
- Find a client
- Find a service provider
- Reports and documents
- Tasks and notifications
- Organisation administration
- My Aged Care interactions



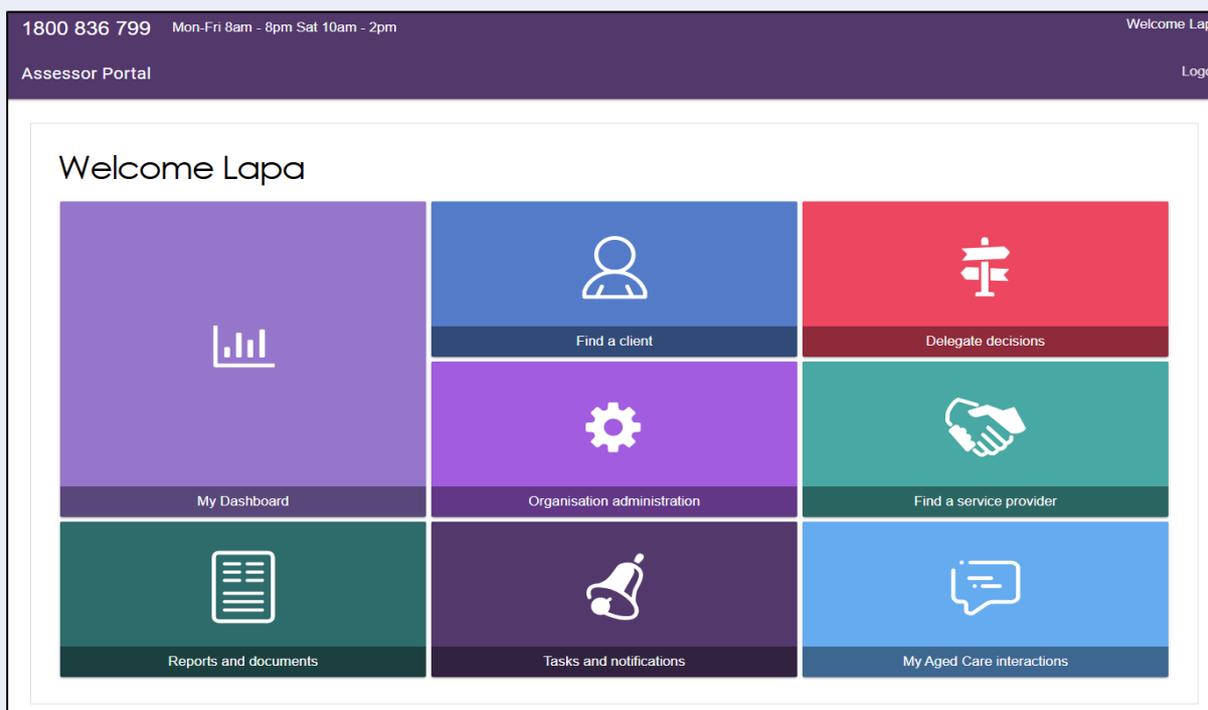
### 3.4.6 Assessment Delegate Support Homepage

People assigned the Assessment Delegate Support role in the assessor portal can support the Delegate by generating, uploading and/or printing Approval/Non-Approval Letters and Referral Code Letters. They can also print client information in support plans and client records.

If you log in to the assessor portal as an Assessment Delegate Support, you will see the following tiles in your homepage:

- Delegate decisions
- Find a client
- Organisation administration
- Find a service provider
- Reports and documents
- Tasks and notifications
- My Aged Care interactions



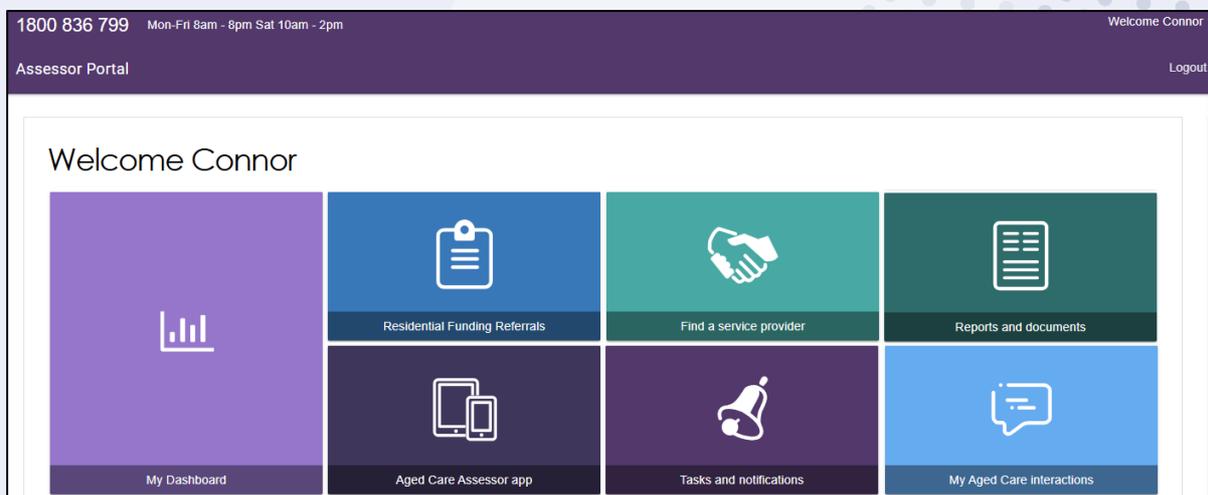


### 3.4.7 Residential Funding Assessor Functions

People assigned the *Residential Funding Assessor* role will have the below view in the My Aged Care Assessor Portal. From here, they can view the assessment referrals they have been assigned to undertake, and the assigned referrals that have been closed. They can also accept and assign referrals.

