



# Assessor Portal User Guide 1 - Registering and referring clients for assessment

This user guide is to assist aged care needs assessors (assessors) in using the My Aged Care assessor portal (assessor portal) or the Aged Care Assessor App (the App) to register clients and refer them for assessment.

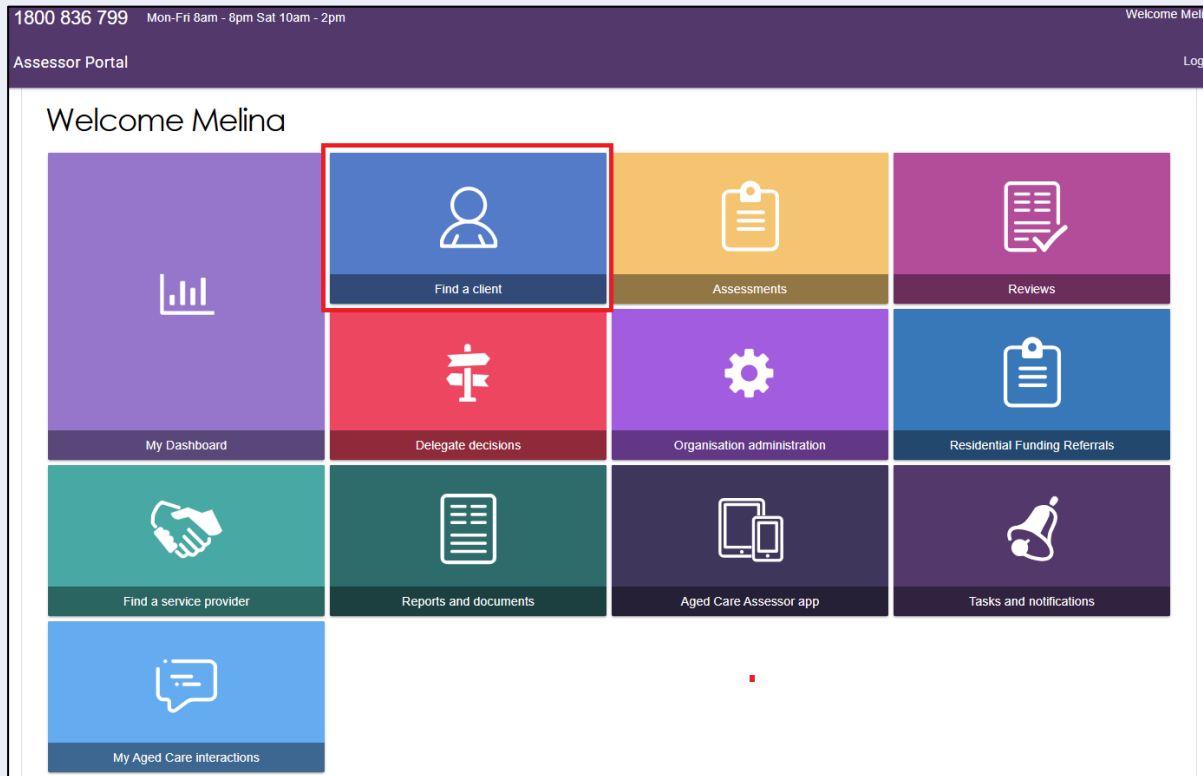
This guide is divided into the following topics:

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## Finding a client in the Portal

Before you register a person, you need to confirm that they do not already have a client record. Follow the steps below to determine if the client has an existing record.

