



## Assessor Portal User Guide 9 - Tasks and Notifications

A **task** is an activity that an aged care needs assessor (assessor) needs to action (finalise/close).

A **notification** is an activity that informs the assessor of an event. The assessor may need to complete an action as a result of the notification.

The My Aged Care assessor portal (assessor portal) contains notifications and prompts users to action tasks. Preferences can also be configured by your outlet’s Administrator to enable an email alert to be sent for tasks and notifications. You can also manage your task and notification preferences.

All staff with access to the assessor portal will have access to view tasks and notifications.

You will receive a notification when a client’s status has changed to ‘Deceased’. You should review the client record to see if further action is required, for example you may need to close any active referrals or assessment records for the client.

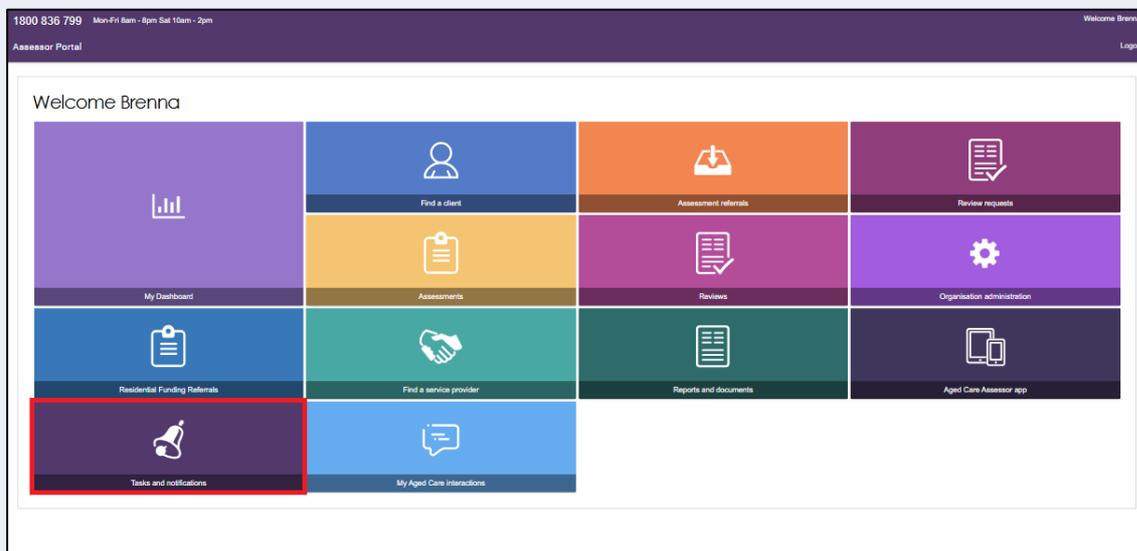
This user guide contains the following topics:

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## Viewing and actioning tasks

Assessors will be able to see all tasks and notifications for clients in the tasks and notifications tab, however service providers will only be able to see tasks and notifications that are associated to their outlet and for clients they are providing services to.

1. From the assessor portal homepage select **Tasks and notifications**.



2. The **Tasks** tab will open by default.

If you are accessing the assessor portal as clinical aged care needs assessor (clinical assessor) your Tasks and Notifications tab will appear like this, with tabs labelled as Tasks, Notifications, and Maximum HCP wait times:

The screenshot shows the 'Tasks and notifications' page. At the top, there is a header with a magnifying glass icon and the text 'Tasks and notifications'. Below the header are three tabs: 'Tasks', 'Notifications', and 'Maximum HCP wait times'. The 'Tasks' tab is selected. Below the tabs is a message: 'All fields marked with an asterisk (\*) must be completed before submission'. Below the message is a 'Filter by' button. Below the filter button is a dropdown menu for 'Outlet' with the value 'Aged Care Inc - Outlet 1' and a 'GO' button. Below the dropdown menu is a table with the following columns: 'Due Date', 'Category', 'Title/Description', 'Aged Care User ID', 'Client name', and 'Activity Id'. The table contains one row of data:

Due Date	Category	Title/Description	Aged Care User ID	Client name	Activity Id
19/02/2021	Referrals	<b>All Referrals Rejected</b> All referrals for this service have been rejected or revoked. Aged Care User Id: AC94703113 Service Type: Residential Respite High Care Rejection Reason: Referral made in error Assigned to: LAPA, Levi Go to: <a href="#">All Referrals Rejected</a>	AC94703113	JUICE Kale	1-75934633995

If you are accessing the assessor portal as a clinical assessor team lead, your Tasks and Notifications tab will appear like this, with tabs labelled as Tasks, Notifications, HCP Notifications, and Maximum HCP wait times:



Tasks and notifications

Tasks Notifications HCP Notifications Maximum HCP wait times

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

Filter by

Outlet: \*  
Aged Care Inc - Outlet 1 GO

Due Date	Category	Title/Description	Aged Care User ID	Client name	Activity Id
19/02/2021 ● Overdue	Referrals	<b>All Referrals Rejected</b> All referrals for this service have been rejected or revoked. Aged Care User Id: AC94703113 Service Type: Residential Respite High Care Rejection Reason: Referral made in error Assigned to: LAPA, Levi	<a href="#">AC94703113</a>	JUICE Kale	1-75934633995

In the Tasks tab, you will be able to view all tasks that are relevant to your role.

You can sort tasks by:

- Due date
- Category
- Title/Description
- Aged Care User ID
- Client name
- Activity ID

! Certain types of tasks can be marked as important for your outlet by your outlet administrator.