If you log in to the assessor portal as a RAC funding assessor, you will see the following tiles in your homepage:

- Find a client
- Residential Funding Referrals
- Find a service provider
- Reports and documents
- Aged Care Assessor app
- Tasks and notifications
- My Aged Care interactions

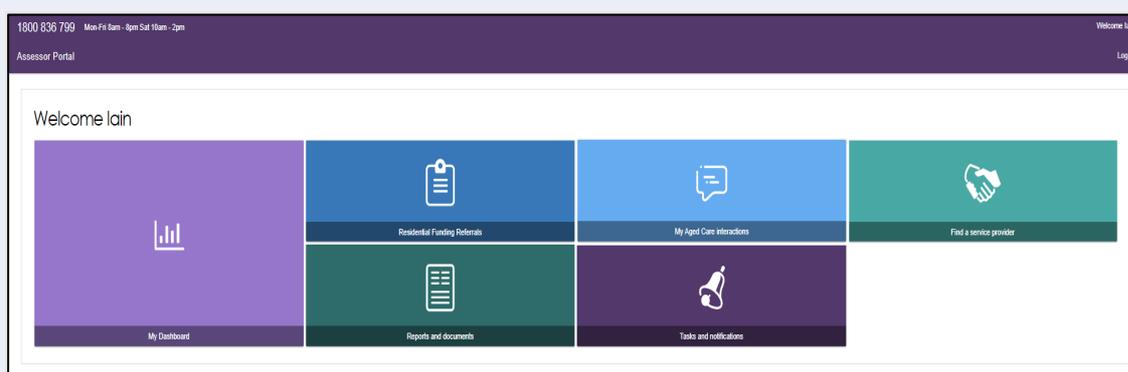


### 3.4.8 Residential Funding Team Lead Functions

Residential Funding team leads will have the following view in the My Aged Care Assessor Portal. From here team leads are able to view Residential Funding Referrals, generate reports and documents, find service providers and conduct other functions in their role.

If you log in to the assessor portal as a RAC funding assessor, you will see the following tiles in your homepage:

- Residential Funding Referrals
- My Aged Care interactions
- Find a service provider
- Reports and documents
- Tasks and notifications



## 4 Key Functions By Role Type

Administrators will create and maintain staff accounts in the assessor portal.

Staff can be allocated more than one role (Administrator, Team Leader, Needs assessor, Residential Funding Assessors, Residential Funding Assessor (Restricted), Triage Delegate, Clinical Assessment Delegate and Assessment Delegate Support) at the same time in the assessor portal.

The table below outlines the key functions for roles within the assessor portal, as well as the roles that others, such as the contact centre, play in the client's aged care journey. It includes both client focussed, and organisation focussed tasks.

### Client Focussed Roles and Functions

Key Functions	Contact Centre	Administrator	Team Leader	Triage Delegate	Needs Assessor	RAC Funding Assessor	Clinical Assessment Delegate	Assessment Delegate Support
View reports and documents		✓	✓	✓	✓	✓		
Manage staff accounts		✓						
Activate Aged Care					✓	✓		

Key Functions	Contact Centre	Administrator	Team Leader	Triage Delegate	Needs Assessor	RAC Funding Assessor	Clinical Assessment Delegate	Assessment Delegate Support
Assessor app								
Provision of aged care information	✓	✓	✓	✓	✓	✓	✓	✓
Register a client or support person	✓				✓ (excluding Residential funding assessors)			
Self-Refer a client					✓ (limited)			
Search for and view a client record			✓	✓	✓		✓	✓
Screening	✓				✓*			
Complete triage				✓	✓**			
Referral for assessment	✓				✓			
Conduct assessment					✓			
Enter assessment information on the client record (including completing the support plan)					✓		✓	
Service matching and referrals	✓				✓			
Management of assigned Residential referrals			✓ (Residential Funding Assessor Team Leads only)					
Action referral & deliver services								



Key Functions	Contact Centre	Administrator	Team Leader	Triage Delegate	Needs Assessor	RAC Funding Assessor	Clinical Assessment Delegate	Assessment Delegate Support
Accept and reject assessment referrals			✓					
View tasks and notifications		✓	✓	✓	✓	✓	✓	✓
Manage task and notification preferences		✓						
View and Reassign HCP notifications			✓					
Record completed tasks in the portal			✓		✓			
Approve Delegate decisions							✓	
Print client information for the Delegate							✓	✓
Assign & transfer support plan reviews			✓		✓			
Conduct Support Plan Reviews					✓			

*\*A needs assessor who self refers will complete the screening component.*

*\*\*A needs assessor can complete Triage if supervised by a Triage Delegate.*

## Organisation Focussed Roles and Functions

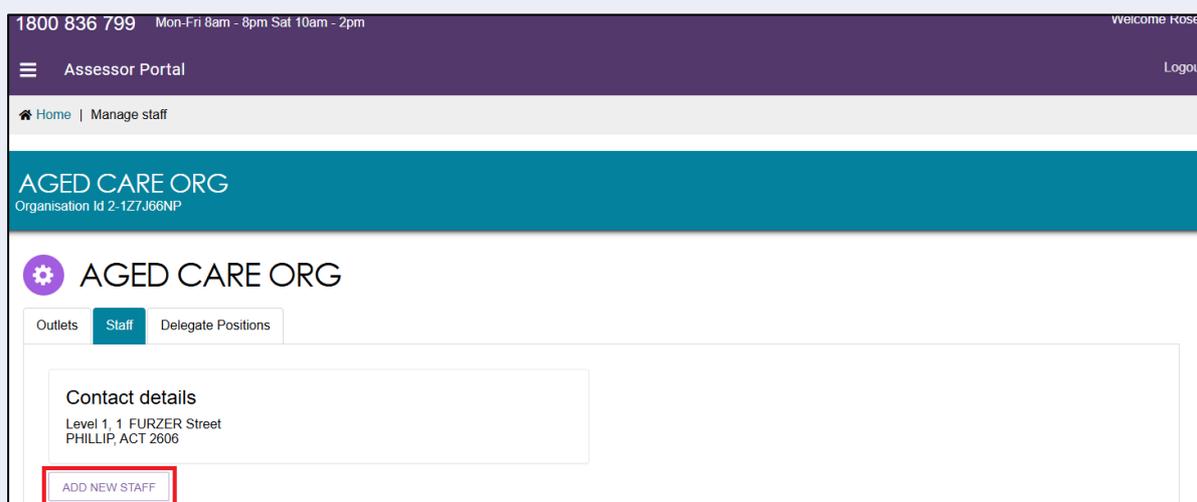
Key Functions	Administrator Role	Team Leader Role	Needs assessor Role	Triage Delegate	Clinical Assessment Delegate Role	Assessment Delegate Support Role	RAC funding assessor
View My Aged Care interactions	✓	✓	✓	✓	✓	✓	✓
Request a change to contractual information	✓						
Manage staff accounts: add, edit, deactivate and remove	✓						

### 4.1 Creating New Staff Accounts and Assigning Roles

The first time each staff member logs into the assessor portal, they will need to follow the steps outlined in [Logging in to the Aged Care Systems](#) on the Departments website.