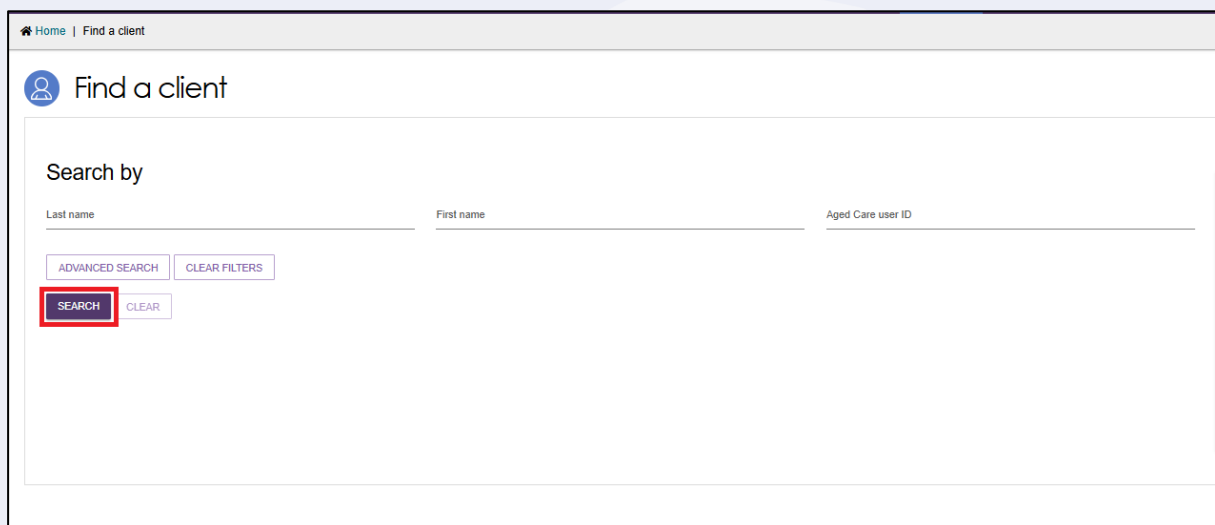
1. Select **Find a client** from the home page.



2. Next, search for the client. There are two ways to search: Normal or Advanced.

### Normal Search

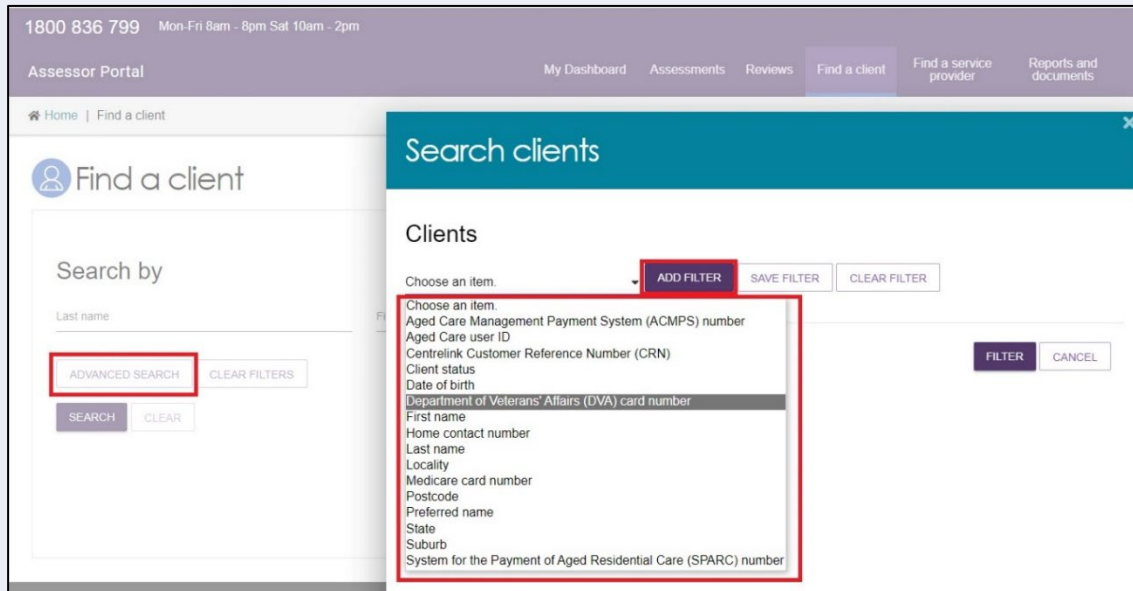
Enter the client's first name, last name and/or Aged Care User ID and select **SEARCH**.