When these tasks are created, they will be displayed with a visual indicator. The [Managing task and notification preferences](#) section in this guide explains how to set tasks as important.

Due Date	Category	Title/Description	Aged Care User ID	Client name	Activity Id
30/06/2017 ● Important	Referrals	<b>All Referrals Rejected</b> All referrals for this service have been rejected. Aged Care User Id: AC51687283 Service Type: Allied Health and Therapy Services Rejection Reason: Referral made in error Assigned to: BL_AJ396956 <a href="#">All Referrals Rejected</a>	<a href="#">AC51687283</a>	SMITH John	1-20766316044

Alternatively, if you want to see all tasks and notifications for a single client, navigate to the **Tasks and Notifications** tab in the client's record to see all relevant tasks and notifications for that client.

# Ash JETSON

Male, 95 years old, 10 October 1921, AC86732492  
NICHE Unit 13, 17 WIMMERA Street HARRISON, ACT, 2914

## Tasks and notifications

REFER THIS CLIENT FOR ASSESSMENT

VIEW PDF OF CLIENT RECORD

START SUPPORT PLAN REVIEW

Client Details

Approvals

Plans

Attachments

Services

My Aged Care interactions

Notes

Tasks and Notifications

### Filter by

Type	Due Date	Received Date	Category	Title/Description	Activity Id	Portal	Outlet
Notification	05/07/2017		Delegate Decision	<b>Formal Delegate Decision</b> 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: AC86732492 Delegate Name: Bella Bluett Date decision made: 07/05/2017 09:29:21 Decision Status: Care Approved Assigned to: BL_AJ396956 <a href="#">Match and Refer</a>	1-20789565042	Assessor Portal	Golden Assessment Outlet, Golden Glow Corporation (NT) Pty Ltd
Notification	05/07/2017		Delegate Decision	<b>Delegate Decision</b> An assessment has been submitted for Delegate Decision. Details are as follows - Aged Care User Id: AC86732492 Assessor: BL_AJ396956	1-20789570051	Assessor Portal	

3. You can search for specific tasks using the filter options or using custom filters in **Advanced Search**. Select the arrows to the right to expand or collapse the filter options.

Tasks Notifications

Filter by

Last name: \_\_\_\_\_ First name: \_\_\_\_\_ Aged Care User ID: \_\_\_\_\_

ADVANCED SEARCH CLEAR FILTERS

FILTER CLEAR

To apply custom filters, select **ADVANCED SEARCH** and choose filters from the drop-down menu and select **ADD FILTER** for each filter you want to apply.



## Search tasks

### Tasks

Choose an item.

- Activity ID
- Aged Care User ID
- Category
- Date received
- Due date
- First name
- Last name
- Marked as important
- Overdue tasks
- Role
- Title

ADD FILTER SAVE FILTER CLEAR FILTER

FILTER CANCEL

4. The hyperlink under the task description will take you directly to the individual record and the section of the portal where you can action the task. Alternatively, you can navigate to the client's record by selecting the client's Aged Care ID from the tasks list.

Filter by					
Due Date	Category	Title/Description	Aged Care User ID	Client name	Activity Id
30/06/2017 ● Overdue	Referrals	<p><b>All Referrals Rejected</b></p> <p>All referrals for this service have been rejected.            Aged Care User Id: AC51687283            Service Type: Allied Health and Therapy Services            Rejection Reason: Referral made in error            Assigned to: BL AJ396956</p> <p><a href="#">All Referrals Rejected</a></p>	<a href="#">AC51687283</a>	SMITH John	1-20766316044



For example, selecting the link in an **All Referrals Rejected** task will take you directly to the client's support plan where you can review the rejected referral and issue any referrals required.

John Smith support plan and services

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

Services not yet in place

Help at home

**Allied Health and Therapy Services**

● Medium

No associated goals

Recommended By: Bella Bluett

User Type: Assessor Portal

REFERRAL HISTORY

● Rejected Referral/s

Recommended Start date: None

Recommended Review date: None

Recommended End date: None

FIND PROVIDERS | ISSUE REFERRAL CODE

Once the action required from the task has been completed, the task will be removed from your task list.

Certain tasks may close automatically once an action has been taken by another My Aged Care user (e.g. when a service provider accepts a referral that has triggered a task for assessor to follow up, the task is automatically closed in the assessor portal).

! If you believe you have completed a task and it has not been removed from your portal, please call the My Aged Care Service Provider and assessor helpline on 1800 836 799 who will be able to assist in completing the task.

5. Assessors can also change the client's status to deceased by opening the **Client details** tab and selecting **NOTIFY MY AGED CARE OF A DEATH**.

Home | Joe BOISCLAIR

Mr Joe BOISCLAIR

Female, 80 years old, 19 December 1939, AC24897842  
Serenity, 444 4 STUART HIGHWAY KILGARIFF, NT, 0873

