



Australian Government



myagedcare

My Aged Care Assessor Portal User Guide for Residential Aged Care (RAC) Funding Assessor Team Leaders

This user guide is for RAC funding assessor team leads and describes activities that they can perform.

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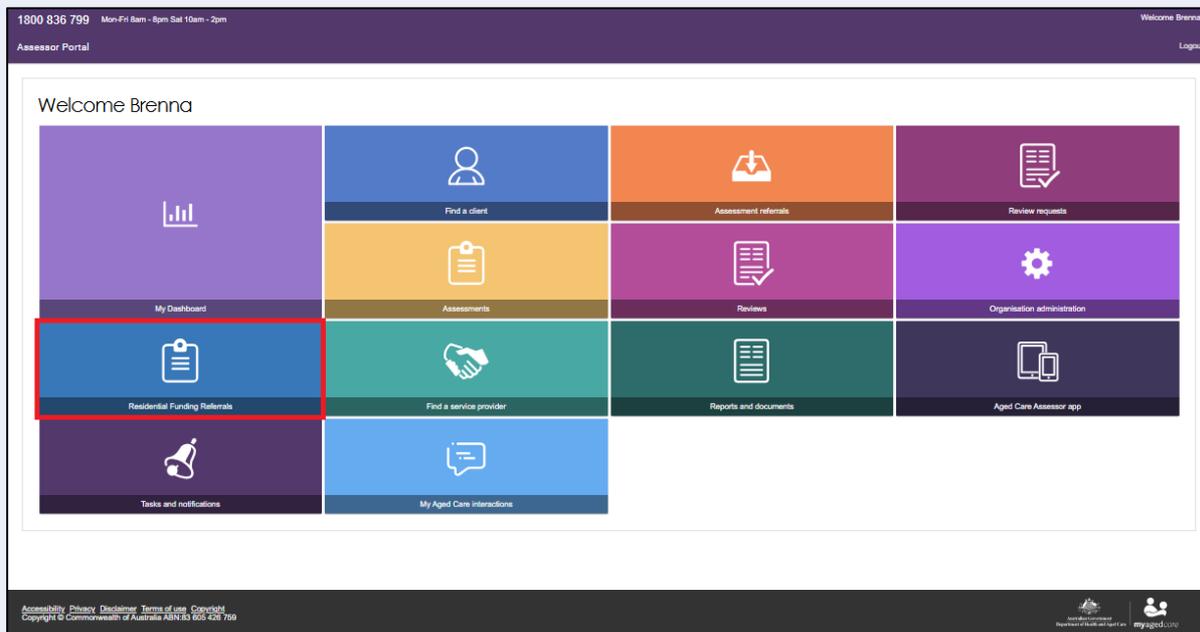
RAC Funding Assessor Functions

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

RAC Funding Assessor Team Leads can also access the roles of the RAC Funding Assessor.

Viewing Referrals

Select the Residential Funding Referrals tile from the assessor portal home page.

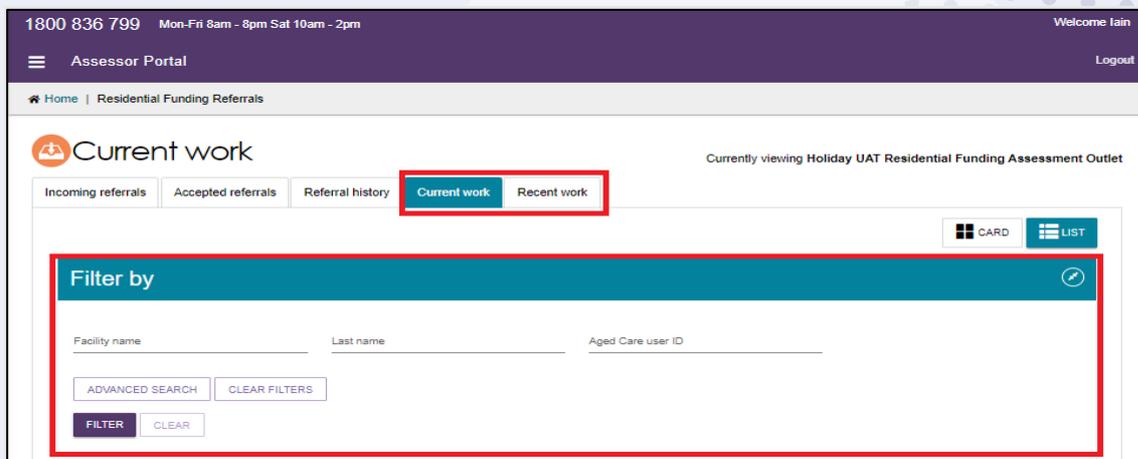


Select the Current work or Recent work tabs.

The Current work screen lists all the open referrals that are assigned to a RAC Funding Assessor.

The Recent work screens lists all the closed referrals that were assigned to a RAC Funding Assessor.

Users can refine these lists by using the **Filter by** and **ADVANCED SEARCH** functions.



View the different referral priorities in each client card (or list) as outlined below. You can also

sort them based on these priorities.

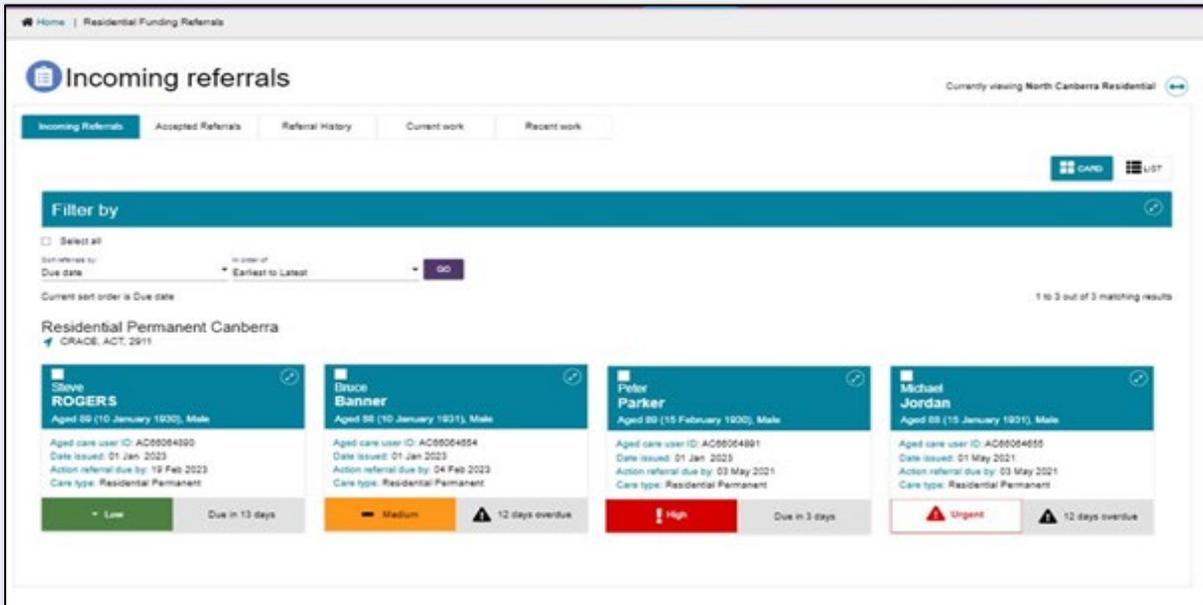
Card View:

Low: white text in a green background

Medium: black text in a yellow background

High: Exclamation mark followed by white text, in a red background

Urgent (for Residential Permanent Referrals only): White exclamation mark inside a red triangle, followed by red text, in a white background.