The steps to create a new staff account are outlined below.

1. From the **Staff** tab in the Organisation administration page, select **ADD NEW STAFF**.



2. Enter staff details (First name, last name, unique email address and a contact number).

Select whether they are accredited, then assign role(s) to staff under the Manage Roles section. Refer to the next step for managing roles.



**Add staff member**

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

Title \_\_\_\_\_ Job title \_\_\_\_\_

First name \* \_\_\_\_\_ Email \* \_\_\_\_\_

Last name \* \_\_\_\_\_ Contact numbers  
Only one contact number is required \* \_\_\_\_\_

Preferred name \_\_\_\_\_ Home (?) \_\_\_\_\_

Clinical status \_\_\_\_\_ Work (?) \_\_\_\_\_

Mobile (?) \_\_\_\_\_

MAclearing certificate

**Accreditation** (?)  
Accredited \*  
 Yes  
 No

**Occupation** (?)  
Occupation \_\_\_\_\_

Please enter details below: \_\_\_\_\_

**Manage roles \*** (?)  
ASSIGN ROLES

**Manage Qualifications** (?)  
ADD QUALIFICATIONS

SAVE CANCEL

- To Manage Roles, select the role you wish to assign to that staff member and then click **SAVE**

**Manage roles**

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

Please select the role(s) \*

Administrator  Team Leader

Delegate Support  Comprehensive Assessor

Home Support Assessor

Add, Cease or Replace Delegate Roles through [Delegate Positions](#)

Clinical Assessment Delegate (?)

Triage Delegate (?)

Non-Clinical Assessment Delegate (?)

SAVE CANCEL

**!** Delegate roles cannot be assigned by organisation administrators and instead require needs assessors, Team Leaders or Operational Manages to submit an application. For more information regarding the application for delegate roles please refer to [My Aged Care Assessor Portal User Guide 12 – Managing Delegate roles](#).



- ! • Either the **Residential Funding Assessor** or **Residential Funding Assessor (Restricted)** role can be selected for each staff. That is, they cannot be assigned both roles.
- A **Residential Funding Assessor** or **Residential Funding Assessor (Restricted)** can also be a **Residential Funding Team Lead**.
- As per the Statement of Requirements for the Single Assessment System workforce, if the assigned role is **Residential Funding Assessor, Residential Funding Assessor (Restricted), clinical needs assessor (Comprehensive Assessor) or Team Leaders** the Australian Health Practitioner Regulation Agency (AHPRA) ID and the Discipline of the assessor *needs* to be recorded at the Accreditation section of the **Add Staff Member** page.

**Accreditation** ?

Accredited \*

Yes

No

Learning management system ID

Expiry date  
(e.g. dd/mm/yyyy)

Staff member has completed the appropriate accreditation and other training requirements as part of their contractual obligations and as directed by the Department and relevant to their roles and responsibilities. Comprehensive Assessors must hold current unrestricted registration with the Australian Health Practitioners Regulation Agency (AHPRA) or other relevant professional association, for example social workers must be registered by the Australian Association of Social Workers.

To assign an Administrator role at the organisation level, select **Organisation Level** button, then **SAVE ROLES**. Any staff roles that are assigned at this level are automatically replicated across all outlets.

**Manage role - Administrator**

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

Please select the level of the Administrator role\*

Organisation level  Outlet level

BACK SAVE ROLES CANCEL

If you wish to limit an employee role to one or more outlets, select the **Outlet Level** option instead, then **SAVE ROLES**.

## Manage role - Administrator

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

Please select the level of the Administrator role\*

Organisation level  Outlet level

Please select outlets for Administrator role \*

Select all outlets

Access Care Network Australia - Goldfields WA

Access Care Network Australia - Kimberley WA

Access Care Network Australia - Metropolitan East WA

Access Care Network Australia - Metropolitan North

Access Care Network Australia - Great Southern WA

Access Care Network Australia - Metropolitan East SA

Access Care Network Australia - Metropolitan North SA

Access Care Network Australia - Metropolitan South

4. A green banner appears when the role/s are saved successfully. It will display under the Manage Roles section, along with any assigned outlets. Select **SAVE** to continue.

## Manage roles \* ?

Assigned roles ?	Assigned outlets
Administrator	Aussie Aged Care  

 Role(s) saved successfully.

5. The new Administrator is now displayed under the Staff section of your organisation. The Staff Card contains the accreditation status and the role/s.

## AGED CARE ORG LTD

Outlets **Staff** Delegate Positions

Contact details  
Level 1, 16 FURZER Street  
PHILLIP, ACT 2606

Staff (18)

Filter by

Sort order  
A-Z

Current sort order is A-Z

**America FERDINAND**

Staff member ID: BL\_GB505560  
Work: 02 7412 7412  
Email: america.ferdinand@uattest.au  
Non-accredited  
Roles  
◦ Administrator

 Active

**Andy FLOWER**

Staff member ID: BL\_XF196942  
Home: 02 7412 8523  
Email: andyflower@uattest.au  
Accredited  
Clinical Status: Clinical  
Roles  
◦ Comprehensive Assessor

 Active

**Simon FLOWER**

Staff member ID: BL\_XF460739  
Home: 02 6145 8596  
Email: simonflower@testuat.au  
Non-accredited  
Clinical Status: Non-Clinical  
Roles  
◦ Team Leader  
◦ Triage Delegate

