



Assessor Portal User Guide 8 - Referring for services

A client may require services to support their needs as a result of an assessment.

Aged care needs assessors (assessors) may refer the client (with consent) for service recommendations made in the client’s support plan, based on the client’s preferred service provider (or prioritised list of service providers) and location preferences.

They can then send electronic referrals for services, or provide the client with a referral code that allows them to visit providers prior to selecting their preferred provider.

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Referral Types

For service recommendations made in the client's support plan, you can search for and match a client to a preferred service provider (or prioritised list of service providers) based on the client's preferred location and/or preferences.

! You must obtain consent from the client and/or their authorised representative prior to issuing a referral. This is complete by using the referral for services components of the My Aged Care Assessment Consent Form, which is available for download in the Documents & Reports tile in the My Aged Care assessor portal (assessor portal).

There are three types (modes) of referrals. You can:

- send a Sequential referral for service
- send a Broadcast referral for service or
- provide the client with a referral code that allows them to visit providers prior to selecting their preferred provider.

You can also decline to refer, by issuing a "No Care Approval".

Sequential Mode

The assessor will send the client's referral to their chosen provider/s in the order of their preference. The client can limit their preference to one or more providers. If their first preference is not available, the referral is automatically sent to next preference.

Broadcast Mode

The assessor will send the client's referral to all available providers. In agreeing to a broadcast referral, multiple providers could contact the client to see if they can provide them with the service/s. If a provider accepts their referral, the other provider/s will no longer see their information.

Referral Codes

For **residential aged care services**, assessors will normally generate a referral code for the client rather than issuing an electronic referral (Sequential or Broadcast referral) to service through the assessor portal. Electronic referrals for residential aged care service providers would only be expected where the client has indicated a preferred residential provider or has already discussed care options with a provider.

For **Home Care Package services**, once a client is assigned a package from the National Priority System, they will also be assigned a referral code. This code will be mailed to the client with their package assignment/upgrade letter. Alternatively, assessors can provide this code (available in the client's support plan) to the client to allow them to visit home care providers prior to selecting their preferred provider. In addition, where the client has indicated a preference or discussed options with a home care provider, assessors can issue an electronic referral.

No Care Approval

If you have recommended 'No Care Approval' due to the client withdrawing their application for care or not wishing to apply for care under the Act, you can select **COMPLETE SUPPORT PLAN AND CONTINUE TO MATCH AND REFER** from any tab in the client's support plan.

COMPLETE SUPPORT PLAN AND CONTINUE TO MATCH AND REFER

Issuing a referral for service

! PRIOR CONSENT REQUIRED

You must obtain consent from the client or their representative in their support network prior to issuing a referral. You should use the My Aged Care Assessment Consent Form. The Consent Form includes the consent scripts and fields to record the consent for service referrals. It is located via the Reports and documents tile within the assessor portal.

1. When you have finished developing the support plan with the client, select **COMPLETE SUPPORT PLAN AND CONTINUE TO MATCH AND REFER**.

Fred DENNI
Male, 84 years old, 1 July 1940, AC60735827
Prefers to speak AusEic.
Primary contact: Fred Denni (self)
No support relationships recorded

ADD AREA OF CONCERN

Concern: to be more active in every day life

ADD A GOAL

Goal: to do activities and tasks by themselves

Other recommendations

ADD A GENERAL RECOMMENDATION | ADD A SERVICE RECOMMENDATION | ADD RECOMMENDED LONG TERM LIVING ARRANGEMENT | ADD A CARE TYPE FOR DELEGATE DECISION | ADD 'NO CARE' TYPE UNDER THE ACT | RECOMMEND A PERIOD OF LINKING SUPPORT | RECOMMEND A PERIOD OF REABLEMENT

There are no service recommendations for this client

Recommendation Develop Emergency Care Plan Responsibility to action: Client Recommended by: Larae Farrell (My Agedcare Contact Centre)	Recommendation Obtain a smoke alarm Responsibility to action: Client Recommended by: Larae Farrell (My Agedcare Contact Centre)
Recommendation Connect with GP or other health professional Responsibility to action: Client Recommended by: Larae Farrell (My Agedcare Contact Centre)	Recommendation To exercise twice per week Responsibility to action: Client Recommended by: Africa Green (Assessor) GRAZIER AGED CARE Outlet ACAT-RAS

COMPLETE SUPPORT PLAN AND CONTINUE TO MATCH AND REFER | RETURN TO CLIENT

2. You will be taken to the **Manage services & referrals** tab. The services added in the **Goals and recommendations** tab of the support plan will be displayed under **Services not yet in place**.

Select **FIND PROVIDERS** to search and create electronic referrals for services.

Support plan and services
COMPREHENSIVE ASSESSMENT 19 SEPTEMBER 2024 | PRINT COPY OF SUPPORT PLAN

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

Services not yet in place

Help at home

Select all Help at home

Allied Health and Therapy Services
• Occupational Therapy

● Medium
Associated with goal(s): to do activities and tasks by themselves
Recommended By: Africa Green
User Type: Assessor

● Not actioned

FIND PROVIDERS | ISSUE REFERRAL CODE | REMOVE THIS SERVICE RECOMMENDATION

To search for multiple services at the same time, select the services you wish to search for and click **FIND HELP AT HOME PROVIDERS**.

The screenshot shows a web interface titled "Help at home". At the top, there is a checkbox labeled "Deselect all Help at home With 2 selected". Below this, two service recommendations are listed. Each recommendation has a checkbox on the left, a title, a priority level (Low), a status (Not actioned), and a recommended service frequency. The first service is "Allied Health and Therapy Services" with a frequency of "1 days per week". The second is "Domestic Assistance" with a frequency of "1 hours per day". Both are recommended by "Steve Herrera" and the user type is "Assessor". Below each recommendation are three buttons: "FIND PROVIDERS", "ISSUE REFERRAL CODE", and "REMOVE THIS SERVICE RECOMMENDATION". At the bottom of the interface is a button labeled "FIND HELP AT HOME PROVIDERS".