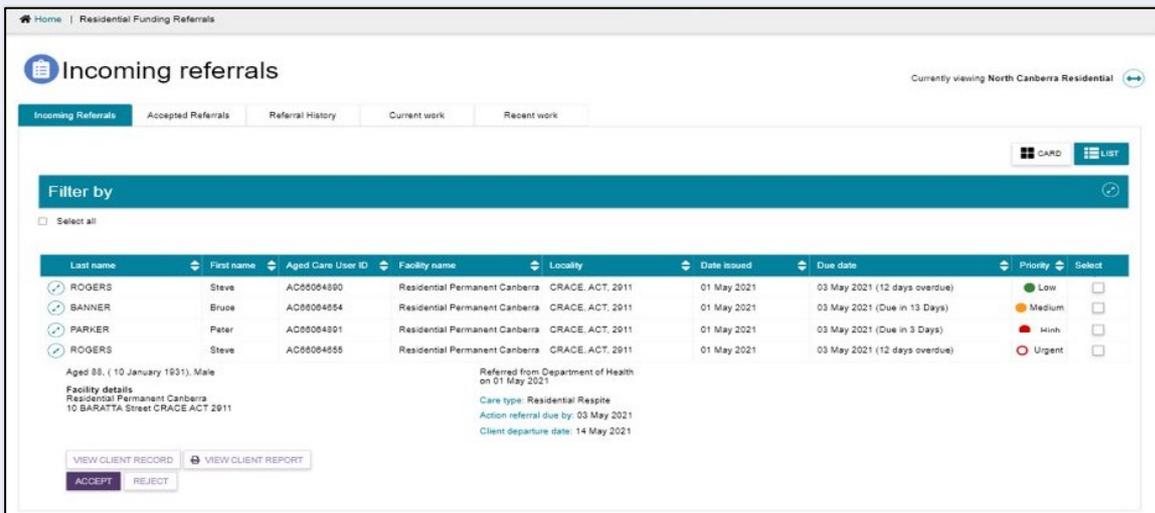
List View:

Low: Green circle

Medium: Yellow circle

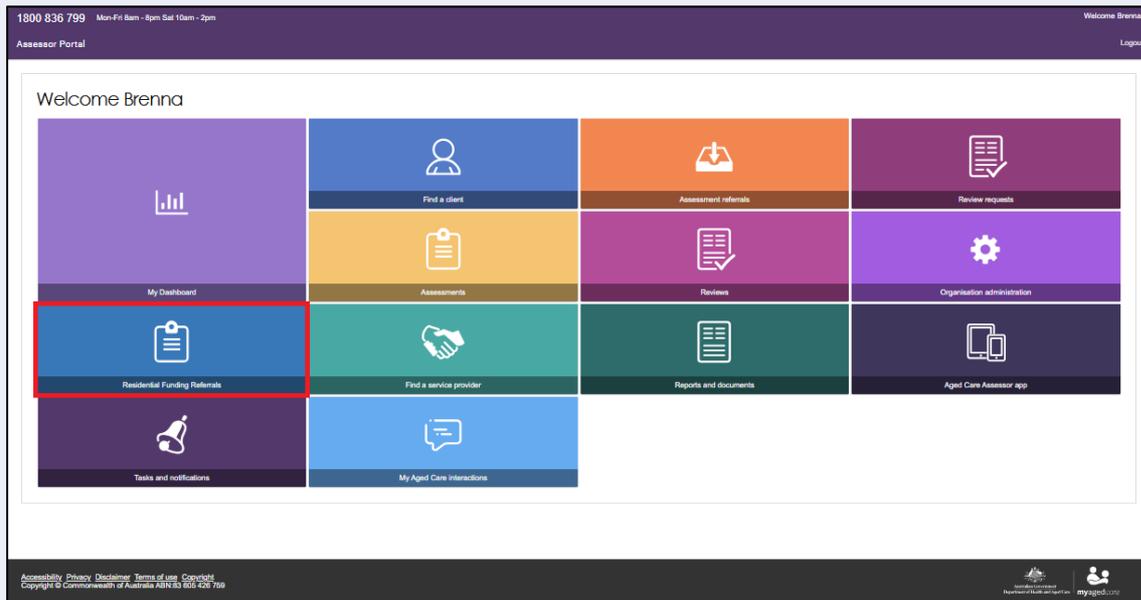
High: Red circle

Urgent: White circle with a red outline.

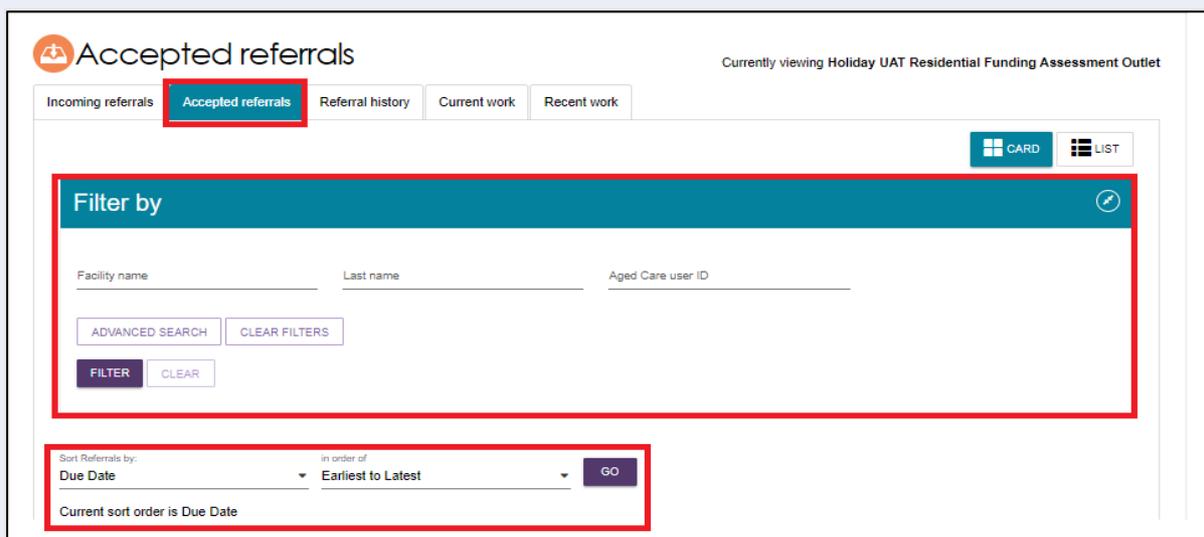


Accepting Assigned Referrals

Select the **Residential Finding Referrals** tile from the Assessor portal home page.



Navigate to the **Accepted Referrals** tab. You can conduct a search or an advanced search to refine the list of accepted referrals.