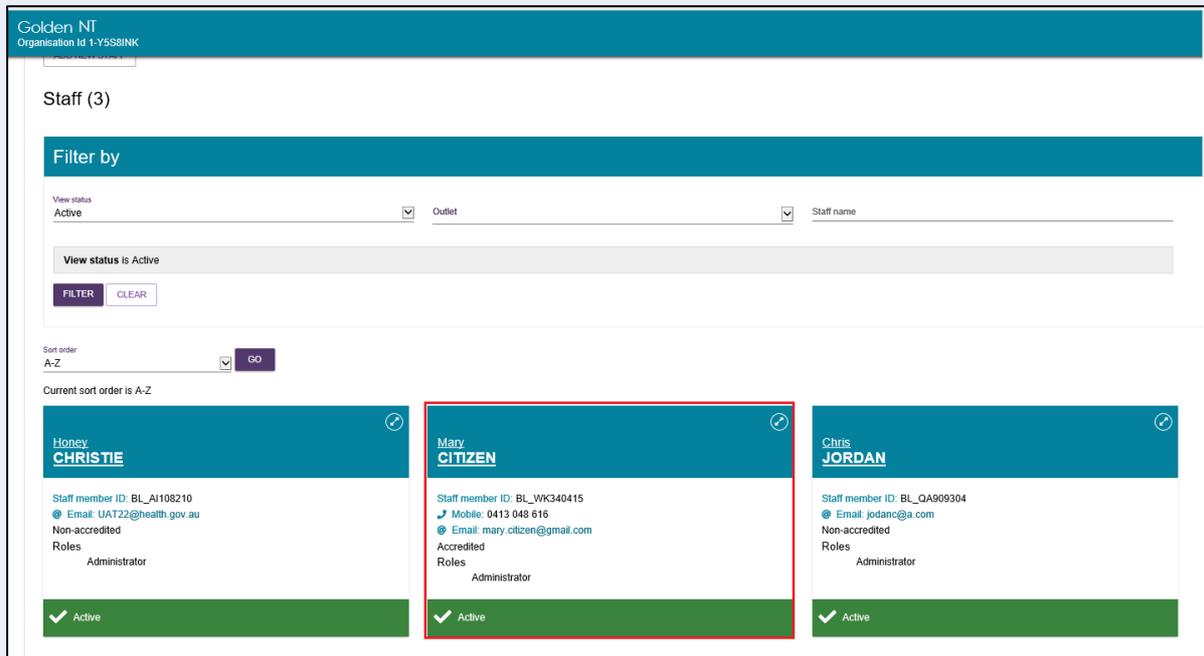
 Active



## 4.2 Deactivate a Staff Account

The steps to deactivate a staff account are outlined below.

1. From the **Staff** tab on the **Organisation administration** page, select the name of the staff member on the **Staff card** that you want to deactivate.



Golden NT  
Organisation Id 1-Y5S8INK

Staff (3)

Filter by

View status: Active (dropdown), Outlet (dropdown), Staff name (text input)

View status is Active

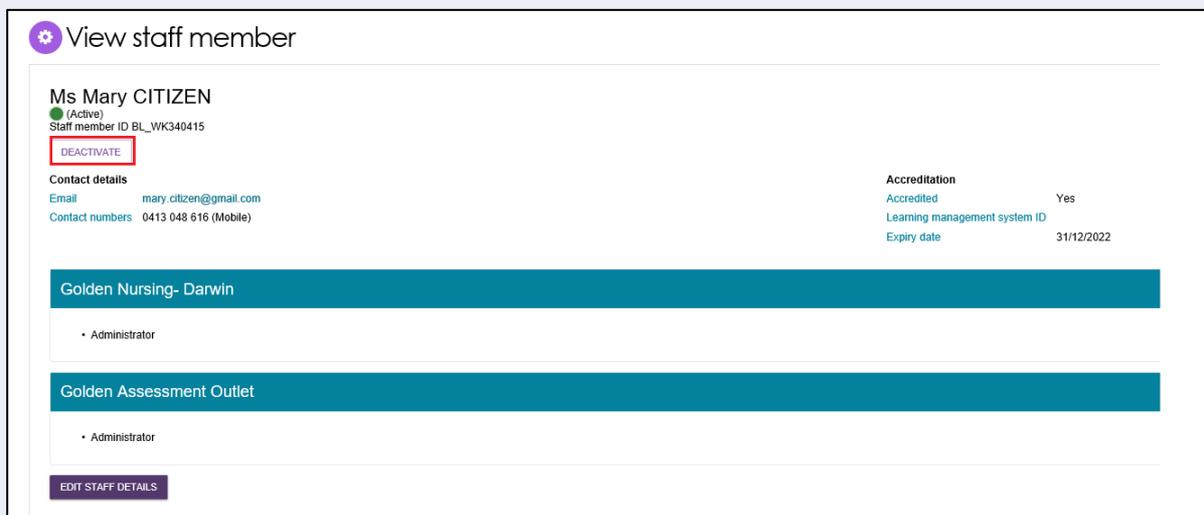
FILTER CLEAR

Sort order: A-Z (dropdown), GO

Current sort order is A-Z

Staff Member	Staff member ID	Contact Information	Roles	Status
Honey CHRISTIE	BL_AI108210	Email: UAT22@health.gov.au	Administrator	Active
Mary CITIZEN	BL_WK340415	Mobile: 0413 048 616 Email: mary.citizen@gmail.com	Administrator	Active
Chris JORDAN	BL_QA909304	Email: jodanc@a.com	Administrator	Active

2. From the **View staff member** page, select **DEACTIVATE**.



View staff member

Ms Mary CITIZEN  
(Active)  
Staff member ID BL\_WK340415

DEACTIVATE

Contact details  
Email: mary.citizen@gmail.com  
Contact numbers: 0413 048 616 (Mobile)

Accreditation  
Accredited: Yes  
Learning management system ID  
Expiry date: 31/12/2022

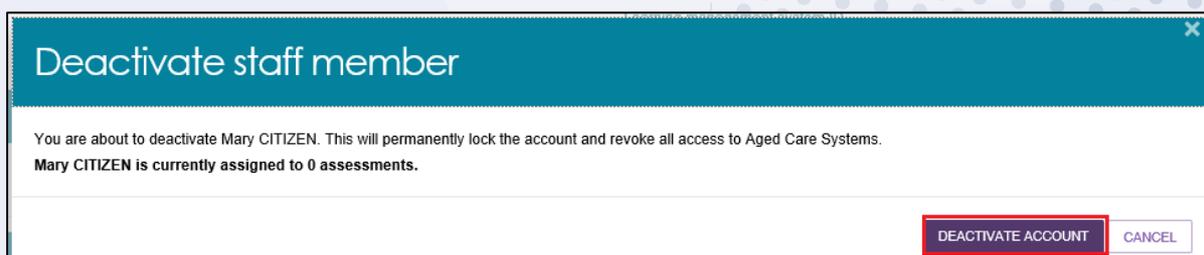
Golden Nursing- Darwin  
• Administrator

Golden Assessment Outlet  
• Administrator

EDIT STAFF DETAILS

3. Select **DEACTIVATE ACCOUNT** to confirm.

If the assessor you'd like to deactivate has any assigned assessments assigned, these will be shown to you in the confirmation pop up.