## Advanced Search

Alternatively, you can select **ADVANCED SEARCH** to conduct a custom or refined search.

The Advanced Search functionality allows you to search by additional fields, such as date of birth, Medicare number, suburb, etc. This filter can be applied across various sections within the portal. Choose the required filter item from the dropdown menu and select **ADD FILTER**.

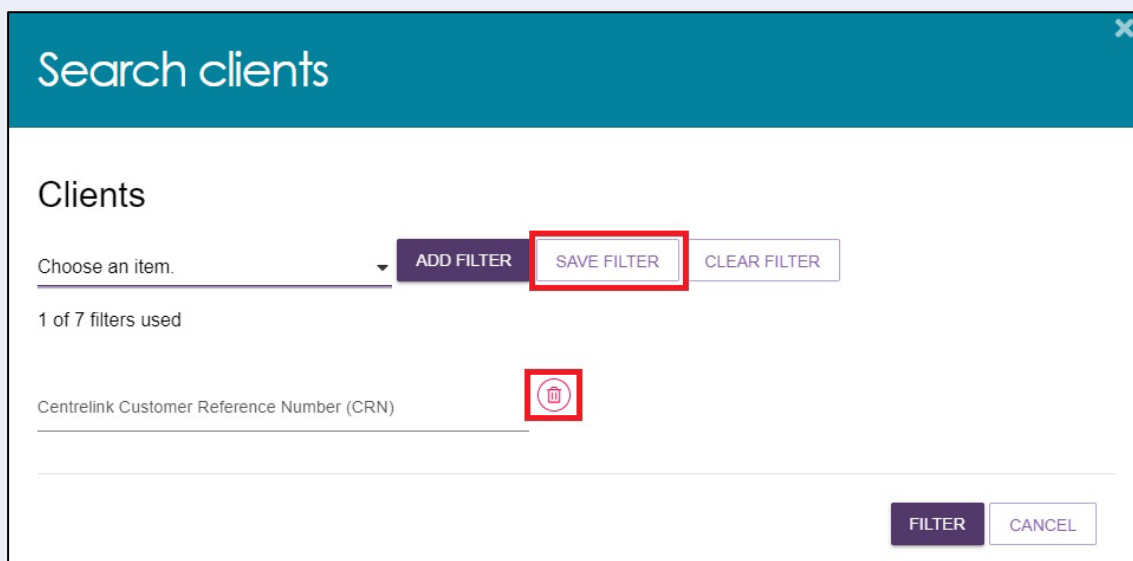


You can save a filter for future use by choosing the item and selecting **SAVE FILTER**.

This will display the custom filter (shown below) so it can be easily accessed in the future.

To remove a filter, select the red **Recycle Bin** button next to the filter you wish to remove. You can choose to add that filter back again.

To apply your chosen settings, select the **FILTER** button.



When filters have been applied, the **Advanced Search** link changes to **MODIFY FILTER OPTIONS**.

The screenshot shows a search interface with the following elements:

- Search by: Last name, First name
- Buttons: **MODIFY FILTER OPTIONS** (highlighted with a red box), CLEAR FILTERS
- Buttons: SEARCH, CLEAR

Selecting **CLEAR FILTERS** will clear the information entered.

Selecting **CLEAR** will clear any current search results.

Any matching search results will be displayed.

The results will be shown either in Card view or List view, depending on your selection.

### Example of card view

The screenshot shows search results in card view. The search criteria are: Last name: Smith. The results are displayed as four cards:

- Mike SMITH**: 1/1 Sesame Street, SYDNEY NSW 2000. Aged care user ID: AC85663847. Status: Deceased.
- Mary SMITH**: 12/1 Sesame Street, SYDNEY NSW 2000. Aged care user ID: AC12424131. Status: Active.
- Karl SMITH**: 4 Privet Drive, SURREY TAS 7999. Aged care user ID: AC93852184. Status: Deceased.
- Mel SMITH**: No address details found. Aged care user ID: AC47108998. Status: Active.