3. A page will be displayed that displays the services you ticked in the previous step. It allows you to enter the search criteria for the service. Depending on the service type you are searching for, the search criteria may include, but not necessarily be limited to, the following:

- The list of 'service sub types' that are available for the service selected, to further refine the search for a specific client need
- The client's service delivery address for location-based searches
- Preferred service delivery setting: client location or service provider location
- Direct search for service providers by name or by proximity on a map.

Depending on the service selected, a location search may either be region/area based (e.g. domestic assistance services delivered to the client's home) or proximity based (e.g. a centre or facility).

Detailed search options are available, including whether the client has previously received services with the service provider, or any specialisations required to cater for a client's diverse or specialised needs.

Home | Support plan and services

Choose service provider for Harold Hillcrest

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

Service Finder

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

Locate these services:

Allied Health and Therapy Services

- Hydrotherapy
- Speech Pathology
- Podiatry
- Physiotherapy
- Diverisional Therapy
- Ongoing Allied Health and Therapy Services
- Psychologist
- Social Work
- Dietitian or Nutritionist
- Occupational Therapy
- ATSI Health Worker
- Exercise Physiologist
- Other Allied Health and Therapy Services
- Restorative Care Services

No associated goals

Using this location or service provider name:*

Use the client's address Enter a suburb/postcode Enter a service provider name Select a location

Diverse needs: ?

- Culturally and linguistically diverse
- Veterans
- Financially or Socially disadvantaged people
- Homeless or at risk of becoming homeless
- People who live in rural or remote areas
- Aboriginal and/or Torres Strait Islander peoples and communities
- Lesbian, gay, bisexual, transgender and intersex people
- Care-leavers
- Parents separated from their children by forced adoption or removal

Specialised services: ?

- Dementia
- Caters for cultural, spiritual or ethical food requirements
- Terminal illness

Preferred language chosen:

Preferred client language

Using the following advanced options:

Previously used by client Show only funded services

For Home Care Packages, you are able to search for service providers by specific home care service attributes including: Diverse needs, Specialised services, Language, Culture, Religion, Out of Hours service and Case management availability. This can be done by selecting **Advanced search** when choosing a service provider.

Service Finder

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

Locate these services:

Home Care Package Level 4

Home Care Package: ?

- Home Care Package Level 1
- Home Care Package Level 3
- Home Care Package Level 2
- Home Care Package Level 4

Using this location or service provider name:*

Use the client's address Enter a suburb/postcode Enter a service provider name

Client address
23 FURZER Street
PHILLIP ACT 2005

Advanced search ?

Diverse needs: ?

- Aboriginal and/or Torres Strait Islander
- People who live in rural or remote areas
- Veterans
- Care-leavers
- Lesbian, gay, bisexual, transgender and intersex people
- Culturally and linguistically diverse
- Financially or Socially disadvantaged people
- Homeless or at risk of becoming homeless
- Parents separated from their children by forced adoption or removal

Specialised services: ?

- Dementia
- Continence
- Hearing
- Respite care
- Wellness and reablement
- Mental Health
- Vision
- Terminal illness
- Mobility
- Assistive Technology



4. Enter the search criteria. Some further criteria displays depending on previous selections, such as how a service is delivered. Then, select the **SEARCH** button.

Service Finder (hide search fields) 

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

Locate these services:

Allied Health and Therapy Services

<input type="checkbox"/> Hydrotherapy	<input type="checkbox"/> Social Work
<input type="checkbox"/> Speech Pathology	<input type="checkbox"/> Dietitian or Nutritionist
<input type="checkbox"/> Podiatry	<input type="checkbox"/> Occupational Therapy
<input checked="" type="checkbox"/> Physiotherapy	<input type="checkbox"/> ATSI Health Worker
<input type="checkbox"/> Diversional Therapy	<input type="checkbox"/> Exercise Physiologist
<input type="checkbox"/> Ongoing Allied Health and Therapy Services	<input type="checkbox"/> Other Allied Health and Therapy Services
<input type="checkbox"/> Psychologist	<input type="checkbox"/> Restorative Care Services

No associated goals

Using this location or service provider name:*
 Use the client's address Enter a suburb/postcode Enter a service provider name Select a location

Enter suburb or postcode and select from the list below.*
 HOBART, TAS, 7000

That will be delivered:*

In a home environment
 In a centre/facility environment

Diverse needs: 

<input checked="" type="checkbox"/> Culturally and linguistically diverse	<input type="checkbox"/> Aboriginal and/or Torres Strait Islander peoples and communities
<input type="checkbox"/> Veterans	<input type="checkbox"/> Lesbian, gay, bisexual, transgender and intersex people
<input type="checkbox"/> Financially or Socially disadvantaged people	<input type="checkbox"/> Care-leavers
<input type="checkbox"/> Homeless or at risk of becoming homeless	<input type="checkbox"/> Parents separated from their children by forced adoption or removal
<input type="checkbox"/> People who live in rural or remote areas	

Specialised services: 

<input type="checkbox"/> Dementia	<input type="checkbox"/> Terminal illness
<input type="checkbox"/> Caters for cultural, spiritual or ethical food requirements	

Preferred language chosen:
 Preferred client language 

Using the following advanced options:

Previously used by client Show only funded services

SEARCH

When searching for services provided at a centre/facility, assessors are also able to select a location on a detailed visual map when matching and referring a client for service.

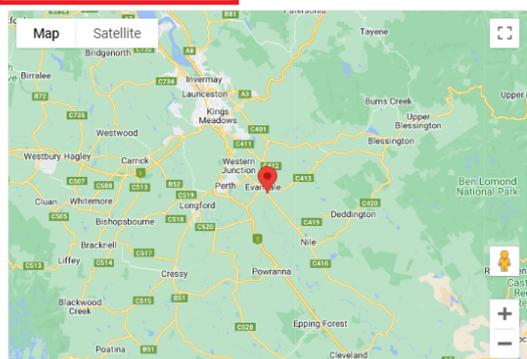
Select a location on the map by placing a pin, this pin may be moved to select a different location, and assessors can navigate around the map to view areas adjacent to the one currently displayed.