Primary contact: Joe Boisclair (self) - 02 2785 5745

No representatives or relationships recorded

Client details

REFER THIS CLIENT FOR ASSESSMENT | VIEW PDF OF CLIENT RECORD | START SUPPORT PLAN REVIEW

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

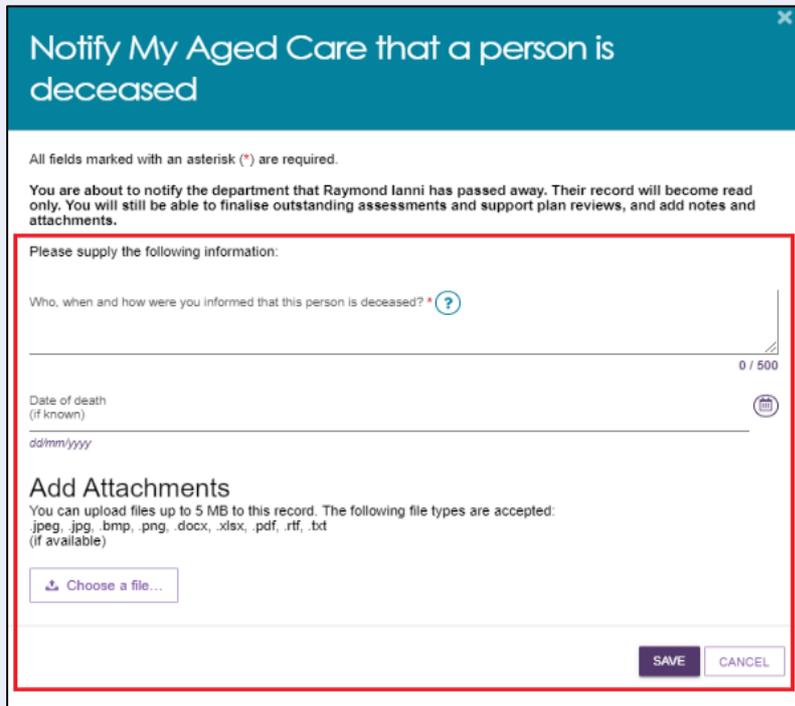
About Joe

NOTIFY MY AGED CARE OF A DEATH



When **NOTIFY MY AGED CARE OF A DEATH** is selected you will be taken to **Notify My Aged Care that person is deceased** screen where you will have to add the following details:

- Who, when and how you were informed that this person is deceased? E.g. “Mrs. Smith rang to inform us that Mr. Smith has passed away on Saturday”
- Date of death (if known)
- Add Attachments, as available (e.g. Death Certificate, Hospital Discharge documents).



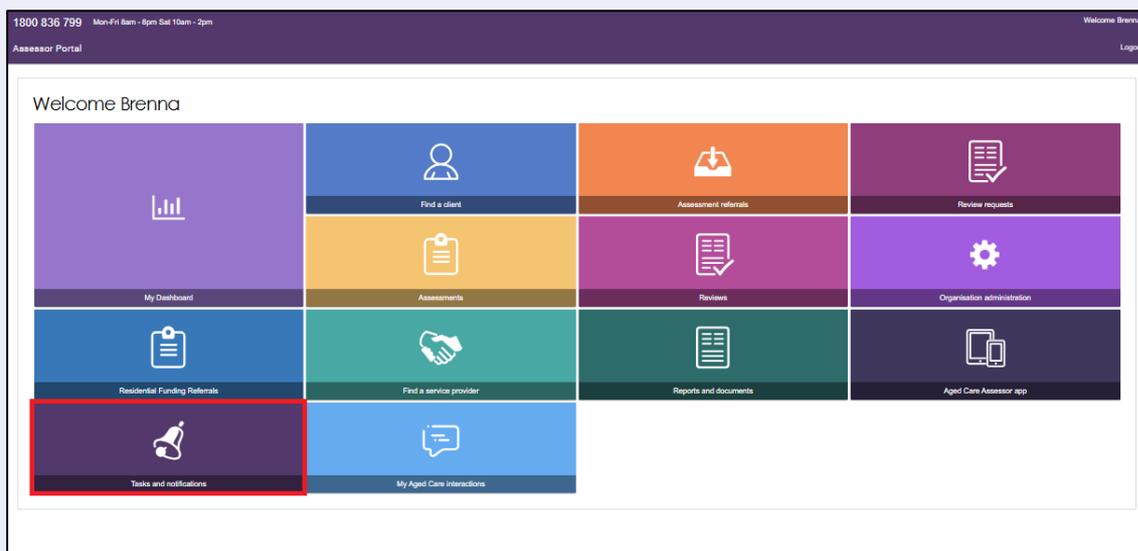
The screenshot shows a web form titled "Notify My Aged Care that a person is deceased". At the top, it states "All fields marked with an asterisk (\*) are required." Below this, a message reads: "You are about to notify the department that Raymond Ianni has passed away. Their record will become read only. You will still be able to finalise outstanding assessments and support plan reviews, and add notes and attachments." The form contains three main sections: 1. A text input field for "Who, when and how were you informed that this person is deceased?" with a red asterisk and a help icon, and a character count of "0 / 500". 2. A date input field for "Date of death (if known)" with a calendar icon and a placeholder "dd/mm/yyyy". 3. An "Add Attachments" section with the text "You can upload files up to 5 MB to this record. The following file types are accepted: .jpeg, .jpg, .bmp, .png, .docx, .xlsx, .pdf, .rtf, .txt (if available)" and a "Choose a file..." button. At the bottom right, there are "SAVE" and "CANCEL" buttons.

When the client status is changed to deceased, if they have an in-progress assessment, a notification will be sent to the associated assessor and provider advising them to close or finalise the in-progress tasks.