### Example of list view

The screenshot shows search results in list view. The search criteria are: Last name: Smith. The results are displayed as a table:

Last name	First name	Aged care user ID	Address	Locality	Status	Home contact number
SMITH	Mike	AC85663847	1/1 Sesame Street	SYDNEY, NSW, 2000	Deceased	
SMITH	Mary	AC12424131	12/1 Sesame Street	SYDNEY, NSW, 2000	Active	
SMITH	Karl	AC93852184	4 Privet Drive	SURREY, TAS, 7999	Deceased	81 2987 1234
SMITH	Mel	AC47108998	No address details found	No address details found	Active	

Where there are multiple search results, please ensure you review the records first to determine the appropriate client.



## Client summary

After selecting the appropriate client, the **Client summary** tab will display. This tab aims to provide a snapshot view of where a client is in their aged care journey. It contains key information the client, including:

- Assessment information
- Approvals
- Service recommendations
- Service delivery information
- Goals and reablement
- Any periods of linking support.

Information will only be displayed where it is applicable to the client.

The screenshot displays the 'Client summary' interface. At the top, there are navigation tabs: Client summary, Client details, Support network, Approvals, Plans, Attachments, Services, My Aged Care interactions, Notes, and Tasks and Notifications. The 'Client tracker' section shows a progress bar with four stages: Registered (checked), Assessment (checked), Waiting for services (checked), and Receiving services (pending). Below the tracker, there are three status messages: 'A support plan Review has been completed', 'One or more services have started', and 'All referrals for service have been actioned'. The main summary section is divided into three columns: Assessments (Home Support Assessment), Recommendations and approvals (Help at home, Domestic Assistance, Flexible Respite), and Service delivery status (ended on 4 January 2021).

3. If there are **No records returned** (as shown below), you can select **Register new client** for immediate assessment only.

! You must have the client's consent to successfully complete registration.

The screenshot shows the 'Find a client' search page. The search criteria are Last name: Client, First name: Clara, and Aged Care user ID. The search results show 'No records returned for IMMEDIATE ASSESSMENT only' and a red box around the 'Register new client' link.

## Registering a client in the Portal

After the search for a client returns no records (see above), the **Register a client** link will be displayed.

Enter client details and select **REGISTER**.

Home | Client

### Register a client

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

#### Personal details

Title:  First name:  Last name:

Gender:

Please enter the date of birth. If the date of birth is not known, please enter an estimated age in the Age field. This will then be used to automatically determine an approximate date of birth for the Client.

Date of birth:  OR Age:   
(e.g. dd/mm/yyyy)

Does the client identify as an Aboriginal or Torres Strait Islander?  Does the client prefer a First Nations Assessment Organisation for their assessment?

Consent to send SMS and emails about the client  
Please enter email address and mobile phone number if available.

Email address:

Country code:  Mobile phone number:  Contact phone number:   
(e.g. 02 1234 5678)

#### Identity match \*

To verify this person's identity with the Medicare system, please provide their Medicare Card Number. This will enable Identity Match to occur.

This person has a Medicare card.

Medicare card number

4 digits:  5 digits:  1 digit:  Reference:

This person does not have a Medicare Card Number.

#### Government ID \*

A government ID number will assist us with retrieving existing care approvals from Services Australia (if there are any).

This person has a government ID (tick all that apply).

- Aged Care Management Payment System (ACMPS) number
- System for the Payment of Aged Residential Care (SPARC) number
- Department of Veterans' Affairs (DVA) card number
- Centrelink Customer Reference Number (CRN)

This person does not have a government ID.