When searching by using the map functionality, the search results displayed will contain a list of service providers who provided services at a service delivery address within the search radius entered.

Using this location or service provider name:*
 Use the client's address Enter a suburb/postcode Enter a service provider name **Select a location**

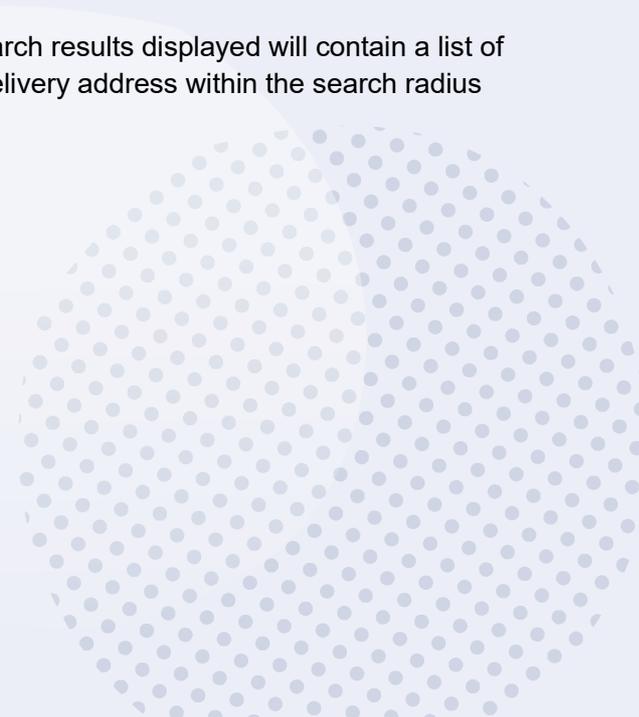
That will be delivered:* In a centre/facility environment

Within **km of the centre/facility**



Map Satellite 

Keyboard shortcuts Map data ©2022 Google Terms of Use



- View the search results. The search results will be sorted to display the most relevant service providers first or randomised in the case of equal relevance.

By default, you will be able to view the search results of service providers plotted on a detailed, interactive map. You can click **Hide Map** to switch to the list view and click **Show Map** when in the list view to revert to the map view.

The search results will display search results in the following configuration depending on the criteria used when searching for services.

Search method	Service delivery location	Map View	List View
Client Address; or Suburb/Postcode	At Client Location	Outlet Address	Outlet Address
Client Address; or Suburb/Postcode; or Select A Location	At Provider Location	Address where services will be delivered	Outlet Address and service delivery address (under the individual service)
Service provider name	N/A	Map will be hidden for all services except Residential Care services	Outlet Address and service delivery address (under the individual service)

As services can be offered at both provider and client location in a service delivery outlet (with the exception of residential care services) the map will be hidden when searching by service provider name, as these results will not display consistently on the map.

The availability of services, service sub-types and waitlist options are displayed for each service provider.

MAP VIEW

The screenshot shows the 'Service Finder' interface with the following details:

- Header:** Service Finder (show search fields)
- Results:** 4 Service Providers found. Sort results by Relevance. A 'HIDE MAP' button is visible.
- Provider 1:** Welcoming Provider, 111 Care Avenue, ALICE SPRINGS NT 0870, 01 2345 6789. Specialisations: Residential Permanent. Status: Available, Waitlist.
- Provider 2:** NT Aged Care Service, 555 Help Street, BRAITLING NT 0870, 08 8725 4321. Specialisations: Residential Permanent. Status: Available, Waitlist.
- Provider 3:** Alice Springs Resident House, 888 Fortune Road, ALICE SPRINGS NT 0870, 55 6789 9876. Specialisations: Residential Permanent. Status: Available, No Waitlist.
- Map:** A map view showing the location of the providers in Alice Springs, NT. A red pin is placed on the map. A legend at the bottom of the map states: 'Searches by location, client address and suburb/postcode will display the address where services will be delivered. Searches for services provided at the client's location will display results based on service delivery outlet address and should only be used as a guide, as the outlet address may not reflect where a service is provided.'

LIST VIEW

Service Finder (show search fields)

4 Service Providers found Sort results by Relevance

Welcoming Provider
 111 Care Avenue ALICE SPRINGS NT 0870 01 2345 6789
 Select Preference
 Residential Permanent Available Waitlist
 Specialisations

NT Aged Care Service
 555 Help Street BRAITLING NT 0870 09 8765 4321
 Select Preference
 Residential Permanent Available Waitlist
 Specialisations

Alice Springs Resident House
 888 Fortuna Road ALICE SPRINGS NT 0870 55 6789 9876
 Select Preference
 Residential Permanent Available No Waitlist

Sub-type availability or specialisations can be accessed as illustrated below.

Select the arrows next to **Sub-type availability** or **Specialisations** to view more detailed information about the service sub-types (including availability and wait list availability) and specialised service offerings of each service provider. For Diverse Needs, only verified diverse needs specialisations will be shown.

Aged Care Inc - Outlet 1
 62 4 CRISP Circuit BRUCE ACT 2617 02 2821 2453

Select Preference

Meals Available No Waitlist
 Sub-type availability
 At Centre Available No Waitlist
 At Home Available No Waitlist

Specialisations
 Diverse needs:
 Specialised services:
 Languages:

- Aboriginal and/or Torres Strait Islander
- Lesbian, gay, bisexual, transgender and intersex people
- Culturally and linguistically diverse
- Specific services for people with dementia
- Dementia
- Mandarin
- Spanish

Assessors are able to access a detailed page that replicates the information on the My Aged Care service finder by selecting the service name hyperlink under the service provider's name.