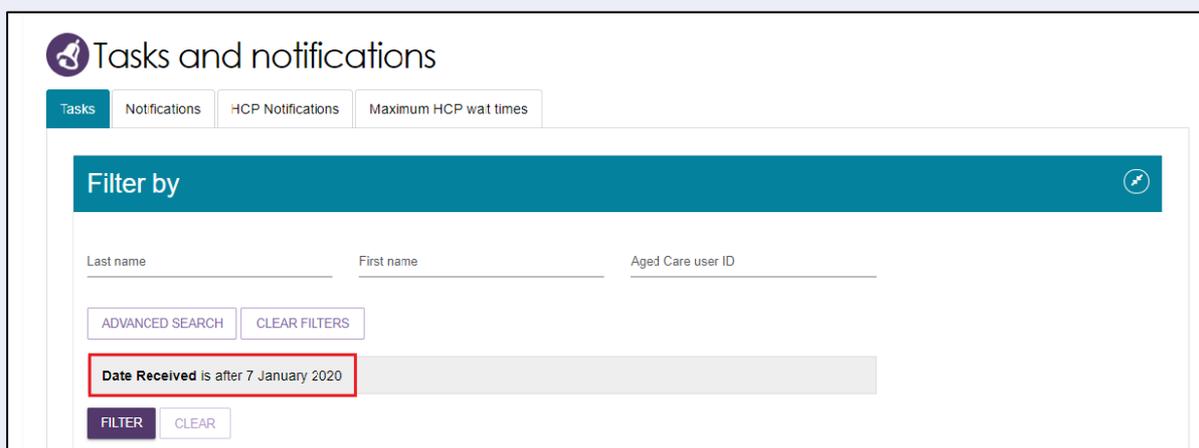
## Viewing notifications

Assessors will be able to see all tasks and notifications for clients, however service providers will only be able to see tasks and notifications that are associated to their outlet and for clients they are providing services to.

1. From the assessor portal homepage select **Tasks and notifications** and select the **Notifications** tab.



2. In the **Notifications** tab, you will be able to view notifications from the last 30 days that are relevant to your role. The earliest date that the notifications are displayed from is visible under the filter options. Any notifications older than 30 days will be removed and will no longer be visible in the portal.



Alternatively, if you want to see all tasks and notifications for a single client, navigate to the **Tasks and Notifications** tab in the client's record to see all relevant tasks and notifications for that client.

## Ash JETSON

Male, 95 years old, 10 October 1921, AC86732492  
NICHE Unit 13, 17 WIMMERA Street HARRISON, ACT, 2914

### Tasks and notifications

[REFER THIS CLIENT FOR ASSESSMENT](#)

[VIEW PDF OF CLIENT RECORD](#)

[START SUPPORT PLAN REVIEW](#)

Client Details

Approvals

Plans

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Services

My Aged Care interactions

Notes

**Tasks and Notifications**

#### Filter by

Type	Due Date	Received Date	Category	Title/Description	Activity Id	Portal	Outlet
Notification		05/07/2017	Delegate Decision	<b>Formal Delegate Decision</b> 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: AC86732492 Delegate Name: Bella Bluett Date decision made: 07/05/2017 09:29:21 Decision Status: Care Approved Assigned to: BL_AJ396956 <a href="#">Match and Refer</a>	1-20789565042	Assessor Portal	Golden Assessment Outlet, Golden Glow Corporation (NT) Pty Ltd
Notification		05/07/2017	Delegate Decision	<b>Delegate Decision</b> An assessment has been submitted for Delegate Decision. Details are as follows - Aged Care User Id: AC86732492 Assessor: BL_AJ396956	1-20789570051	Assessor Portal	

### 3. In the **Notifications** tab, you can sort notifications by:

- Received Date
- Category
- Title/Description
- Aged Care User ID
- Client name
- Client Correspondence

Received	Category	Title/Description	Aged Care User ID	Client name	Select	Remove
04/07/2017	Delegate Decision	<b>Delegate Decision</b> An assessment has been submitted for Delegate Decision. Details are as follows - Aged Care User Id: AC36926350 Assessor: BL_AJ396956 Activity Id: 1-9JQ718Y	<a href="#">AC54467147</a>	WALTON Ash	<input type="checkbox"/>	
03/07/2017	Delegate Decision	<b>Formal Delegate Decision</b> 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: AC51547305 Delegate Name: Bella Bluett Date decision made: 07/03/2017 09:55:00 Decision Status: Care Approved Activity Id: 1-9JIBN4V <a href="#">Match and Refer</a>	<a href="#">AC51547305</a>	JORDAN Ash	<input type="checkbox"/>	
30/06/2017	Delegate Decision	<b>Correction of Care Approval</b> A request for correction to care approval/s has been submitted. Details are as follows - Aged Care User Id: AC65116550 Correction Details: Update Residential Permanent Activity Id: 1-9JIBM05	<a href="#">AC65116550</a>	SIMPSON Sunny	<input type="checkbox"/>	

Home Care notifications will display in the **Notifications** tab if enabled in the client's support plan or on the **Approvals** tab in the client record.

Further information on selecting to receive this notification can be found in the [My Aged Care – Assessor Portal User Guide 13 – Management of Home Care Packages](#).

**!** As with tasks, certain types of notifications can be marked as important for your outlet by your outlet administrator.