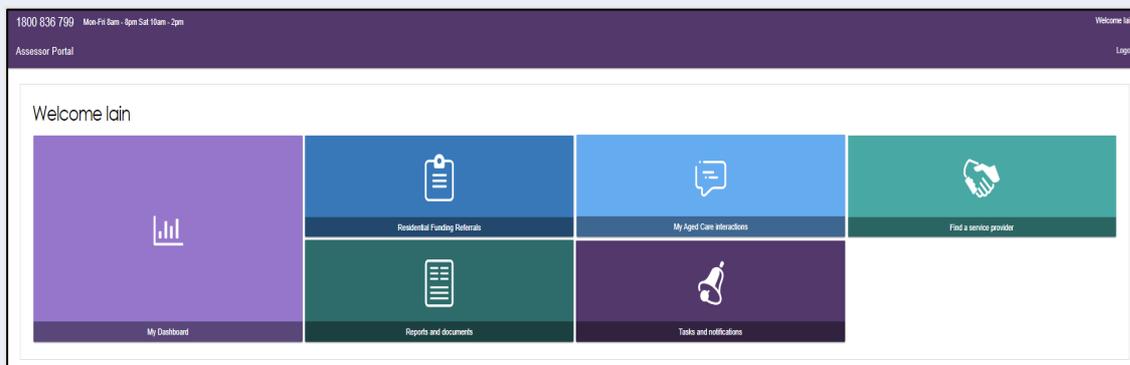


A pop-up box will appear confirming the client/s whose referral you wish to accept. Once you have confirmed, select the **ACCEPT** button.



RAC Funding Assessor Team Lead Functions

RAC 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.



Viewing Referrals

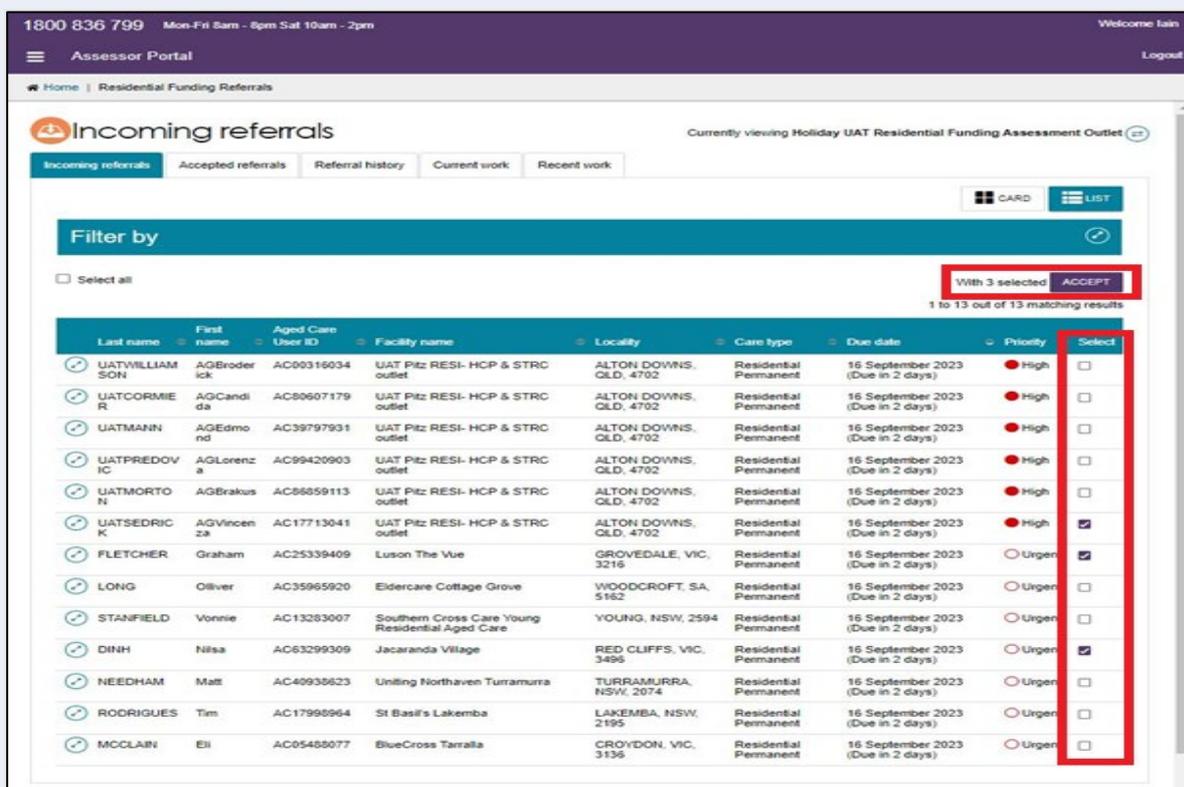
Refer to [Viewing Referrals](#).

Accepting Assigned Referrals

Refer to [Accepting Assigned Referrals](#).

Bulk Accepting Referrals

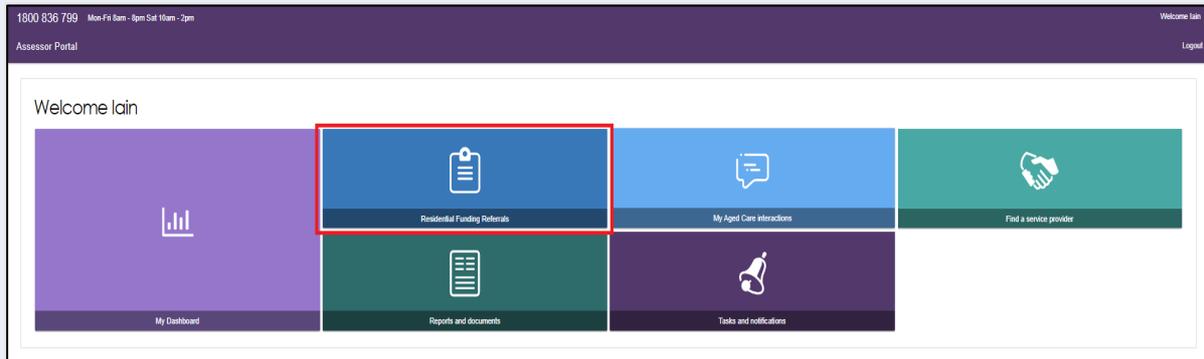
To bulk accept referrals, select the **Incoming referrals** tab, then select the tick box next to each of the clients names that you want to assign, then select the **ACCEPT** button.