Assessors can view any regulatory decisions made against the provider by selecting the **Regulatory decisions are available here** hyperlink under the provider's contact details. For care types under the Act, this page will also include information around the status of the service, costs of service etc. For example, Residential Permanent services outline information around the facility's accreditation and costs for different room types.

Information details for Welcoming Provider

Welcoming Provider
 Previously known as Welcoming House
 Locally known as Not Supplied
 09 8765 4321
 www.welcomingprovider.com.au
 Commonwealth government subsidised
 Accredited
 Available
 Regulatory decisions are available here

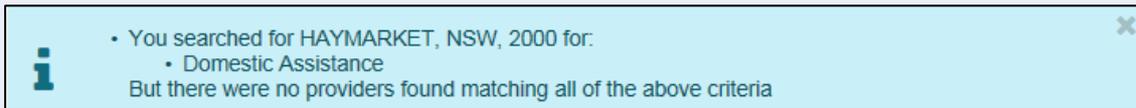
Description Services Costs

Street address: 111 Care Avenue ALICE SPRINGS NT 0870
 Business address: 111 Care Avenue KILGARIFF NT 0873
 Phone: 01 2345 6789
 Fax:
 Email: welcome@welcomingprovider.com.au

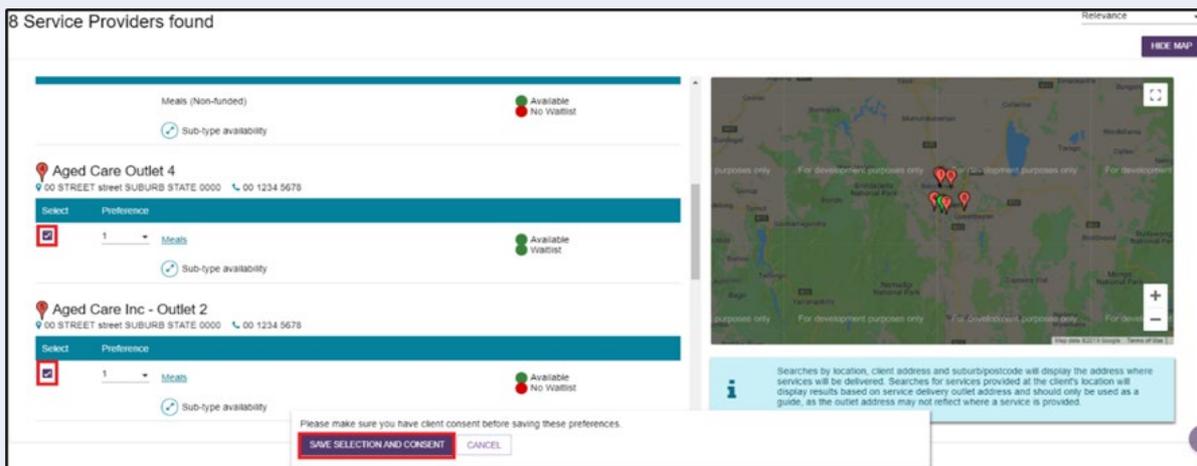
Map Satellite
 Welcoming House is a 40 bed Aged Care Home.



6. The following message will be displayed if an appropriate service provider is not found:



7. Select the client's preferred service provider(s), ensure that you have the client's consent to send the referrals, and select **SAVE SELECTION AND CONSENT**.
 - For [broadcast referrals](#), set preferences for all service providers to **1st**. In agreeing to a broadcast referral, the client needs to be aware that multiple providers could contact them about their service referral.
 - For [sequential referrals](#), set preferences for service providers in order of the client's preference.



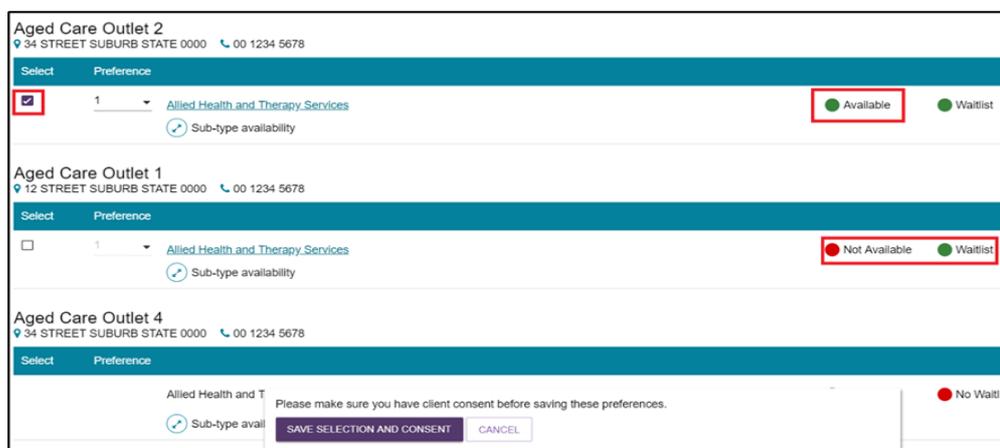
! Waitlisting

If none of the client's preferred service providers are available, they may wish to be placed on a waitlist. The search results will indicate whether a service provider has a waitlist available.

When referrals are sent sequentially and a provider accepts a client on to a waitlist, this will automatically trigger a referral to be issued to the next preference.

Clients may choose to be on multiple waitlists at the same time.

Clients will remain on a provider's waitlist until the provider indicates services are available and accepts the client referral.