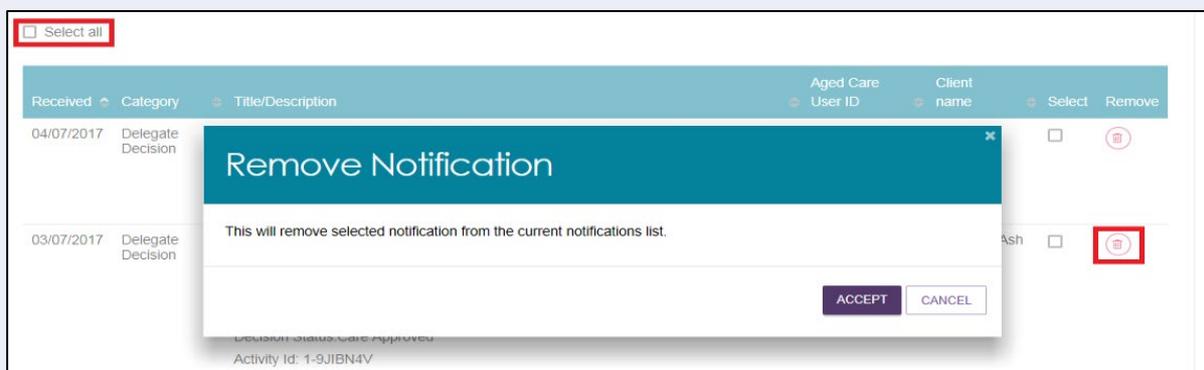


When these notifications are created, they will be displayed with a visual indicator.

The [Managing task and notification preferences](#) section in this guide explains how to set notifications as important.

Received	Category	Title/Description	Aged Care User ID	Client name	Select	Remove
28/06/2017	Client Correspondence	<b>Home care correspondence</b> Client is now seeking home care services Your client Andy Jorgensen (Aged Care User ID AC48007322), is now seeking home care services. Full details are contained in the client letter which will typically be available within 24 hours. The letter can be accessed from the 'Attachments' tab in their client record. Activity Id: 1-9JE2VIG <a href="#">Correspondence</a>	<a href="#">AC48007322</a>	JORGENSEN Andy	<input type="checkbox"/>	

4. You can also remove individual or bulk notifications from your portal by selecting the Remove icon or **Select all** checkbox.



Select all

Received	Category	Title/Description	Aged Care User ID	Client name	Select	Remove
04/07/2017	Delegate Decision				<input type="checkbox"/>	
03/07/2017	Delegate Decision				<input type="checkbox"/>	

**Remove Notification**

This will remove selected notification from the current notifications list.

ACCEPT CANCEL

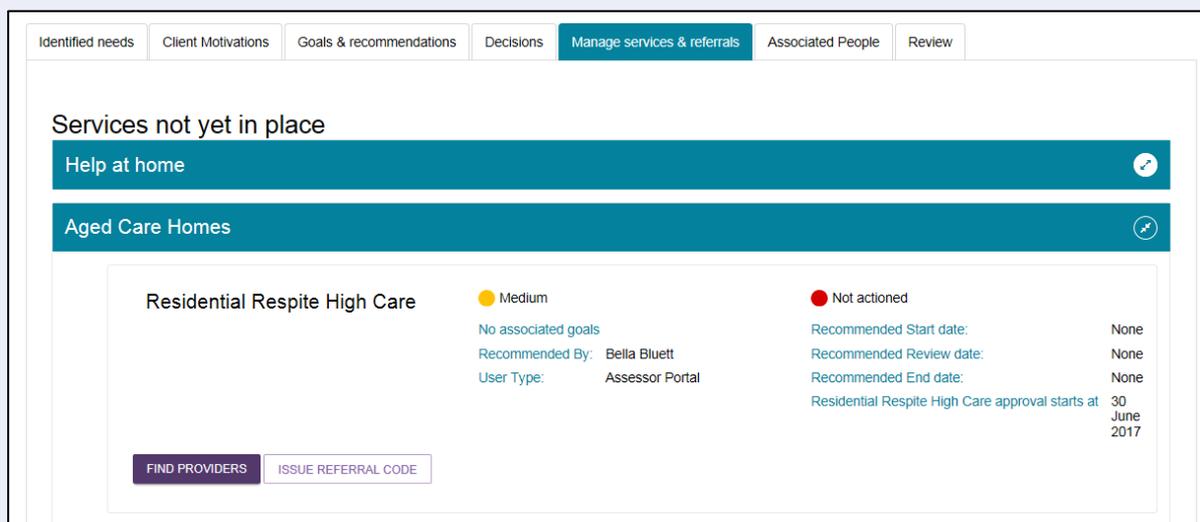
- You can search for specific notifications using the filter options or using custom filters in Advanced Search. Select the arrows to the right to expand or collapse the filter options.

To apply custom filters, select **ADVANCED SEARCH** and choose filters from the drop-down menu and select **ADD FILTER** for each filter you want to apply.

- The hyperlink under the notification description will take you directly to the individual record and the section of the portal where you can view more information about the notification or complete any action that may be required.

Received	Category	Title/Description	Aged Care User ID	Client name	Select	Remove
05/07/2017	Delegate Decision	<p><b>Formal Delegate Decision</b></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: AC86732492            Delegate Name: Bella Bluett            Date decision made: 07/05/2017 09:29:21            Decision Status: Care Approved</p> <p>Activity Id: 1-9JTKJ1U</p> <p><a href="#">Match and Refer</a></p>	<a href="#">AC86732492</a>	JETSON Ash	<input type="checkbox"/>	

For example, selecting the link in a **Formal Delegate Decision** notification will take you directly to the client's support plan where you can match and refer for the recently approved care type.