#### Consent

Has the client consented to register? \*

The details include Name, contact details, if the client identifies as Aboriginal or Torres Strait Islander, if the client has a preference for a First Nations Assessment Organisation (if available), Medicare number and status, government ID and status, and consent status.

**!** Note: First Nations assessment organisations will be standing up slowly over time to offer a choice for Aboriginal and Torres Strait Islander people from 1 July 2025. A limited number of pilot sites will commence in parts of Australia in March 2025. Over time, the service will extend its reach and work towards covering more areas across Australia.



! Remember to validate the address when you enter a new address or when you edit an existing address. This will ensure that any correspondence will be sent to the correct address.

Enter Suburb and postcode and select from the list below \*

WEST WODONGA, VIC, 3690

SUBURB IS NOT LISTED, CLICK HERE

Country \*

Australia

VALIDATE THIS ADDRESS

Did you mean

- 1 HANLON Court WEST WODONGA VIC 3690
- 2 HANLON Court WEST WODONGA VIC 3690
- 3 HANLON Court WEST WODONGA VIC 3690
- 4 HANLON Court WEST WODONGA VIC 3690
- Not found, use entered address anyway: Milpara Unit 36 7 HANLON Court WEST WODONGA VIC 3690

## Email and SMS Notifications

! Client email addresses and/or mobile phone numbers can be captured at registration. You must have the client's consent to receive email and/or SMS notifications.

Clients and/or their representatives can nominate an email address and/or mobile phone number to receive notifications when they reach key stages of their My Aged Care journey.

To set up email and/or SMS notifications for a client at registration, select the **Consent to send SMS and emails about the client** checkbox and input an email address and/or mobile phone number.

Consent to send SMS and emails about the client

Please enter email address and mobile phone number if available.

Email address:

c.client@client.com.au

Country code: Australia +61

Mobile phone number: 0412345678

Contact phone number: (e.g. 02 1234 5678)

Email and/or SMS notification preferences can be viewed or modified on the **Client details** tab in the assessor portal. Refer to the [My Aged Care – Assessor Portal User Guide 2 – Registering support people and adding relationships](#) for information about enabling email notifications for existing clients and representatives.

## Registering or assessing a client in the App

If you are using the App and you need to undertake an assessment for a client who has not been referred to your organisation, you can use the **Add offline client** function. See the [Aged Care Assessor App User Guide](#) for this process.

When you are reconnected to the Internet, you will need to register the client if they do not have an existing record and facilitate a referral for assessment via the contact centre before linking the offline client to the registered record.



## Verifying a client's identity

1. From the Client Record in **Find a client**, you can verify the client's identity by selecting **Conduct a wallet check now**. The wallet check can also be conducted through the App or at other stages of the assessment.

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

Assessor Portal Logout

Home | Find a client | Cassius CLIENT

**Cassius CLIENT**  
Male, 79 years old, 1 July 1943, AC22569016  
Prefers to speak Greek

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

Client details REFER THIS CLIENT FOR ASSESSMENT VIEW CLIENT REPORT

**!** We still need to check the client's ID in person (a wallet check).  
Please verify the client's identity when you next see them (two pieces of ID such as a Medicare or Health card bill or other membership).  
Conduct a wallet check now.  
If possible, please verify Cassius Client's mobile phone number when you are with them.

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

Residential Funding Classifications

2. A dialog box appears. Select the appropriate scenario and then select **SAVE DETAILS**.

If you select **My client has identification**, you will then be prompted to enter two types of ID and the date that you have performed the check.

If you select **My client has no valid identification this time**, you will then be prompted to ask the client for ID in the future.

If you select **My client will be unable to produce valid identification**, you will not be prompted to ID-check this client in the future.