8. The selected service provider(s) will now display as saved against the recommended service.

Meals

Low

No associated goals

Recommended By: Steve Herrera

User Type: Assessor

Recommended service frequency: 3 hours per day

Not actioned

Selected providers

- Aged Care Inc - Outlet 1
- Aged Care Outlet

SEND REFERRALS CHANGE THIS SELECTION ISSUE REFERRAL CODE REMOVE THIS SERVICE RECOMMENDATION EDIT PREFERENCES

9. To edit or remove existing provider preferences, select **EDIT PREFERENCES**.

Meals

Low

No associated goals

Recommended By: Steve Herrera

User Type: Assessor

Recommended service frequency: 3 hours per day

Not actioned

Selected providers

- Aged Care Inc - Outlet 1
- Aged Care Outlet

SEND REFERRALS CHANGE THIS SELECTION ISSUE REFERRAL CODE REMOVE THIS SERVICE RECOMMENDATION EDIT PREFERENCES

10. To issue electronic referrals, select **SEND REFERRALS**.

SEND REFERRALS CHANGE THIS SELECTION ISSUE REFERRAL CODE REMOVE THIS SERVICE RECOMMENDATION EDIT PREFERENCES

Select **CHANGE THIS SELECTION** to choose additional provider preferences.

11. A screen will be displayed for you to review preferences and capture any other information relevant to the service provider prior to issuing the referrals. Once all information has been reviewed, click **SEND REFERRALS**.

Referral for service - Kevin Hamm

You are about to send referrals to the following providers. To change your preference order use the options below.

SET ALL PREFERENCES TO 1ST

Preference	Remove	Service Provider
1st	<input type="checkbox"/>	Aged Care Inc - Outlet 1
1st	<input type="checkbox"/>	Aged Care Outlet

Meals

No associated goals

Client preferences

No preferences found

Comments to the provider for this referral

SEND REFERRALS CANCEL

12. You will receive a confirmation message that referrals have been sent. You will also be able to see a visual indicator of the status of the referrals.

Once the referral has been accepted, the service will be displayed under 'Services in place'.

The referral statuses that will display are:

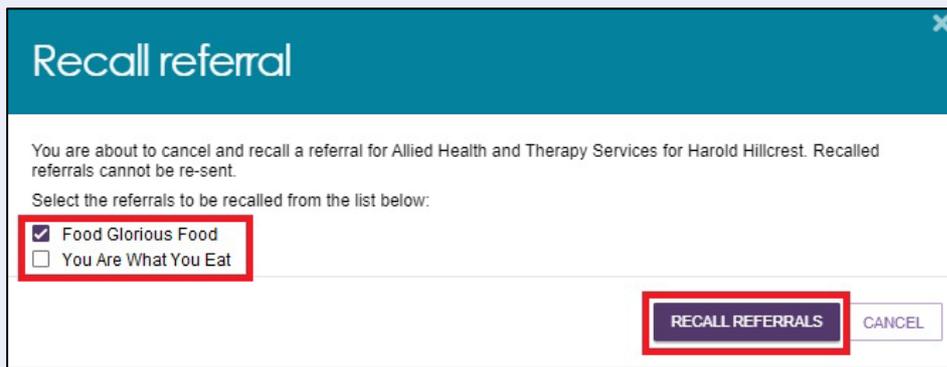
Category	Status
Service not yet in place	Not actioned, Rejected referral, Recalled referral, Referral/s pending, Accepted to waitlist
Services pending	Referral code generated, Referral accepted but services have not commenced
Service in place	Services are being provided
Home Care	Package Unassigned, Package Assigned, Package Committed, Package Withdrawn, Package Declined.

Recalling a referral

When a referral for service is issued, it is expected that the service provider will action the referral by accepting or rejecting it. You can recall the referral before the service provider actions it.

1. On the **Manage services & referrals** tab, select the **RECALL** button to recall the referral.

2. A pop up box will be displayed. Select which provider to recall the referral from and select **RECALL REFERRALS**.



Recall referral

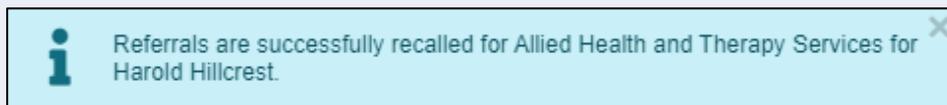
You are about to cancel and recall a referral for Allied Health and Therapy Services for Harold Hillcrest. Recalled referrals cannot be re-sent.

Select the referrals to be recalled from the list below:

- Food Glorious Food
- You Are What You Eat

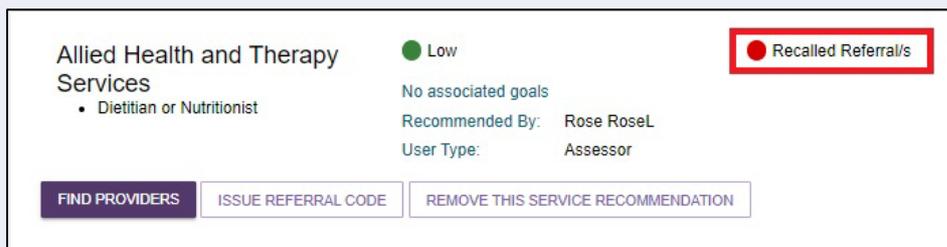
RECALL REFERRALS CANCEL

3. You will receive a banner confirming that the referral/s are successfully recalled.



i Referrals are successfully recalled for Allied Health and Therapy Services for Harold Hillcrest.

The referral status will be updated to **Recalled Referrals**. In the case of sequential preference referrals, the status of the referral will not change to **Recalled Referrals** until the final preference has been recalled. If you recall a referral, you cannot send it to the same provider again. You are able to send referrals to different providers for that service.



Allied Health and Therapy Services

- Dietitian or Nutritionist

● Low

No associated goals

Recommended By: Rose RoseL

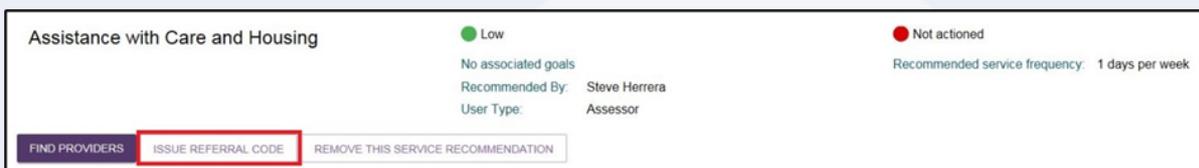
User Type: Assessor

● Recalled Referrals/s

FIND PROVIDERS ISSUE REFERRAL CODE REMOVE THIS SERVICE RECOMMENDATION

Issuing a referral code

1. Select the **Manage services & referrals** tab from the client's Support Plan and select **ISSUE REFERRAL CODE** for the service.