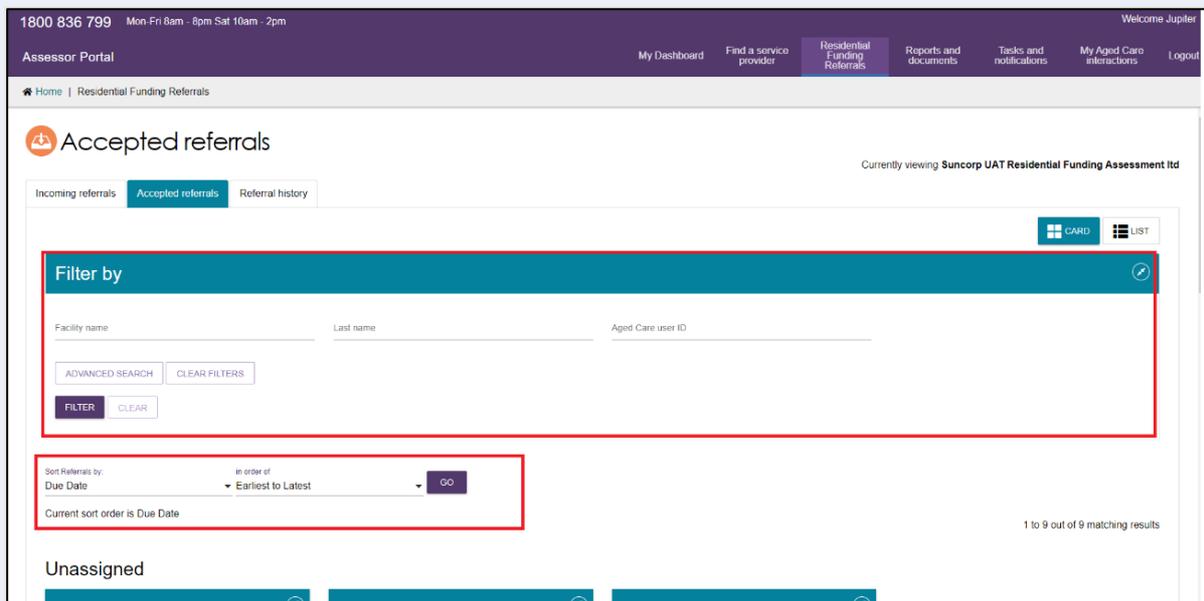
Assigning Referrals

Residential Funding Team Leads can assign referrals to assessors.

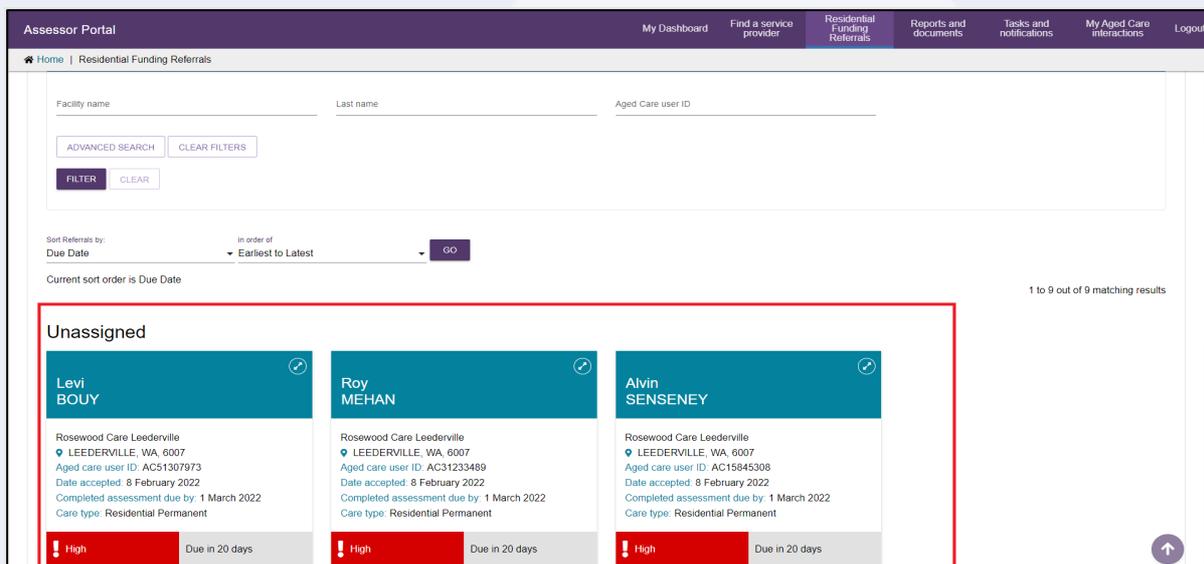
From the Assessor portal home page, select the **Residential Funding Referrals** tile.



Navigate to the **Accepted Referrals** tab. You can filter the list of referrals or conduct an advanced search to refine the list of unassigned referrals.



Select the referral you wish to assign from the unassigned list of referrals.



A pop-up will appear confirming the referral you wish to assign, Select the **ASSIGN** button.

Levi BOUY

Aged 99 (2 July 1922), Female

Referred from Department of Health on 1 February 2022

Facility details
Rosewood Care Leederville
5 BRITANNIA Road LEEDERVILLE WA 6007

Care Type: **Residential Permanent**
Action referral due by: **1 March 2022**

VIEW CLIENT RECORD VIEW CLIENT REPORT

ASSIGN REJECT

Another pop-up will appear. Select the assessor you wish to assign the referral to and select the **ASSIGN** button.

Accept this referral for Levi Bouy

Rosewood Care Leederville, LEEDERVILLE, WA, 6007

Select an assessor to assign this referral to *

- Orth Lora (4 referrals assigned,0 referrals assigned in postcode 6007)
- Josh Powell (2 referrals assigned,0 referrals assigned in postcode 6007)
- Melissa Powell (0 referrals assigned,0 referrals assigned in postcode 6007)

ASSIGN CANCEL

The referral will now be assigned to the assessor/s selected.

Bulk Assigning Referrals

To bulk assign referrals, go to the Incoming referrals tab.

Select two or more checkboxes against the client card or line, then select **ASSIGN**. The Select all checkbox is also available. The text to the left of the **ACCEPT** or **ASSIGN** buttons will show the number of clients selected, for example, With 3 selected.