Wallet check

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

Client wallet check:\*

My client has identification

My client has no valid identification this time

My client will be unable to produce valid identification

SAVE DETAILS CANCEL

## Self-referring a client

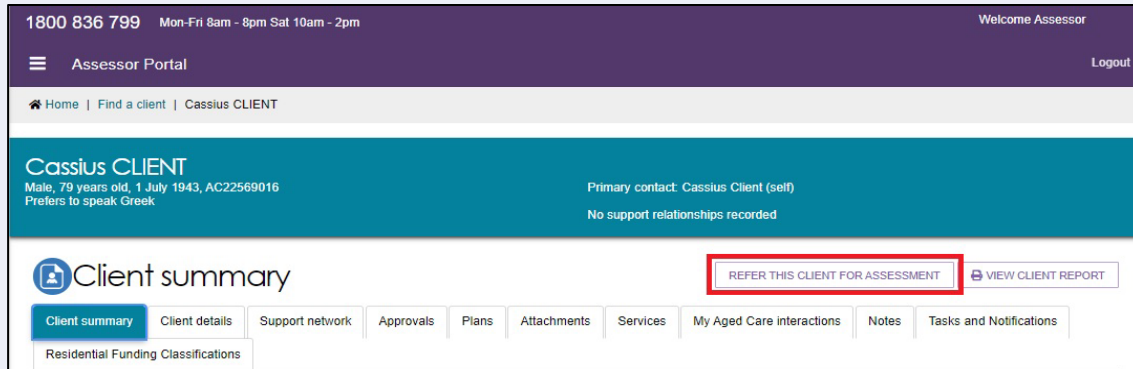
**!** Triage must be completed by a clinical staff member who holds the Triage Delegate role in the My Aged Care assessor portal.

For further information on the Triage Delegate role, visit [My Aged Care Assessor Portal User Guide 12 – Managing Delegate Roles](#).



! Assessors can self-refer clients for assessment as long as the assessment type is support by their outlet. For example, non-clinical aged care needs assessors (non-clinical assessors) can self-refer for both Home Support and Comprehensive assessments if their outlet supports both assessment types.

From the Client record in **Find a client**, you can self-refer the client for assessment by selecting **REFER THIS CLIENT FOR ASSESSMENT**.



The screenshot shows the Assessor Portal interface. At the top, there is a header with the phone number 1800 836 799, operating hours (Mon-Fri 8am - 9pm, Sat 10am - 2pm), and a 'Welcome Assessor' message. Below the header is a navigation bar with 'Assessor Portal' and a 'Logout' button. The main content area displays the client record for 'Cassius CLIENT', including personal details (Male, 79 years old, 1 July 1943, AC22569016, Prefers to speak Greek) and contact information (Primary contact: Cassius Client (self), No support relationships recorded). A 'Client summary' section is visible, with a red box highlighting the 'REFER THIS CLIENT FOR ASSESSMENT' button. Other buttons include 'VIEW CLIENT REPORT' and a series of tabs for 'Client summary', 'Client details', 'Support network', 'Approvals', 'Plans', 'Attachments', 'Services', 'My Aged Care interactions', 'Notes', and 'Tasks and Notifications'.

1. In the pop-up box you will need to:

- assign the client to Myself or to My Organisation
- select the assessment type (comprehensive or home support)
- select the outlet for this referral
- select the assessment setting (for comprehensive assessments only)
- choose the assessment priority rating (High, Medium, Low)
- the reason for self-referring (remote assessment, first nations, in-hospital, homeless or at risk of or vulnerable).

Then, select **CREATE REFERRAL**.

**Refer client for assessment**

**i** If the client has a scheduled, submitted or assigned Support Plan Review, by referring the client for a new assessment, the scheduled, submitted or assigned Support Plan Review will be cancelled when the new assessment has been accepted by the Assessment Organisation.

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

An Aged Care Assessment referral will be created for Aadi Smith.

Assign this referral to\*

Myself

My Organisation

Please select the assessment type \*

Comprehensive Assessment

Please select outlet for this referral \*

Assessment setting: ?

Hospital

Non-Hospital

Priority: ?

Low

Reason for self-referring \*

**CREATE REFERRAL** CANCEL

**!** If the client has a preference for their assessment to be completed by a First Nations Assessment Organisation this will display in both the blue banner and the amber banner.