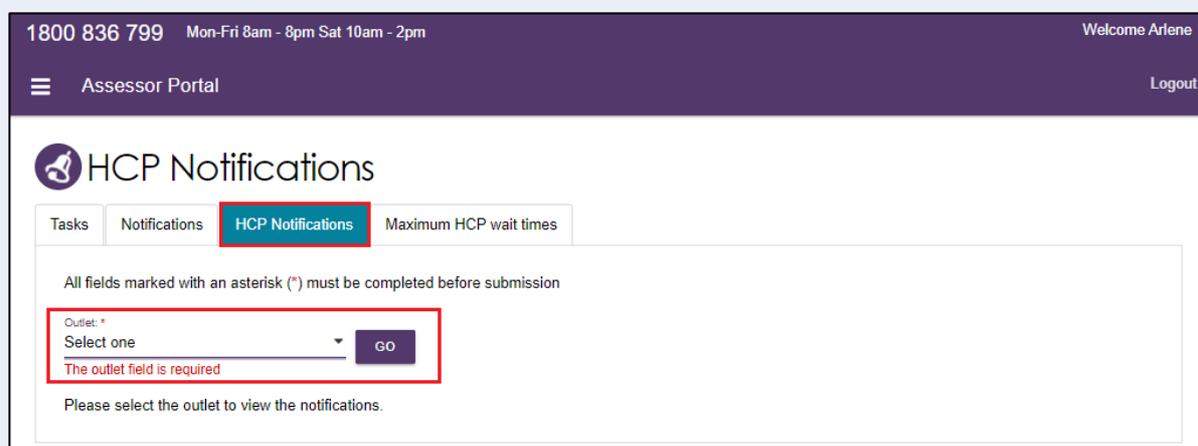


## Viewing and reassigning Home Care Package (HCP) notifications

You must be assigned in the team leader role to view which assessor or delegate is currently receiving the client's Home Care Package correspondence notifications.

You will also have the ability to reassign a client or an individual or make bulk reassignment changes to a different assessor or delegate within an outlet.

1. In the **Tasks and Notifications** tab select **HCP Notifications** tab. If you manage more than one outlet you may choose which outlet to view from the dropdown.



Once you have chosen the outlet to view you will see the following details:

- Last Name
- First Name
- Aged Care User ID
- Locality
- Who receives the notification (First name, Last name)



The last column is a select tick box which allows the team lead to complete individual or bulk reassignments:

The screenshot shows the 'HCP Notifications' interface. At the top, there are tabs for 'Tasks', 'Notifications', 'HCP Notifications', and 'Maximum HCP wait times'. Below the tabs, there is a message: 'All fields marked with an asterisk (\*) must be completed before submission'. There is an 'Outlet:' dropdown menu set to 'Outlet B' and a 'GO' button. Below that, it says 'With 3 selected' and a 'REASSIGN' button. On the right, it says '1 to 10 out of 203 matching results'. The main part of the interface is a table with the following columns: 'Last name', 'First name', 'Aged care user id', 'Locality', 'Who receives the notification', and 'Select'. The table contains 10 rows of data. The first three rows have checkboxes in the 'Select' column that are checked, and they are highlighted with a red box. The remaining seven rows have unchecked checkboxes. At the bottom of the table, there are navigation buttons: 'PREVIOUS', '1', '2', '3', '4', '5', '6', '...', '19', '20', '21', and 'NEXT'.

Last name	First name	Aged care user id	Locality	Who receives the notification	Select
IANNI	Frederick	AC89671622	ALICE SPRINGS, NT, 0872	Marion Pollock	<input checked="" type="checkbox"/>
KEARNY	Richard	AC37054590	ALICE SPRING, NT, 0870	Henry Monfore	<input checked="" type="checkbox"/>
BOISCLAIR	Floyd	AC90979964	ALICE SPRINGS, NT, 0870	Henry Monfore	<input checked="" type="checkbox"/>
BOISCLAIR	Leonard	AC69145357	ALICE SPRINGS, NT, 0870	Henry Monfore	<input type="checkbox"/>
BOISCLAIR	Warren	AC75244160	ALICE SPRINGS, NT, 0870	Will Damion	<input type="checkbox"/>
BOUY	Frederick	AC91289116	ALICE SPRINGS, NT, 0870	Henry Monfore	<input type="checkbox"/>
CATRONE	Sam	AC96320320	ALICE SPRINGS, NT, 0870	Henry Monfore	<input type="checkbox"/>
CATRONE	Walter	AC99643819	ALICE SPRINGS, NT, 0870	Henry Monfore	<input type="checkbox"/>
CONLAN	Wesley	AC99788341	ALICE SPRINGS, NT, 0870	Henry Monfore	<input type="checkbox"/>
CRAYFORD	Alvin	AC54911813	ALICE SPRINGS, NT, 0870	Henry Monfore	<input type="checkbox"/>

- By Clicking the **REASSIGN** button, the **Re-assign Home Care correspondence notifications** pop up will be displayed where you can select the new recipient and finalise by clicking the **SAVE** button.

The screenshot shows a pop-up window titled 'Re-assign Home Care correspondence notifications'. At the top right, there is a close button (X). Below the title, there is a message: 'All fields marked with an asterisk (\*) are required.' Below that, it says 'Please select Home Care correspondence notification recipient'. There is a list of radio buttons with the following names: 'Alfred Catrone', 'Gerda Chubb', 'Will Damion', 'Harold Decarvalho', 'Sidney Fereday', 'Halle Hamilton', and 'Levi Hills'. The 'Alfred Catrone' radio button is selected. At the bottom right, there are two buttons: 'SAVE' and 'CANCEL'.

## Managing task and notification preferences

You must be assigned an administrator role to manage task and notification preferences for your organisation or outlet.