Home | Residential Funding Referrals

Incoming referrals Accepted referrals Referral history Current work Recent work

Currently viewing Holiday UAT Residential Funding Assessment Outlet

Filter by

Select all

With 3 selected ACCEPT or ASSIGN

1 to 9 out of 9 matching results

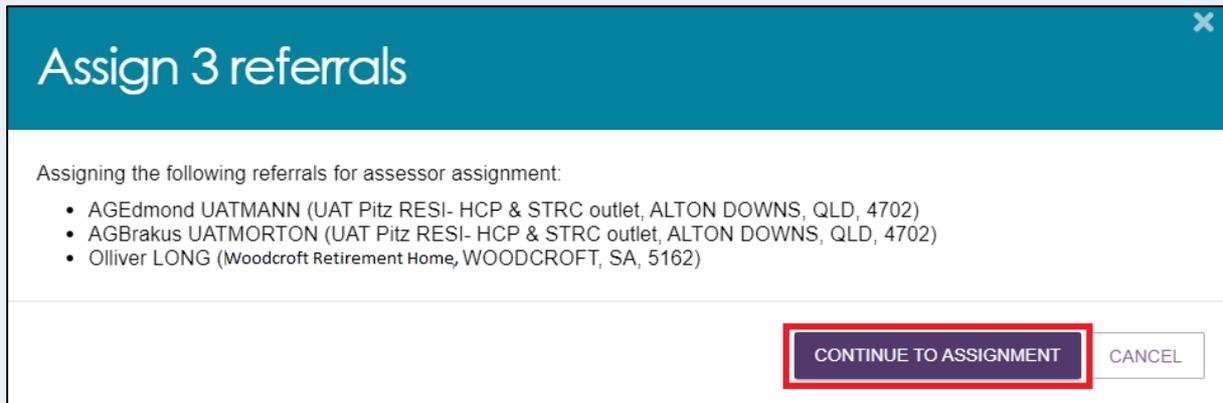
Last name	First name	Aged Care User ID	Facility name	Locality	Care type	Due date	Priority	Select
UATWILLIAMSON	AGBroderick	AC00316034	UAT Ptiz RESI- HCP & STRC outlet	ALTON DOWNS, QLD, 4702	Residential Permanent	16 September 2023 (122 days overdue)	High	<input type="checkbox"/>
UATCORMIER	AGCandida	AC80607179	UAT Ptiz RESI- HCP & STRC outlet	ALTON DOWNS, QLD, 4702	Residential Permanent	16 September 2023 (122 days overdue)	High	<input type="checkbox"/>
UATMANN	AGEdmund	AC39797931	UAT Ptiz RESI- HCP & STRC outlet	ALTON DOWNS, QLD, 4702	Residential Permanent	16 September 2023 (122 days overdue)	High	<input checked="" type="checkbox"/>
UATMORTON	AGBrakus	AC86859113	UAT Ptiz RESI- HCP & STRC outlet	ALTON DOWNS, QLD, 4702	Residential Permanent	16 September 2023 (122 days overdue)	High	<input checked="" type="checkbox"/>
LONG	Olliver	AC35965920	Woodcroft Retirement Home	WOODCROFT, SA, 5162	Residential Permanent	16 September 2023 (122 days overdue)	Urgent	<input checked="" type="checkbox"/>
STANFIELD	Vonnie	AC13283007	Young Residential Aged Care	YOUNG, NSW, 2594	Residential Permanent	16 September 2023 (122 days overdue)	Urgent	<input type="checkbox"/>

A pop up appears confirming the number of referrals being assigned for assessor assessment. It



shows the name of the client followed by information of their outlet or facility, suburb, state and postcode.

Select **CONTINUE TO ASSIGNMENT**.



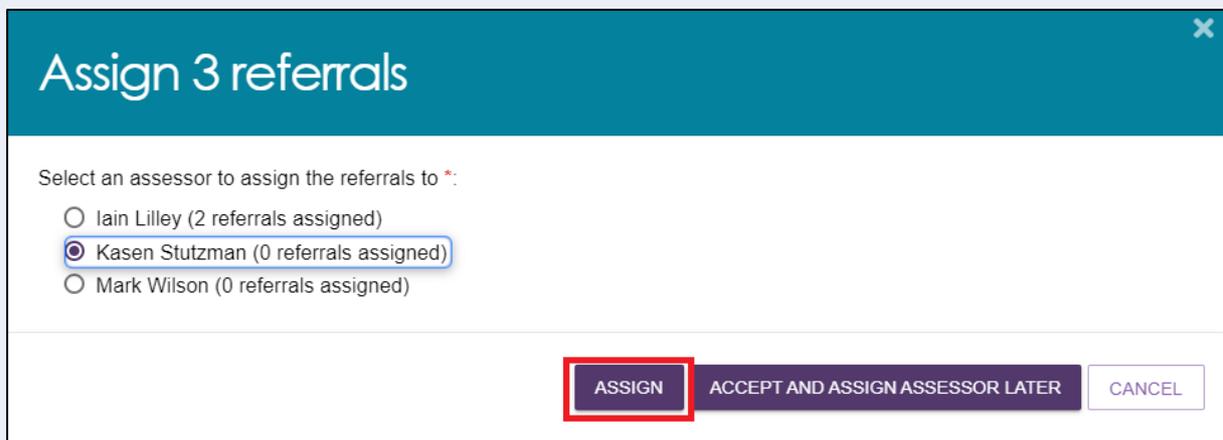
Assign 3 referrals

Assigning the following referrals for assessor assignment:

- AGEdmond UATMANN (UAT Pitz RESI- HCP & STRC outlet, ALTON DOWNS, QLD, 4702)
- AGBrakus UATMORTON (UAT Pitz RESI- HCP & STRC outlet, ALTON DOWNS, QLD, 4702)
- Olliver LONG (Woodcroft Retirement Home, WOODCROFT, SA, 5162)

CONTINUE TO ASSIGNMENT CANCEL

Another pop up lists available assessor/s, and how many referrals they are assigned already. Select an assessor, then select **ASSIGN** or **ACCEPT AND ASSIGN ASSESSOR LATER**.



Assign 3 referrals

Select an assessor to assign the referrals to *:

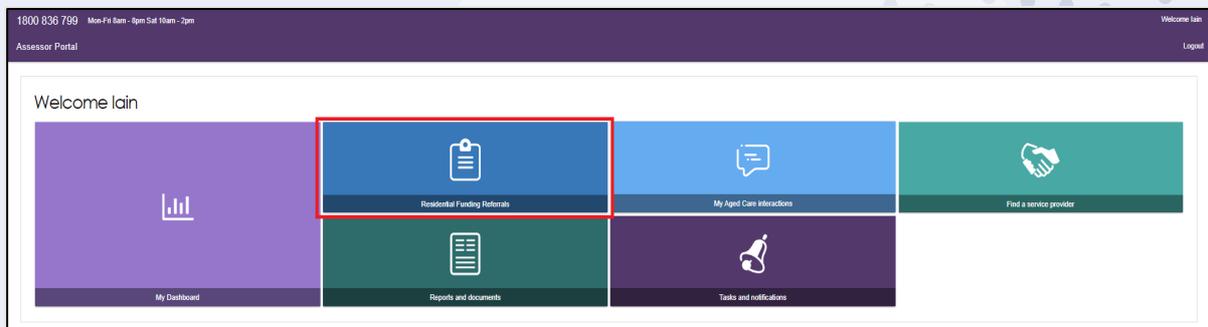
- Iain Lilley (2 referrals assigned)
- Kasen Stutzman (0 referrals assigned)
- Mark Wilson (0 referrals assigned)

ASSIGN ACCEPT AND ASSIGN ASSESSOR LATER CANCEL

Rejecting Referrals

RAC funding team leads are able to reject referrals that are both incoming and assigned.

From the Assessor portal home page, select the **Residential Funding Referrals** tile.



1800 836 799 Mon-Fri 9am - 5pm Sat 10am - 2pm Welcome Iain

Assessor Portal

Welcome Iain

Residential Funding Referrals My Aged Care Interactions Find a service provider

My Dashboard Reports and documents Tasks and notifications

Select the referral you wish to reject.