Deactivate staff member

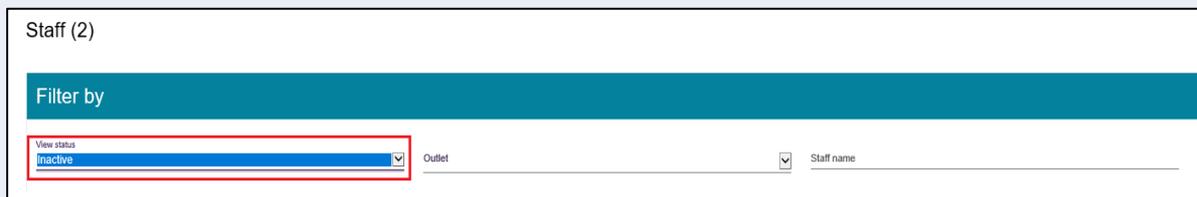
You are about to deactivate Mary CITIZEN. This will permanently lock the account and revoke all access to Aged Care Systems.  
Mary CITIZEN is currently assigned to 0 assessments.

DEACTIVATE ACCOUNT CANCEL

## 4.3 Removing and reactivating a Staff Account

Inactive staff (that have previously been deactivated) can be removed from organisations and outlets and will no longer display in the assessor portal.

1. From the **Staff** tab of the **Organisation administration** page, select **Inactive** from the **View Status** drop down menu to view inactive staff.



Staff (2)

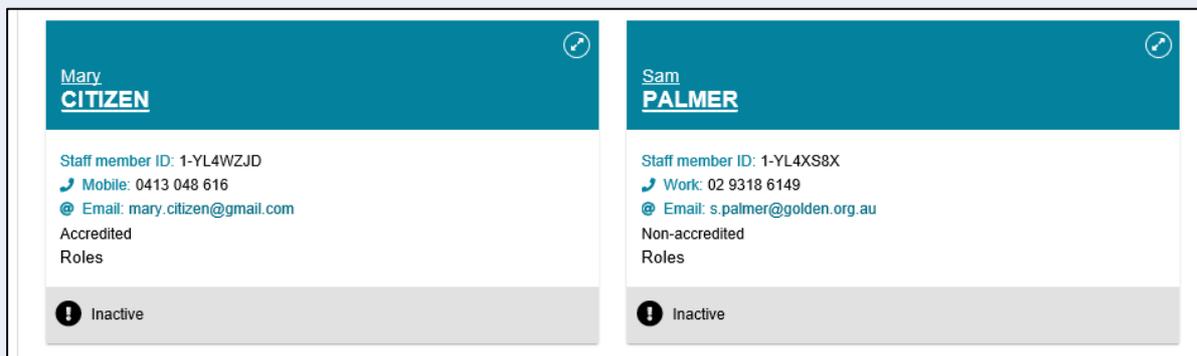
Filter by

View status  
Inactive

Outlet

Staff name

2. Select the name of the staff member on the **Staff card** that you wish to remove.



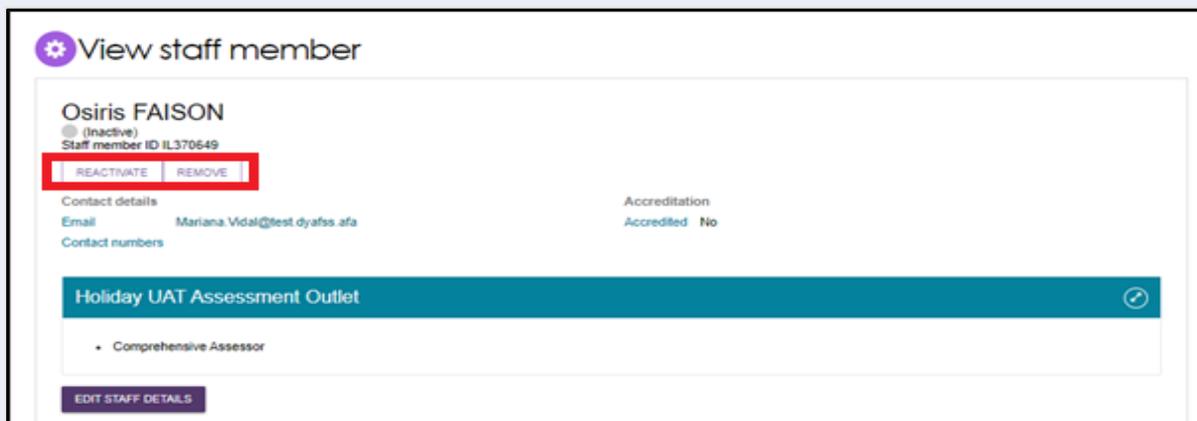
Mary  
**CITIZEN**

Staff member ID: 1-YL4WZJD  
Mobile: 0413 048 616  
Email: mary.citizen@gmail.com  
Accredited  
Roles  
Inactive

Sam  
**PALMER**

Staff member ID: 1-YL4XS8X  
Work: 02 9318 6149  
Email: s.palmer@golden.org.au  
Non-accredited  
Roles  
Inactive

3. From the **View staff member** page, select **REMOVE** or **REACTIVATE**.



View staff member

Osiris FAISON  
(Inactive)  
Staff member ID IL370649

REACTIVATE REMOVE

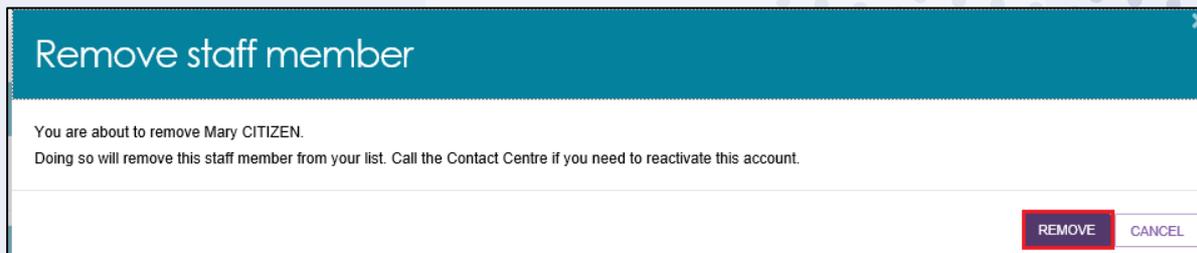
Contact details  
Email: Mariana.Vidal@test.dyafss.afa  
Contact numbers

Accreditation  
Accredited No

Holiday UAT Assessment Outlet  
Comprehensive Assessor

EDIT STAFF DETAILS

4. Select **REMOVE** to remove the staff member from your staff list.



Remove staff member

You are about to remove Mary CITIZEN.  
Doing so will remove this staff member from your list. Call the Contact Centre if you need to reactivate this account.