**Refer client for assessment**

**i** The client has indicated a preference for First Nations Assessment Organisation to do their assessment. If the client has a scheduled, submitted or assigned Support Plan Review, by referring the client for a new assessment, the scheduled, submitted or assigned Support Plan Review will be cancelled when the new assessment has been accepted by the Assessment Organisation.

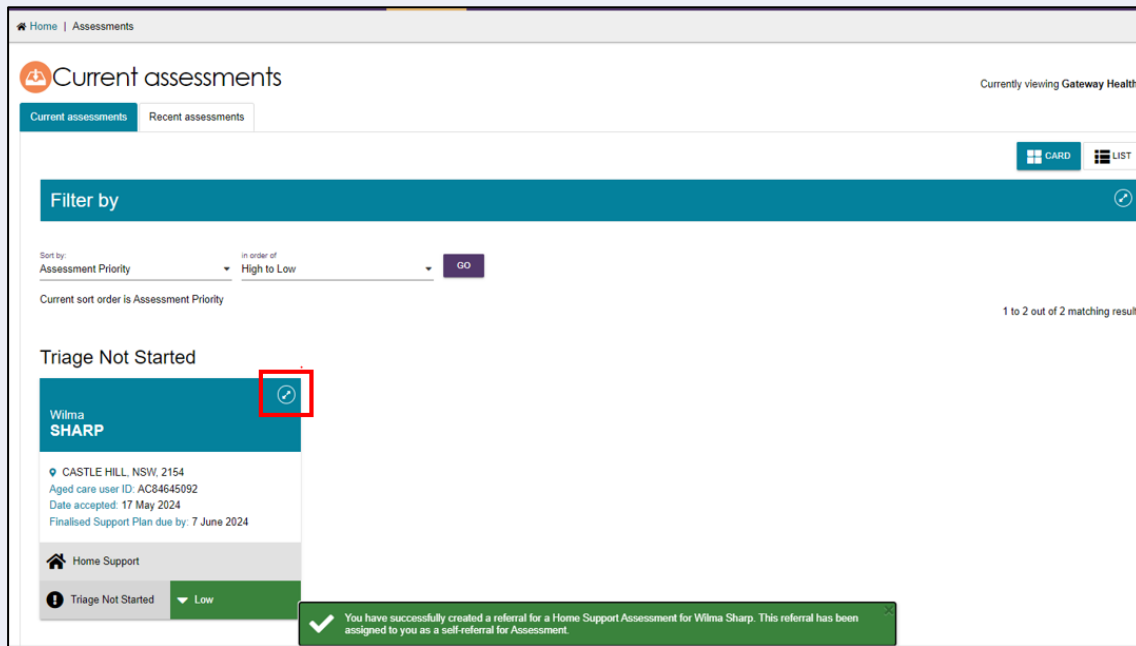
**!** You are assigning the assessment referral of a client who has preference for the assessment to be done by First Nations Assessment Organisation.

Please note, where you identify a potential client with aged care needs that is cohabitating with the current client at the time of the assessment, the assessor may wish to encourage that person to contact My Aged Care to request screening which will determine eligibility for an assessment referral. For more information, please refer to [Facilitating a referral for a potential client](#).

2. If you have selected to assign the referral to yourself, you will then be re-directed to the **Current assessments** page. To complete the assessment, you must first undertake triage.



To begin triage, select the expand button at the top right of the client card.



Home | Assessments

Current assessments

Currently viewing Gateway Health

Filter by

Sort by: Assessment Priority | In order of: High to Low | GO

Current sort order is Assessment Priority

1 to 2 out of 2 matching results

Triage Not Started

Wilma SHARP


CASTLE HILL, NSW, 2154  
Aged care user ID: AC84645092  
Date accepted: 17 May 2024  
Finalised Support Plan due by: 7 June 2024

Home Support

Triage Not Started | Low

✓ You have successfully created a referral for a Home Support Assessment for Wilma Sharp. This referral has been assigned to you as a self-referral for Assessment.