Assessor Portal

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

Home | Residential Funding Referrals

Filter by

Select all

Sort Referrals by: Due Date in order of: Earliest to Latest GO

Current sort order is Due Date

1 to 20 out of 269 matching results

Rosewood Care Leederville
LEEDERVILLE, WA, 6007

<input type="checkbox"/> <p>Emil, LUDLUM</p> <p>Aged care user ID: AC47876255 Date issued: 1 February 2022 Action referral due by: 4 February 2022 Care type: Residential Permanent</p> <p>High 5 days overdue</p>	<input type="checkbox"/> <p>Mack, DAMION</p> <p>Aged care user ID: AC80927809 Date issued: 1 February 2022 Action referral due by: 4 February 2022 Care type: Residential Permanent</p> <p>High 5 days overdue</p>	<input type="checkbox"/> <p>Jacob, DAMION</p> <p>Aged care user ID: AC07680119 Date issued: 1 February 2022 Action referral due by: 4 February 2022 Care type: Residential Permanent</p> <p>High 5 days overdue</p>	<input type="checkbox"/> <p>Leon, CONLAN</p> <p>Aged care user ID: AC83799221 Date issued: 1 February 2022 Action referral due by: 4 February 2022 Care type: Residential Permanent</p> <p>High 5 days overdue</p>
<input type="checkbox"/> <p>Will, MEIGGS</p>	<input type="checkbox"/> <p>Richard, MONFORE</p>	<input type="checkbox"/> <p>Claude, MEHAN</p>	<input type="checkbox"/> <p>Wesley, CRAYFORD</p>

A pop-up will appear. Confirm this is the referral you wish to reject, and select the **REJECT** button.

Emil, LUDLUM

Aged 76 (29 November 1945), Female

Referred from Department of Health on 1 February 2022

Facility details
Rosewood Care Leederville
5 BRITANNIA Road LEEDERVILLE WA 6007

Care Type: **Residential Permanent**
Action referral due by: **4 February 2022**

[VIEW CLIENT RECORD](#) [VIEW CLIENT REPORT](#)

ACCEPT **REJECT**

Another pop-up will appear. Select the reason for the referral rejection and provide details in the free text field. Once complete, select the **REJECT** button.

Reject this referral for Emil Ludlum

Rosewood Care Leederville, LEEDERVILLE, WA, 6007

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

Select rejection reason *

- Client Unavailable
- Client Deceased
- Outlet Insufficient Capacity
- Other

Details:

0 / 500

REJECT CANCEL



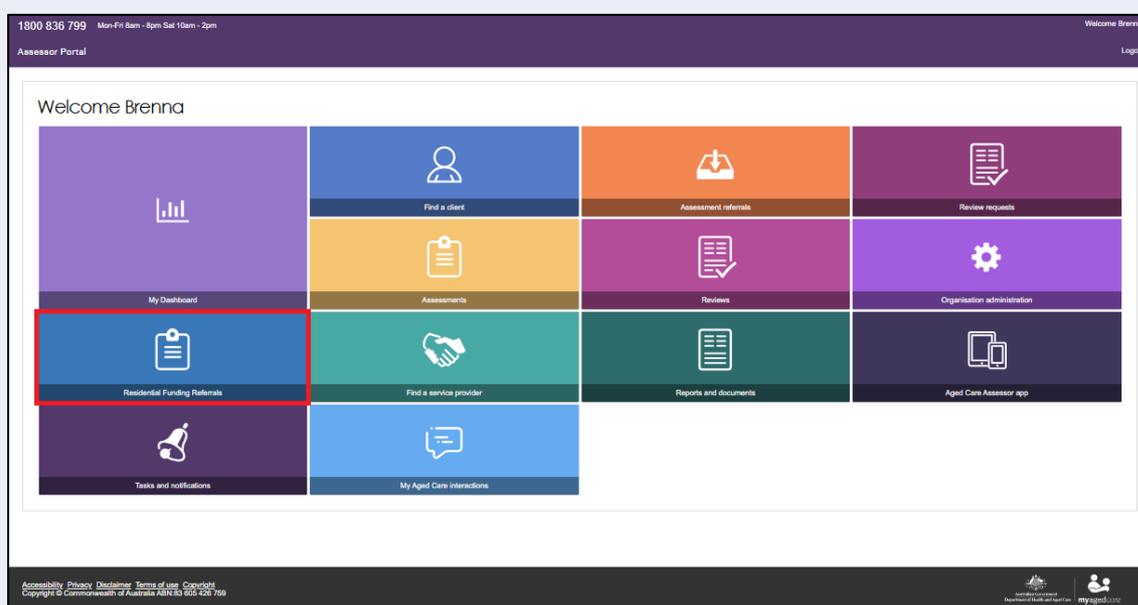
Transferring Referrals

Both departmental staff and RAC Funding Assessor Team Leads can transfer **Residential Permanent** referrals between Assessment Outlets (Assessment Organisations) without needing to recall the referrals first.

! RAC funding team leads can transfer a new referral where an unrestricted assessment is not in progress, in the case their outlet/organisation unexpectedly does not have the capacity to accept the referral. For example, the outlet/organisation has received an urgent referral but does not have any assessors available to complete the referral in the required timeframe.

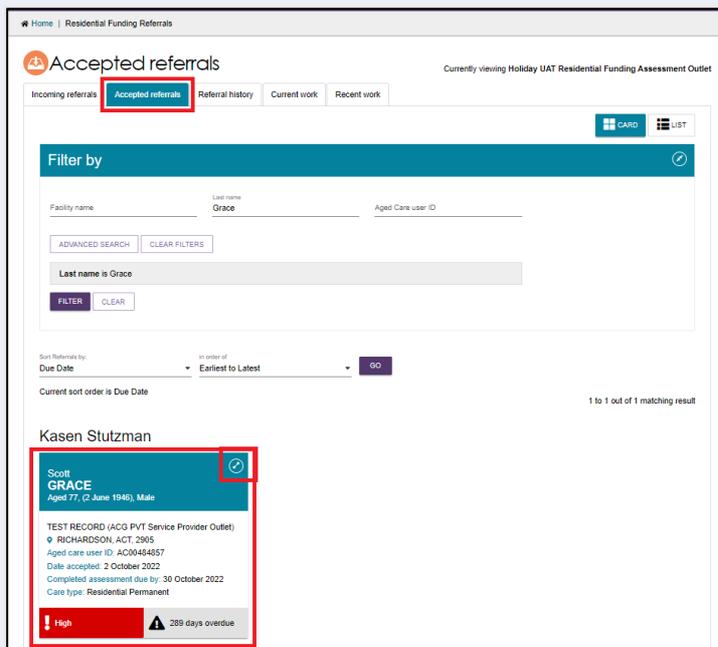
Prior to completing the transfer, the Team Lead must contact the organisation they want to transfer the referral to and confirm they have the capacity and are willing to accept the referral. (The receiving organisation must be in the same ACPR - Aged Care Planning Region).

In the Assessor Portal, go to the **Residential Funding Referrals** tile.



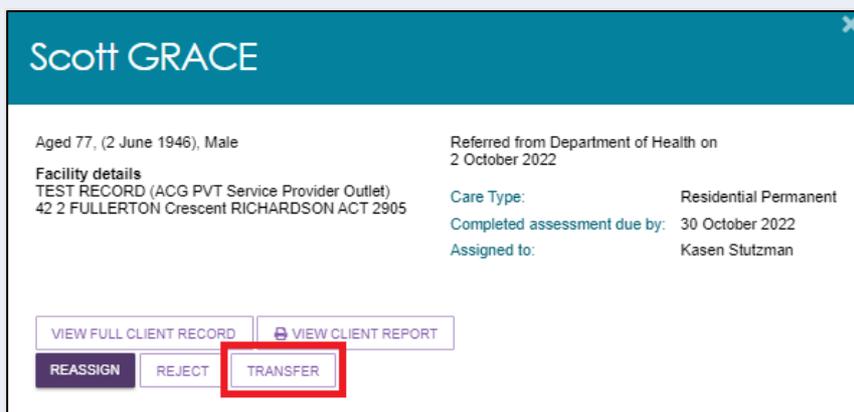
Go to the **Accepted Referrals** tab and select a care recipient by expanding the client card.