Assistance with Care and Housing

● Low

No associated goals

Recommended By: Steve Herrera

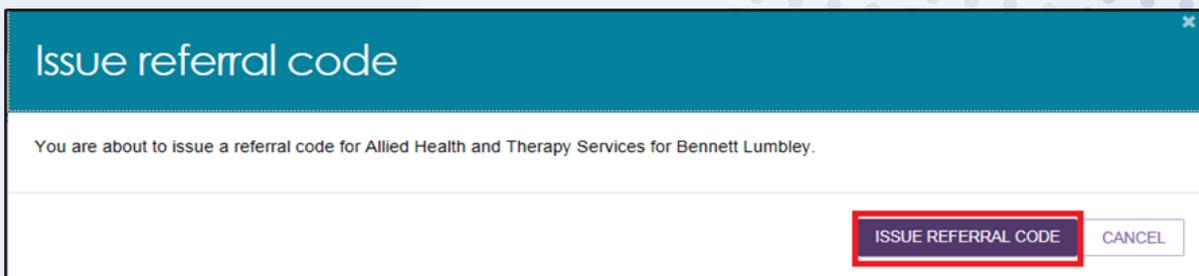
User Type: Assessor

● Not actioned

Recommended service frequency: 1 days per week

FIND PROVIDERS **ISSUE REFERRAL CODE** REMOVE THIS SERVICE RECOMMENDATION

2. A confirmation message will be displayed. Select **ISSUE REFERRAL CODE**.



Issue referral code

You are about to issue a referral code for Allied Health and Therapy Services for Bennett Lumbley.

ISSUE REFERRAL CODE CANCEL



3. You will receive a confirmation message that the referral code has been generated, and the details of the referral will appear under **the Services pending** section.

The referral code will be displayed on the referral list, and the referral code letter should be printed and provided to the client.

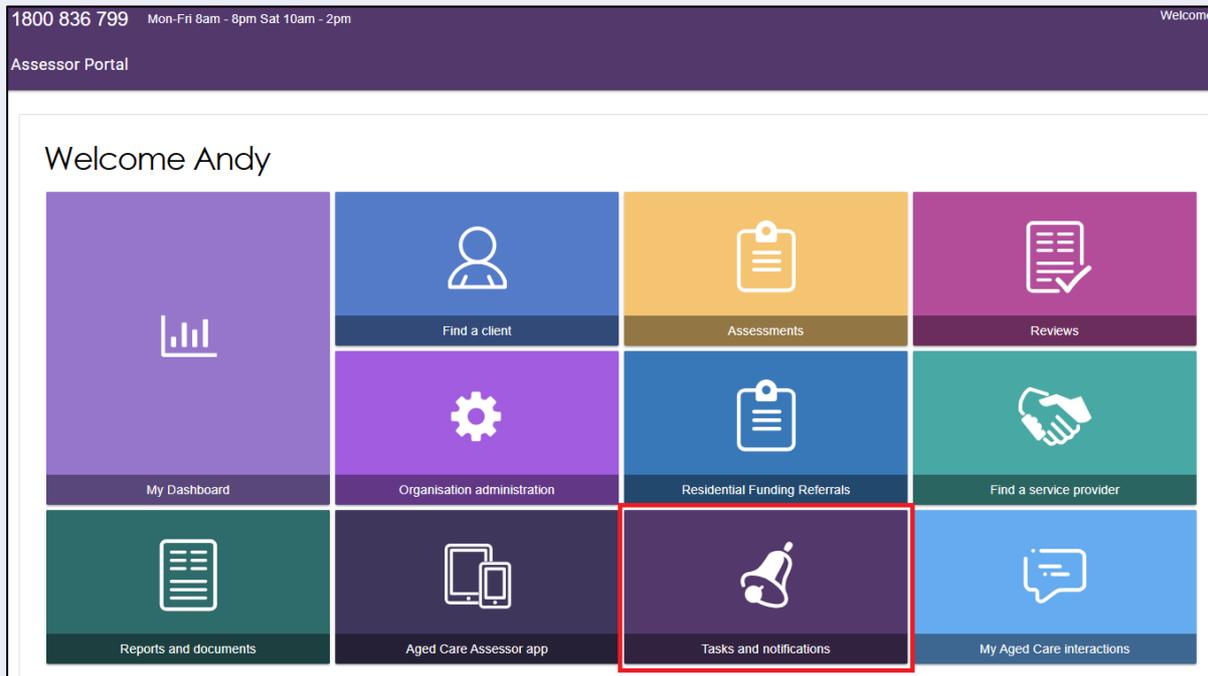
The screenshot shows the 'Personal Care' and 'Goods, equipment and assistive technology' sections. The 'Personal Care' section has a status of 'Low' and a 'Referral Code Generated' indicator. A manual referral code '1-40443353083' is displayed, along with a 'FIND PROVIDERS' button. The 'Goods, equipment and assistive technology' section also has a status of 'Low' and a 'Not actioned' indicator. It includes buttons for 'FIND PROVIDERS', 'ISSUE REFERRAL CODE', and 'REMOVE THIS SERVICE RECOMMENDATION'. Below these sections is a 'GENERATE REFERRAL CODE LETTER' button and a green confirmation message: 'Referral code successfully generated.' with a checkmark icon.

Select **GENERATE REFERRAL CODE LETTER** to print the referral code letter.