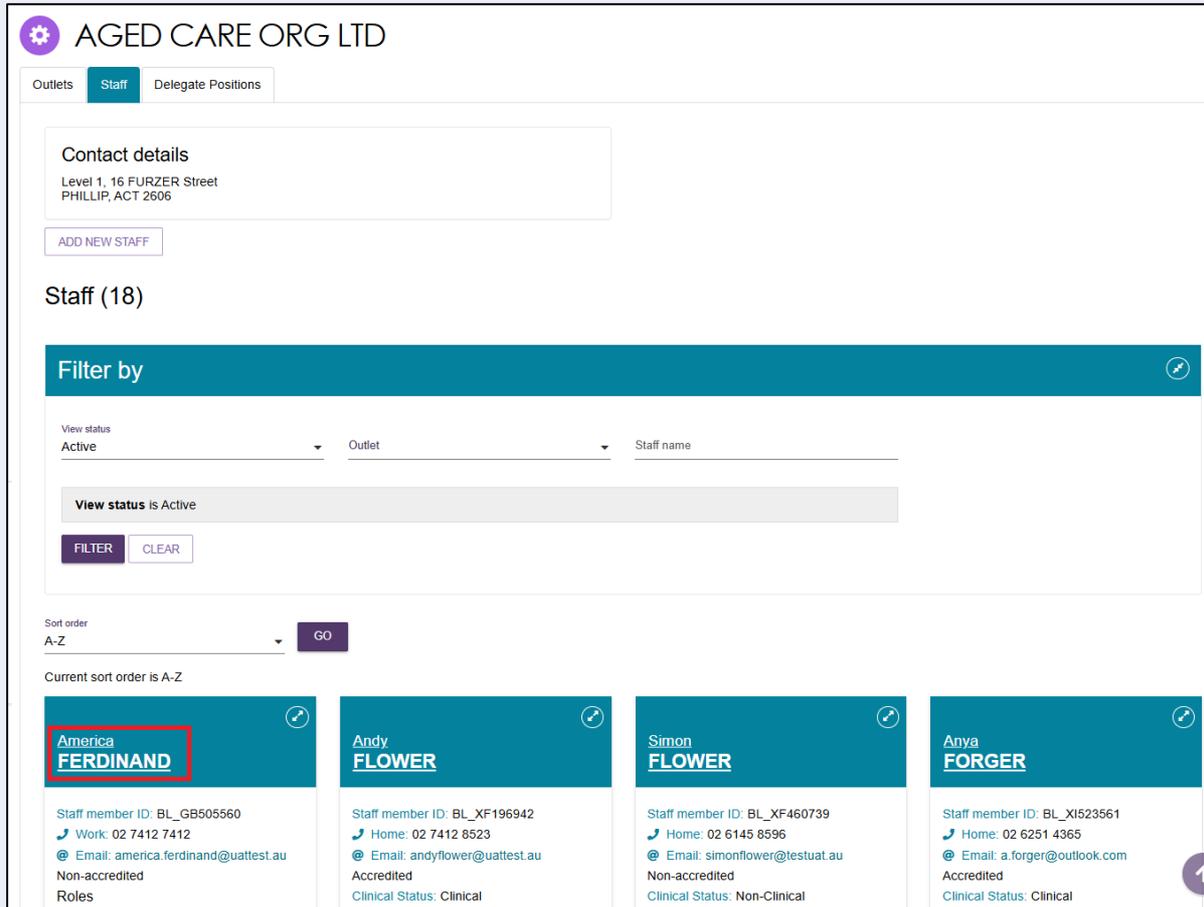
REMOVE CANCEL

**!** If you need to restore access for a staff member who has been removed, call the Helpline. You cannot re-create a portal user account using the same email address.

## 4.4 Edit a Staff Account

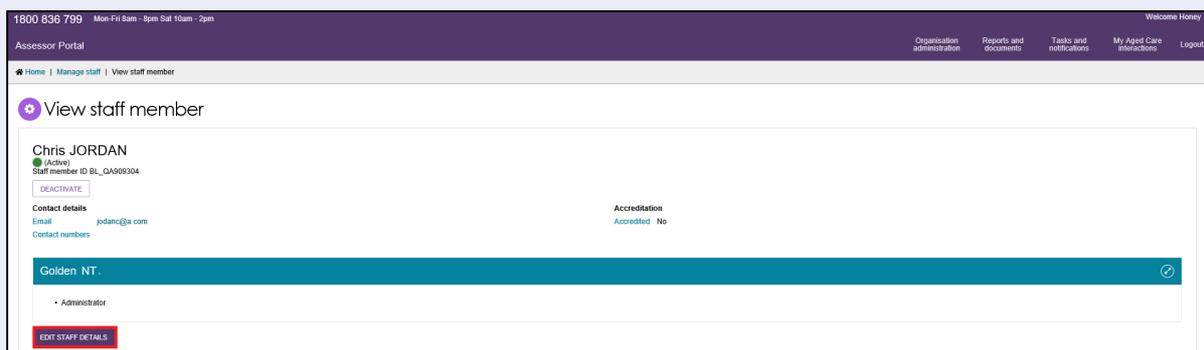
The steps to edit a staff account are outlined below.

1. From the **Staff** tab of the **Organisation administration** page, select the name of the staff member on the **Staff card** that you want to edit.