A pop up appears. Select the **TRANSFER** Button. Note that only Residential Permanent clients have the Transfer option available.

If an assessor has already started an assessment on this client, there will be a red error banner and the transfer will be disabled.



The **Transfer This referral** page appears. Fill in all mandatory fields denoted with a red asterix. This includes the assessment organisation, reason for transferring, etc.

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Assessor Portal My Dashboard Find a service provider Residential Funding Referrals Reports and Documents Tasks and notifications My Ag Inter

Home | Residential Funding Referrals | Transfer

Transfer this referral for Michael Jordan

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

Select Assessment Organisation: *

ACT RF East, CITY, Ph 02 6145 8124

ACT RF South, WODEN, Ph 02 6145 8346

Reason: *

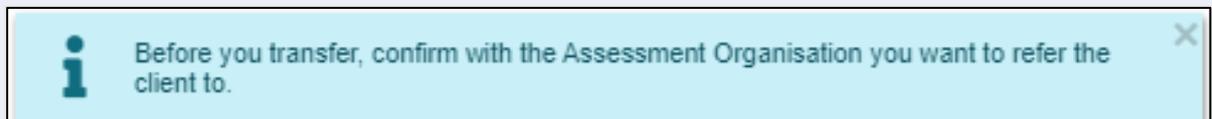
This client requires urgent attention

37/250

Before you transfer, confirm with the Assessment Organisation you want to refer the client to

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A reminder banner appears to remind you that before you transfer, to confirm with the Assessment Organisation that you want to refer the client to.



! If there are no assessment organisations in the same Aged Care Planning Region, then the transfer pop-up will appear with No matching results found. In this case, the **TRANSFER** button will be disabled, and you must contact the Department to transfer the referral for you.

Home | Residential Funding Referrals | Transfer Referrals

Transfer this referral for Scott GRACE

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

Select an Assessment Organisation: *

No matching results found

Transferred referrals will appear in **Referral History** tab. The client card will show a Rejected status, and a reason of Transferred.



Michael JORDAN ✕

Aged 88, (15 January 1931), Male

Referral details
 Care type: Residential Permanent
 Action referral due by:
 Referred from: Assessor on 30 April 2021

Client Story
 No client story was recorded

Client Notes
 No client notes were recorded

Referral Status Reason: Rejected
Referral Status Description: Transferred

[VIEW CLIENT RECORD](#) [VIEW CLIENT REPORT](#)

The receiving assessment organisation will be able to view the referral in their incoming referrals. Your transfer comments will then be visible to the receiving assessment organisation.

Michael JORDAN ✕

Aged 88, (15 January 1931), Male

Referral details
 Care type: Residential Permanent
 Action referral due by:
 Referred from: Assessor on 30 April 2021

Client Story
 No client story was recorded

Client Notes
 No client notes were recorded

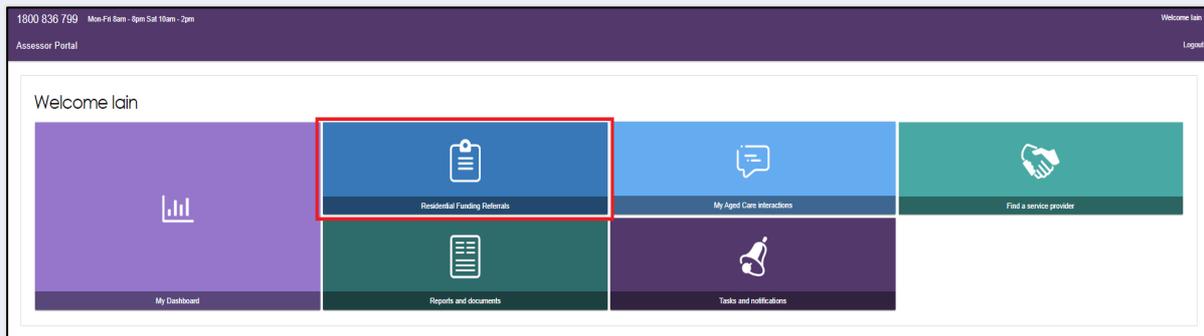
Transfer Reason: Other
Transfer Comments: We need someone else to take this assessment

[VIEW CLIENT RECORD](#) [VIEW CLIENT REPORT](#)

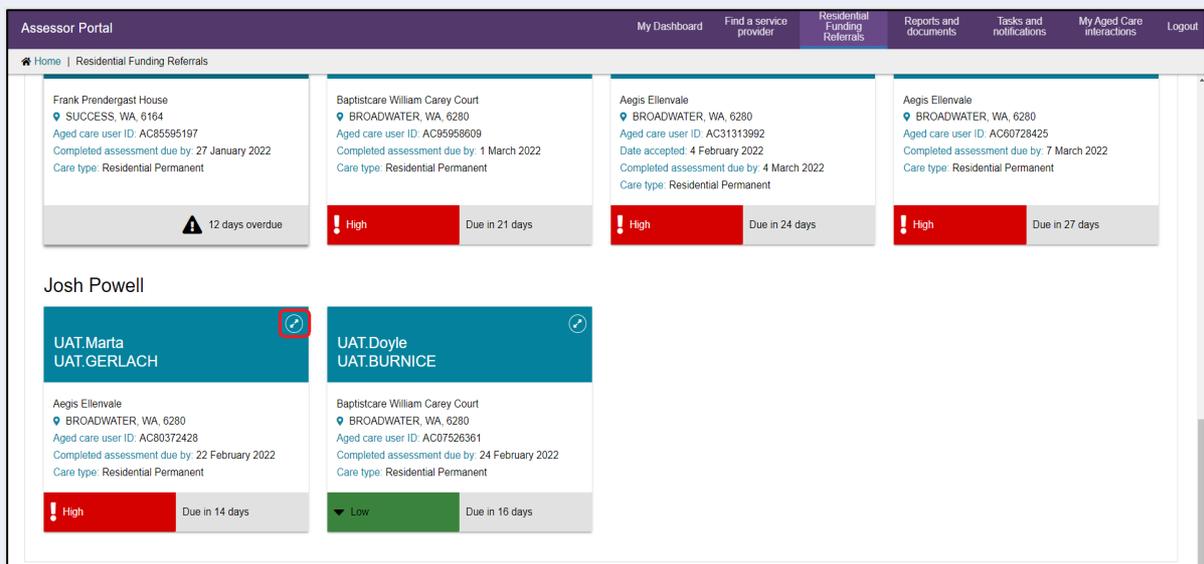
Reassigning Referrals

RAC funding team leads can re-assign referrals that have been assigned to assessors.