The letter is addressed to Mr Bennett Lumbley. It states that as a result of a recent assessment with Mary Connelly (Bay Assessment Services) and conversations with My Aged Care, referral codes are provided to access services. The letter explains that the referral code allows the recipient to visit and select their preferred service provider. It requests that the recipient quote the referral code to service providers to assist with discussions and determine the best service. The letter lists the recommended service as 'Allied Health and Therapy Services' with a referral code of '1-20445007616'. It provides information on how to find service providers via the My Aged Care Service Finder (www.myagedcare.gov.au) and a contact number (1800 200 422) for further queries.

Viewing Delegate decisions

1. Go to the **Tasks and notifications** tile in the assessor portal.



2. Go to the **Notifications** tab, and filter for your client if necessary. A Formal Delegate Decision notification will look like this:

The screenshot shows the 'Tasks and notifications' page. The 'Notifications' tab is selected. Below the tabs is a 'Filter by' section with input fields for 'Last name', 'First name', and 'Aged Care user ID'. There are buttons for 'ADVANCED SEARCH', 'CLEAR FILTERS', 'FILTER', and 'CLEAR'. Below the filter section is a table of notifications. The table has columns for 'Received', 'Category', 'Title/Description', 'Channel', 'Aged Care User ID', 'Client name', 'Select', and 'Remove'. The first notification is highlighted with a red box.

Received	Category	Title/Description	Channel	Aged Care User ID	Client name	Select	Remove
23 September 2024	Delegate Decision	Formal Delegate Decision A formal Delegate Decision has been made on the approved care type under the Aged Care Act 1997. Details are as follows - Aged Care User Id: AC78564994 Delegate Name: Africa Green Date decision made: 23/09/2024 06:06:00 PM Decision Status: Care Approved Activity Id: 2-156954311308 Go to: Match and Refer		AC78564994	THORBURN Rochelle	<input type="checkbox"/>	



- Alternatively, go to the Assessments tile of the assessor portal home page. You will be able to see that the Delegate has made a decision in the **Current assessments** tab. The client's assessment will appear under **Delegate decision complete** section in card view, or with a status of **Delegate Decision Complete** in list view.

Current assessments

Current assessments | Recent assessments

CARD | LIST

Filter by

Delegate decision complete

Nova BOND

FRANKLIN, ACT, 2913
Aged care user ID: AC25972829
Date accepted: 12 November 2019

Comprehensive

✓ Delegate Decision Complete | Low

November BOND

FRANKLIN, ACT, 2913
Aged care user ID: AC42520312
Date accepted: 11 November 2019

Comprehensive

✓ Delegate Decision Complete | Low

Referring for Home Care Package services

- Select the **Assessments** tile from the assessor portal home screen.

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

Assessor Portal

Welcome Andy

My Dashboard | Find a client | **Assessments** | Reviews

Organisation administration | Residential Funding Referrals | Find a service provider

Reports and documents | Aged Care Assessor app | Tasks and notifications | My Aged Care interactions



2. Select a client within your **Current assessments** tab and then go to the client's support plan.

Current assessments

Current assessments | Recent assessments

Filter by

Sort by: Last Name | in order of: Alphabetical (A-Z)

Current sort order is Priority: High to Low

Delegate decision complete

Ash APPI

FRANKLIN, ACT, 2913
Aged Care ID: AC41658709
Date referred: 23 May 2017
Date accepted: 23 May 2017

Comprehensive | Assessment

Delegate Decision Complete | Medium

Ash APPI

Aged 96 (15 May 1921), Male

Referred from Aged Care Gateway on 23 May 2017
Accepted on 23 May 2017

Assessment reason
the client has needs that exceed a basic support programme

Client story
No client story was recorded

Preferences
No preference was recorded

Latest screening: 23 May 2017
Comprehensive assessment: 17 July 2017
Support plan: 17 July 2017

VIEW FULL CLIENT RECORD | VIEW PDF OF CLIENT RECORD

Alternatively, you can also go directly to the client's support plan from the **Notifications** tab by selecting on the **Match and Refer** link.

Tasks and notifications

You have report(s) that are ready to be downloaded. To download, go to [Reports page](#).

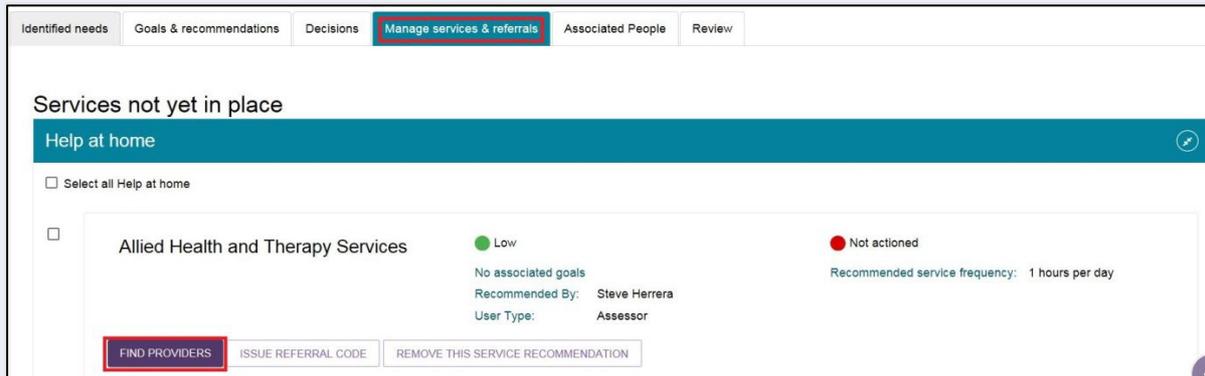
Tasks | **Notifications** | Maximum HCP wait times