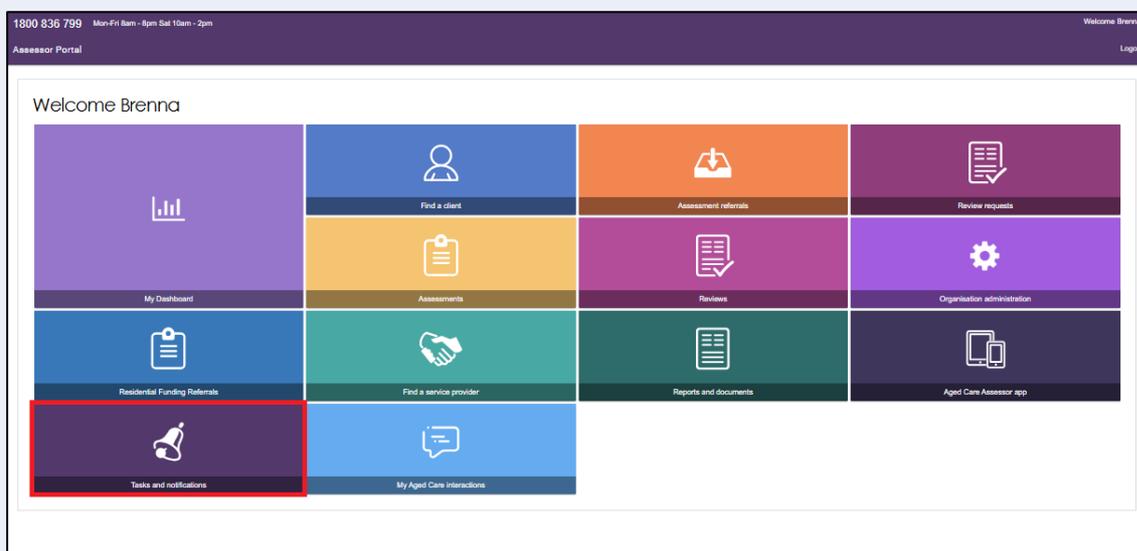
If you need to add this role to your user account, please see your organisation administrator.

As an administrator, you will be able to:

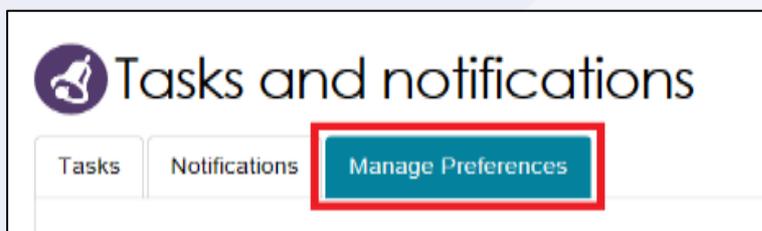
- edit email address and email frequency for new task and notifications
- turn off visibility of notifications in the assessor portal
- view description of each task and notification, including which user types will be able to see them
- edit individual task and notification preferences
- mark a task or notification as important to your outlet.

These settings will affect all staff assigned to your outlet, so please ensure all staff are made aware of any changes you make.

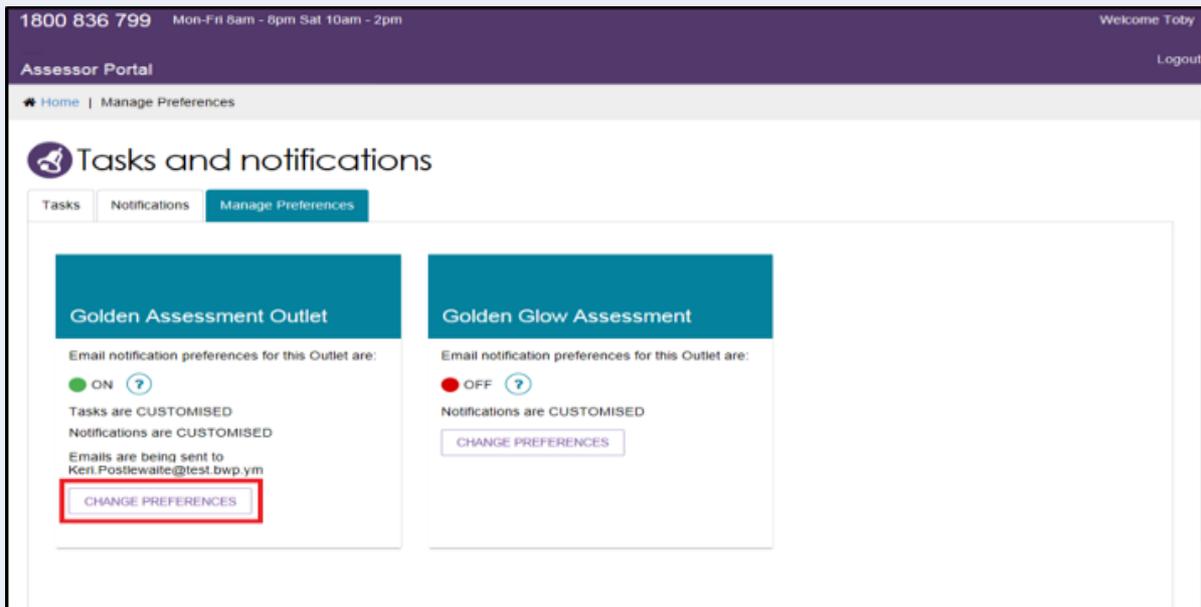
### 1. From the assessor portal homepage select **Tasks and notifications**.