The screenshot shows the 'AGED CARE ORG LTD' interface. At the top, there are tabs for 'Outlets', 'Staff', and 'Delegate Positions'. Below this is a 'Contact details' section with the address: 'Level 1, 16 FURZER Street PHILLIP, ACT 2606'. There is an 'ADD NEW STAFF' button. The main section is titled 'Staff (18)'. Below this is a 'Filter by' section with dropdown menus for 'View status' (set to 'Active'), 'Outlet', and 'Staff name'. There is a 'View status is Active' filter applied. Below the filters are 'FILTER' and 'CLEAR' buttons. At the bottom, there is a 'Sort order' dropdown set to 'A-Z' and a 'GO' button. Below the sort order, it says 'Current sort order is A-Z'. The staff list consists of four cards: 'America FERDINAND', 'Andy FLOWER', 'Simon FLOWER', and 'Anya FORGER'. Each card displays the staff member's name, ID, work/home phone numbers, email, accreditation status, and clinical status. The 'America FERDINAND' card is highlighted with a red box.

2. From the **View staff member** page, select **EDIT STAFF DETAILS**.



The screenshot shows the 'View staff member' page for Chris JORDAN. At the top, there is a header with the phone number '1800 836 799' and the time 'Mon-Fri 8am - 8pm Sat 10am - 2pm'. Below this is the 'Assessor Portal' navigation bar with links for 'Organisation administration', 'Reports and documents', 'Tasks and notifications', 'My Aged Care interactions', and 'Logout'. The main content area shows 'View staff member' with a gear icon. Below this is the staff member's name 'Chris JORDAN', status '(Active)', and 'Staff member ID: BL\_OA909304'. There is a 'DEACTIVATE' button. Below this are 'Contact details' including 'Email: jrdanc@sa.com' and 'Contact numbers'. To the right, there is an 'Accreditation' section showing 'Accredited: No'. Below this is a 'Golden NT' section with a gear icon and a list of roles: 'Administrator'. At the bottom, there is a red 'EDIT STAFF DETAILS' button.

3. Staff details and roles can be updated at any time. To edit roles, select **Manage Roles** or the Edit (pencil) icon, and revise staff roles in the pop up/s that appear, then select **Save**.

### Add staff member

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

Title \_\_\_\_\_ Job title \_\_\_\_\_

First name \* \_\_\_\_\_ Email \* \_\_\_\_\_

Last name \* \_\_\_\_\_ Contact numbers  
Only one contact number is required. \*

### Edit staff member

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

Title \_\_\_\_\_ Job title \_\_\_\_\_

First name \* **Andy** Email \* **andyflower@uattest.au**

Last name \* **Flower** Contact numbers  
Only one contact number is required. \*

Home (🔗) **0274128523**

Preferred name \_\_\_\_\_

Clinical status **Clinical** Work (🔗) \_\_\_\_\_

Mobile (🔗) \_\_\_\_\_

**Accreditation** (🔗)  
Accredited \*  
 Yes  
 No  
 MAClearing certificate

**Occupation** (🔗)  
Occupation \_\_\_\_\_

Please enter details below: \_\_\_\_\_

**Manage roles** \* (🔗) MANAGE ROLES

Assigned roles (🔗)	Assigned outlets
Comprehensive Assessor	GRAZIER AGED CARE Outlet ACAT-RAS <span style="float: right;">🔗 📄</span>

**Manage Qualifications** (🔗)  
ADD QUALIFICATIONS

SAVE CANCEL

## 4.5 Find A Service Provider

Needs assessors, Team Leaders, Triage Delegates, Clinical Assessment Delegates and Assessment Delegate Support roles have access to the **Find A Service Provider** function in the assessor portal.

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

Assessor Portal Logo

Welcome Melina

 My Dashboard	 Find a client	 Assessments	 Reviews
 Find a service provider	 Delegate decisions	 Organisation administration	 Residential Funding Referrals
 My Aged Care Interactions	 Reports and documents	 Aged Care Assessor app	 Tasks and notifications



Users can search for providers by entering the category, service type, location and diverse needs.

The screenshot shows the 'Assessor Portal' search interface. At the top, there is a navigation bar with 'Assessor Portal' and a 'Logout' link. Below the navigation bar, there is a breadcrumb trail: 'Home | Find a Service Provider'. The main heading is 'Find a service provider'. A note states: 'All fields marked with an asterisk (\*) are required.' The search form is divided into three sections:

- Locate these services:** This section contains two dropdown menus: 'Select a category \*' and 'Select a service type \*'.
- Using this location or service provider name:\*** This section has two radio button options: 'Enter a suburb/postcode' and 'Enter a service provider name'.
- Preferred language chosen:** This section has a text input field for 'Preferred client language' and a plus sign icon to the right.

At the bottom left of the form, there is a purple 'SEARCH' button.

The results will then display below your search. Under each service providers service card, there is information such as the providers suburb, phone number, whether they are services available and whether there are waitlists available. A link to the [My Aged Care website](#) is also listed which is where additional information such as the provider's star rating and compliance information can be found.

The screenshot displays search results for '8 providers matched criteria'. The results are presented in a grid of service cards. Each card includes the provider's name, location, phone number, and status for service availability and waitlist availability. A link to 'Regulatory decisions are available here' is provided for each provider.

Provider Name	Location	Phone Number	Service available	Waitlist available
Anglicare Southern Queensland Brisbane North	STAFFORD	02 4024 3857	Yes	No
BlueCare Metro North Allied Health	MORAYFIELD	02 9275 0653	Yes	No
Centacare Enoggera	ENOGGERA	02 3197 0857	No	No
Community - Aged Care Services	PADDINGTON	02 9703 8474	No	No
Ozcare - Brisbane North	CHERMSIDE	02 5806 7257	Yes	No
RSL Care Brisbane North - Bolton Clarke	MILTON	02 7183 9401	No	No

Expand the service card to view more information about the service provider. Click on View Details for additional information.