Filter by

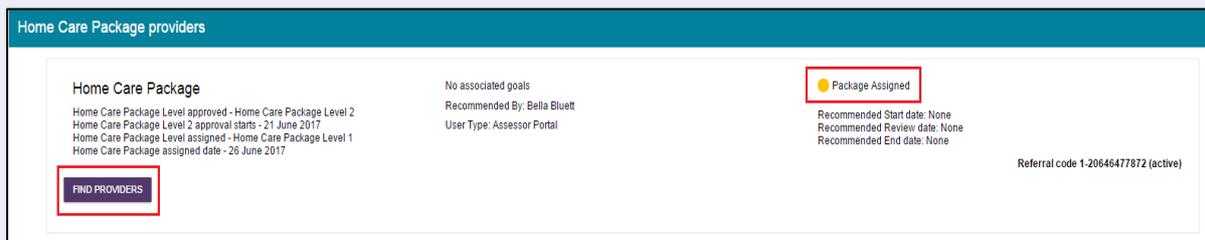
Select all

Received	Category	Title/Description	Aged Care User ID	Client name	Select	Remove
20/02/2019	Delegate Decision	<p>Formal Delegate Decision</p> <p>A formal Delegate Decision has been made on the approved care type under the Aged Care Act 1997. Details are as follows - Aged Care User Id: AC80654205 Delegate Name: Steve Herrera Date decision made: 20/02/2019 10:31:13 AM Decision Status: Care Approved Activity Id: 1-55846407745</p> <p>Go to: Match and Refer</p>	AC80654205	BISHOP Mercedes	<input type="checkbox"/>	

3. Select the **Manage services & referrals** tab. The services added in the **Goals and recommendations** tab of the support plan will be displayed under **Services not yet in place**. Select **FIND PROVIDERS** to search and create electronic referrals for services.



For Home Care Package recommendations, you will be able to send electronic referrals for service when the client has been assigned a package from the national priority system and the status is **Package Assigned**.



Managing rejected service referrals

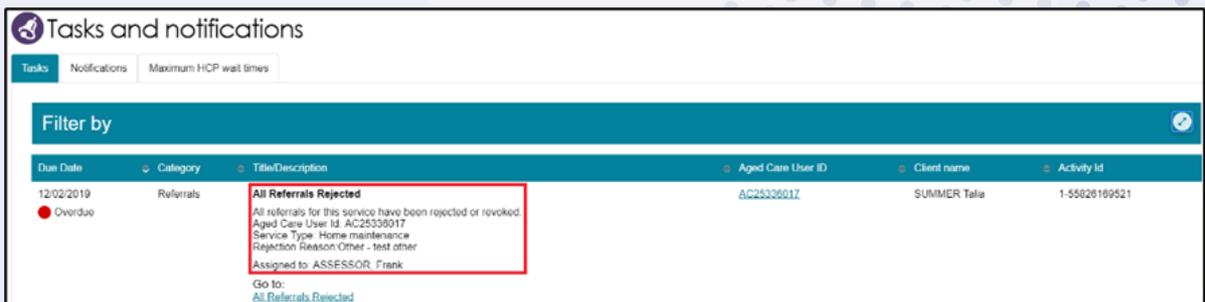
To connect clients to appropriate service providers and ensure consistency for clients, any referrals sent by you will be returned to you for actioning if they are rejected and there are no referral preferences for the client remaining.

Where a referral for service is rejected, and it is the client's final preference, assessors will:

- Receive a notification that the referral was rejected (an All Referrals Rejected task); and
- Be able to reissue referrals to different providers or accept a provider's offer to waitlist, based on discussion with the client.

To follow up a rejected referral, follow the steps below.

1. Navigate to the **Tasks** tab in the **Tasks and notifications** section and select the **All Referrals Rejected** link to navigate directly to the client's support plan or the Aged Care User ID link to navigate to the client record.



Alternatively, if you know the client's name you can view all tasks and notifications for an individual client in the **Tasks and Notifications** tab in the client record.

Type	Due Date	Received Date	Category	Title/Description	Activity Id	Portal	Outlet
Notification		11/02/2019	Referrals	New Referral You have a new referral from My Aged Care. Referral created at: 11/02/2019 14:29 Aged Care User Id: AC25336017 Outlet Name: Aged Care Outlet 1 Service Type: Allied Health and Therapy Services Priority: Medium	1-55826166169	Service Provider Portal	Aged Care Outlet 1, Aged Care Service
Task	12/02/2019	11/02/2019	Referrals	All Referrals Rejected All referrals for this service have been rejected or revoked. Aged Care User Id: AC25336017 Service Type: Home maintenance Rejection Reason Other - test other Assigned to: ASSESSOR, Frank Go to: All Referrals Rejected	1-55826166521	Assessor Portal	Kingston Aged Care Assessment Service, Corporation of Health and Human Services

- If navigating directly from the notification, the **Manage services & referrals** tab in the client's support plan will open, where the rejected service type will be displayed with **Rejected Referral/s** on the recommendation.

Services not yet in place

Help at home

Select all Help at home

Allied Health and Therapy Services

● Low

No associated goals

Recommended By: Steve Herrera

User Type: Assessor

REFERRAL HISTORY

● Rejected Referrals

Recommended service frequency: 1 hours per day

FIND PROVIDERS | ISSUE REFERRAL CODE | REMOVE THIS SERVICE RECOMMENDATION

You will also be able to see the status of any other of the client's referrals.

- Navigate to the **Manage services & referrals** tab to see the status of the client's referrals.

Services not yet in place

Help at home

Select all Help at home

Allied Health and Therapy Services

● Low

No associated goals

Recommended By: Steve Herrera

User Type: Assessor

REFERRAL HISTORY

● Rejected Referral/s

Recommended service frequency: 1 hours per day

FIND PROVIDERS | ISSUE REFERRAL CODE | REMOVE THIS SERVICE RECOMMENDATION

For Rejected Referrals, select **Referral history** to see the further detail about the reason the referral was rejected.

- You can now send referrals to new providers or generate a referral code for the client, following the steps described earlier in this guide. Based on the referral rejection reason, you may be required to add further information to a client's referral, or need to discuss alternative options with the client prior to issuing another referral.