- Next, select **START TRIAGE** and complete the relevant consent and demographic fields. Refer to the [My Aged Care – Assessor Portal User Guide 3 – Managing Referrals for Assessment and Support Plan Reviews](#) for more information.



Jane SHARPLAND

Please confirm that Jane SHARPLAND, 29 April 1950, 74 Years, AC12140521 is the person you are conducting this assessment for. If the person details are incorrect, a privacy breach may occur.

Aged 74 ( 29 April 1950 ), Female, Identifies as: Aboriginal | Referred from UAT LCHS - East Gippsland RAS on 4 February 2025  
Accepted on 4 February 2025

Preferences  
No preference was recorded

Completed Triage due by 7 February 2025

Assessment details

FNAO-preference Yes

Assessment type Home Support

Assessment reason Self-Referral

Assessor Louie Hinson

Client story  
No client story was recorded

Comments

VIEW FULL CLIENT RECORD | VIEW CLIENT REPORT

START TRIAGE | REFER URGENT SERVICES

If you have assigned the referral to **Yourself** and you are also a Triage Delegate, you can complete triage and then proceed to the assessment using the IAT.

If you have selected to assign the referral to **Yourself** and you are not a Triage Delegate, then you will only be able to complete triage with the supervision of a Triage Delegate. This must be



captured in the portal at the time of triage.

To record the details of your supervision, at the bottom of the triage questions is a **Details of the supervised Triage** section. Select the relevant supervisor and then select **SAVE TRIAGE**. You will then be able to proceed with completing the assessment using the IAT.

Home | Assessments | Triage

**Mrs Wilma SHARP**

Gender not specified, 55 years old, 25 August 1968, ACB#645992  
Lot Number 35 1 CELESTE AVENUE, CASTLE HILL, NSW, 2154

Linking Supports suggested for assessment\* 0 / 500

Outcome/advice for assessment notes\* 0 / 500

**Details of the supervised Triage**

Triage supervised by\*  
Start to type...

SAVE TRIAGE CANCEL TRIAGE - NO FURTHER ACTION REQUIRED

If you later choose to reject a self-referred client, you must include a detailed rejection reason that will allow the My Aged Care contact centre to appropriately action the rejected case referral and ensure the client is not delayed in receiving an assessment they may require.

### Facilitating a referral for a potential client

A client referral must be assigned to you in the assessor portal before you can complete an assessment for that client. If the potential client has aged care needs that is cohabitating with the current client at the time of the assessment and who has not been referred to you, follow the steps below.

1. Encourage the person to contact My Aged Care contact centre on 1800 200 422 to request screening which will determine eligibility for an assessment referral.
2. Once eligibility is determined, a team leader will need to accept the referral in the assessor portal.
3. A Triage Delegate will then need to complete triage.
4. Following this the Triage Delegate or a Team Leader can then assign it to an assessor.
5. If the referral is assigned to you, it will appear in your **Current assessments** list in the **Assessments** tile. From here, you will be able to begin the assessment.



# Current assessments

Currently viewing : AGED CARE

Current assessments   Recent assessments

CARD   LIST

Filter by

Sort by: Assessment Priority   in order of: High to Low   GO

Current sort order is Assessment Priority

1 to 2 out of 2 matching results

**Assessment Not Started**

<p><b>Mark JUNE</b></p> <p>Aged care user ID: AC15704125 Date accepted: 20 September 2024 Completed Triage due by: 23 September 2024</p> <p>Comprehensive   Due in 3 days</p> <p>Assessment Not Started   <b>Medium</b></p>	<p><b>Fred DENNI</b></p> <p>Aged care user ID: AC60735827 Date accepted: 19 September 2024 Completed Triage due by: 22 September 2024</p> <p>Comprehensive   Due in 2 days</p> <p>Assessment Not Started   <b>Low</b></p>
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