### Information details for Anglicare Southern Queensland Brisbane North ✕ CLOSE

#### Anglicare Southern Queensland Brisbane North

✓ Commonwealth Government recognised organisation

For over 150 years, Anglicare Southern Queensland has been proud to provide the support you need to live the life you want. Services include: Physiotherapy Tailored programs to regain your movement and physical independence, including hydrotherapy, Podiatry Prevention, diagnosis, treatment and improvement of various lower limb conditions. Dietician/Nutritionist Assessment and development of individual nutritional needs as well as identification of food intolerances or allergies. Occupational Therapy Advice on doing daily activities in a way that improves your personal safety, independence and quality of life. Social Work Collaboration focussed on wellbeing, empowering you to live on your own terms at home and in the community. Speech Pathology Strategies to improve speech related issues due to aging, stroke, dementia or head injury. Divisional Therapy Creating opportunities so that you may choose to participate in leisure, recreation and play activities.

Regulatory decisions are available here [↗](#)

#### Service type

Allied Health and Therapy Services

- Available
- No Waitlist

#### Service Sub-types provided

	Sub-type availability	Waitlist availability
🔍 Dietitian or Nutritionist	● Available	● Not available
🔍 Social Work	● Available	● Not available

#### Contact information

0 2 Babarra Street  
STAFFORD  
QLD, 4053

📞 Phone: 02 4024 3857  
✉ Email: Moira.Weeks@test.kaciss.smr  
🌐 Website: <https://anglicaresq.org.au>

#### Specialisations

Specialised services [?](#)

- Dementia

Languages [?](#)

• Arabic	• Cantonese	• Chinese
• Croatian	• English	• Greek
• Italian	• Mandarin	• Polish
• Spanish	• Vietnamese	

## 4.6 End of Month (EOM) Reporting

Organisation Administrators and Team Leaders for assessment organisations have the option to send the Department a copy of their BIP EOM Preparation Invoice Report at the end of each month as a supporting document to their EOM Assessment invoice. To do this:

1. Select the **Reports and document** tile from the assessor portal homepage.

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

Assessor Portal Logout

### Welcome Gino



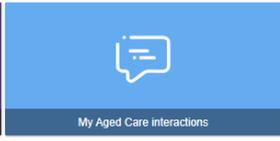
Organisation administration



Reports and documents



Tasks and notifications



My Aged Care Interactions

2. Click on the **BIP EOM Preparation Invoice Report**



Assessor Portal

Organisation administration | Reports and documents | Tasks and notifications | My Aged Care interactions | Logout

Home | Reports and documents

## Reports and documents

Reports | Forms | Links

### My Reports

Name	Requested Date	Status
No Records found		

### Reports List

Name	Description	Formats
BIP ACG Assessment Management Report		XLSX, PDF
BIP Assessment - Work In Progress Report		PDF
BIP EOM Invoice Report		XLSX
<b>BIP EOM Preparation Invoice Report</b>		PDF, XLSX

BUSINESS INTELLIGENCE REPORTS

- The Generate report page will display. Select the correct Outlet ID and enter the start and end date for the month you are reporting on. Next, select **XLSX** from the drop-down menu under Output Type. Then select **REQUEST REPORT**.

## Generate report

Reports | Forms | Links

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

### BIP EOM Preparation Invoice Report

Outlet ID: *	Start Date: *
UAT ACAS	01/08/2024
End Date: *	
31/08/2024	

Output Type: \*

XLSX

**REQUEST REPORT** CANCEL

- You will then be re-directed back to the **Reports and documents** page where the BIP EOM Preparation Invoice Report will now display under **My Reports**. Select **View** to open the report.

Please note, the status of the report will display as *Processing* initially but will change to *Ready – View* once the report has been generated.

## Reports and documents

Reports | Forms | Links

### My Reports

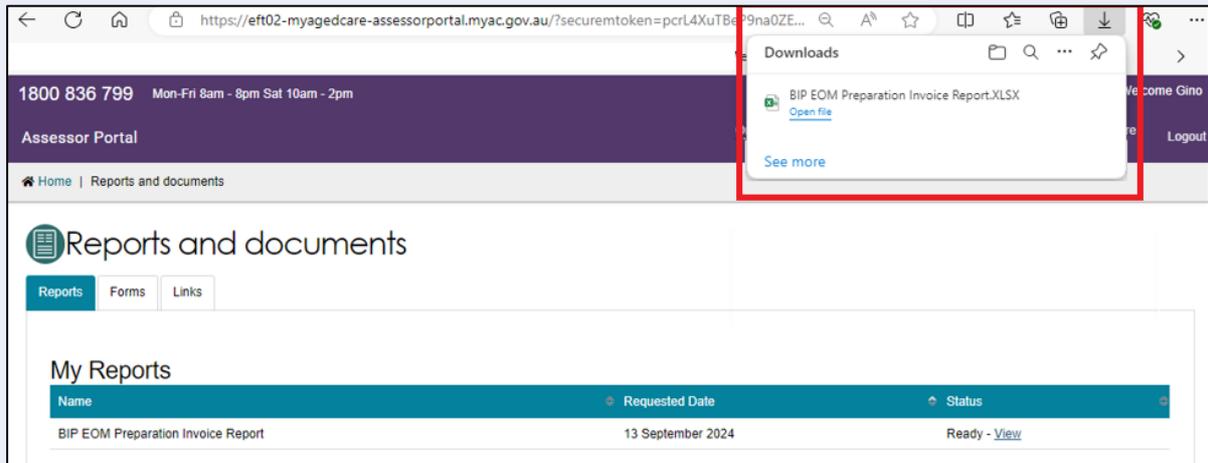
Name	Requested Date	Status
BIP EOM Preparation Invoice Report	13 September 2024	Ready - <a href="#">View</a>

### Reports List

Name	Description	Formats
BIP ACG Assessment Management Report		XLSX, PDF
BIP Assessment - Work In Progress Report		PDF
BIP EOM Invoice Report		XLSX



- The report will then download to your computer as an excel file. Click **Open file** link from the Downloads pop up box top right of your web browser page.



- The report will then display in Excel.

The report will show the total number of assessments, along with information relating to each individual assessments including:

- The unique assessment ID (Event ID column)
- Who completed the assessment
- The unique client ID (to help preserve a level of privacy)
- Date the assessment was completed
- The assessment type at the triage stage
- If the assessment was complete in-hospital

Event ID	Assessor	Client ID	Date assessment	Triage Assessment	Service Item	NAPS Service	In-Hospital
2-1ZHUT7S7	UAT.Ford UAT.Lovell	AC56749609	#####	Comprehensive Assessment	Heidelberg ACAS	23125	N

For more information regarding reporting, please refer to the [My Aged Care Assessment Manual](#).