### 2. Select the **Manage Preferences** tab.



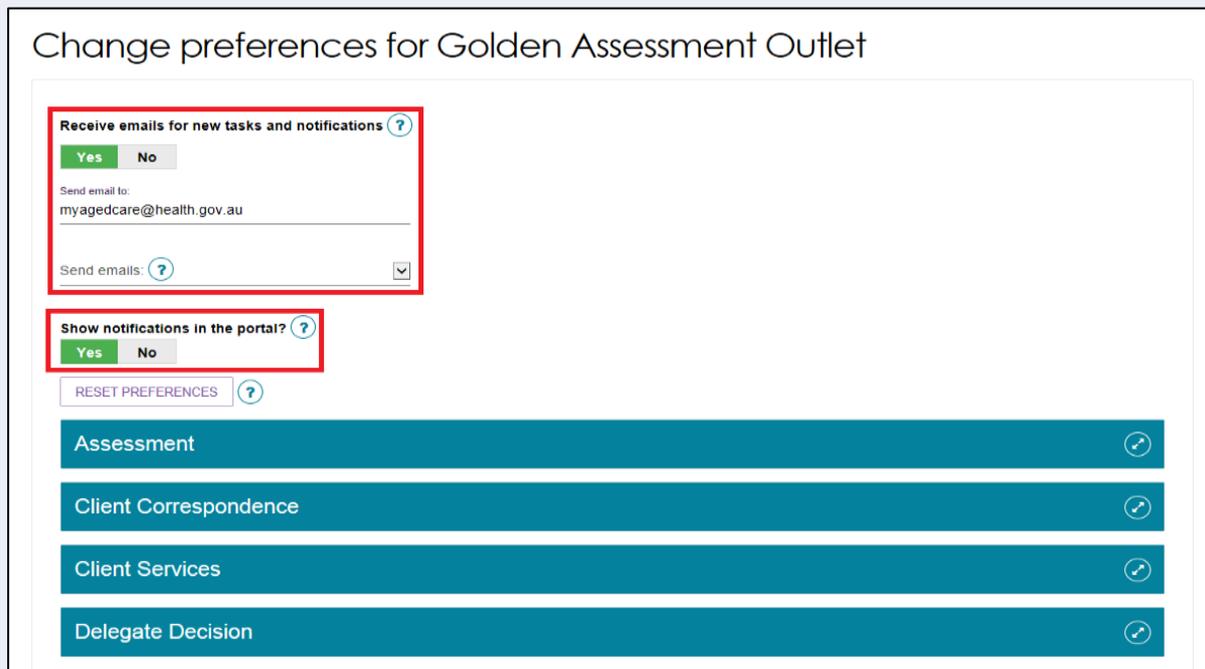
- If you are the administrator for your organisation, you will be able to select which outlet you want to configure task and notification preferences for. Select **CHANGE PREFERENCES**. If you are the administrator for your outlet, you will only be able to see your outlet's preferences.



- The preferences page for the outlet will open. At the top of the page, you can configure the overall preferences for email preference, email address, email frequency and notification visibility in the portal.

You can choose to hide all notifications, or hide individual notification types for the outlet. Selecting **No** to hide all means that no notifications for the outlet will be visible to staff associated with the outlet.

Selecting **No** for an individual notification type means that only notifications of that type will be hidden for staff associated with the outlet.



- Tasks and notifications are sorted by category. Select the Expand (double arrow) icon to expand/collapse each category.

The screenshot displays a list of categories: Assessment, Client Correspondence, and Client Services. The Client Services category is expanded, revealing two items:

- Task: Overdue Referral**: A referral has not been accepted or rejected within required timeframes. Please review and action this referral as soon as possible. This task is seen by: Assessor Team Lead. Configuration options include:
  - Send an email when this type of task is received? (Yes/No buttons)
  - Send the email: Immediate (dropdown menu)
  - Show this type of task as important? (Yes/No buttons)
- Notification: Client Identity and Info**: A client has been deactivated in the My Aged Care system. Please review and close/finalise any active assessment records. This notification is seen by: Assessor. Configuration options include:
  - Send an email when this type of notification is received? (Yes/No buttons)

For each task or notification you will be able to view:

- Type (e.g. task or notification)
- Title and brief description of the why the task or notification has triggered
- User type who can view or action the task or notification.

For each task or notification you will be able to individually configure:

- Whether to send an email when a task or notification generates
- Frequency of email notification, if enabled
- Whether to display a task or notification as important in the portal.

**!** If you choose to mark a task or notification as important, staff within your outlet who can view that particular task/notification will see a visual indicator in their portal.

Received	Category	Title/Description	Aged Care User ID	Client name	Select	Remove
28/06/2017	Client Correspondence	<b>Home care correspondence</b> Client is now seeking home care services Your client Andy Jorgensen (Aged Care User ID AC48007322), is now seeking home care services. Full details are contained in the client letter which will typically be available within 24 hours. The letter can be accessed from the 'Attachments' tab in their client record. Activity Id: 1-9JE2VIG <a href="#">Correspondence</a>	<a href="#">AC48007322</a>	JORGENSEN Andy	<input type="checkbox"/>	

6. Select **SAVE** when all changes have been made. You can reset the preferences by selecting **RESET PREFERENCES** at the top of the page.

Selecting the arrow in the bottom right of the screen will automatically take you to the top of the page.

Assessor Portal Logout

Show this type of notification in the portal when it is received?  
 Yes  No

Show this type of notification as important?  
 Yes  No

Notification: Request Delegate position  
Request for Delegate Position has been rejected by the Department.  
This notification is seen by: Assessor Team Lead

Send an email when this type of notification is received?  
 Yes  No

Send the email:  
Immediate

Show this type of notification in the portal when it is received?  
 Yes  No

Show this type of notification as important?  
 Yes  No