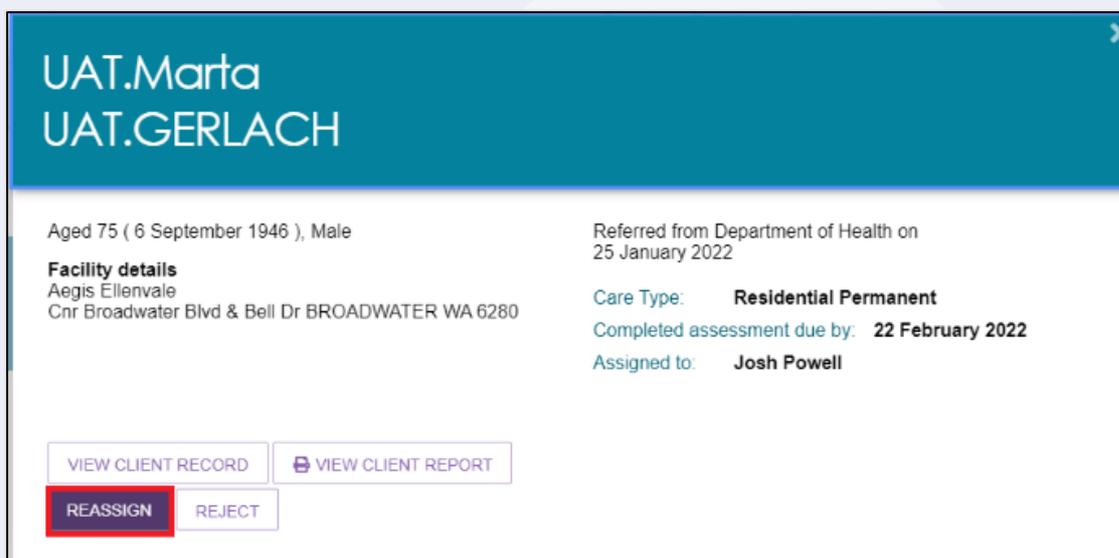
From the Assessor portal home page, select the **Residential Funding Referrals** tile.



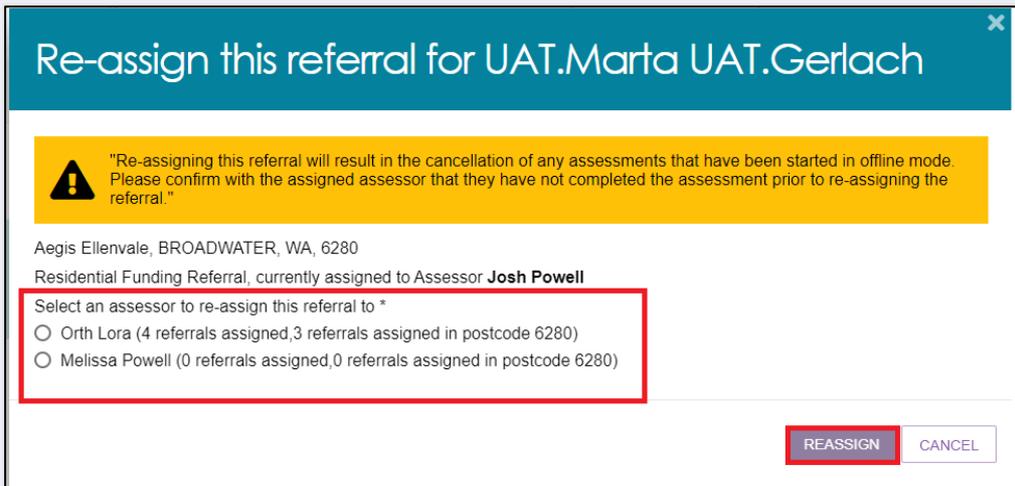
Navigate to the **Accepted Referrals** tab. You can search for the referral you wish to re-assign or scroll to the assessors referrals that you wish to re-assign.



A pop-up will appear. Select the **REASSIGN** button.



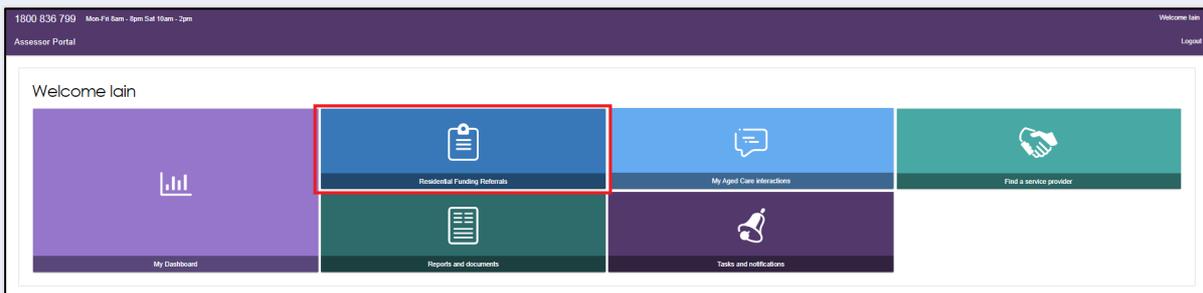
Another pop-up will appear. Select the assessor you wish to re-assign the referral to and select the **REASSIGN** button.



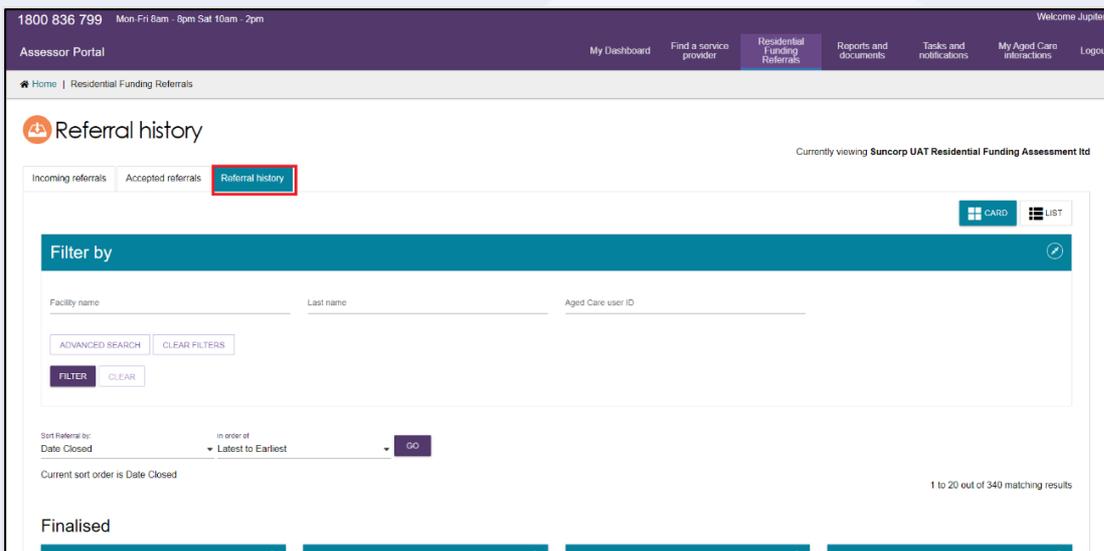
Viewing historical Residential Funding Referrals

RAC Funding team leads can view historical Residential Funding Referrals for their organisation or outlet.

From the Assessor portal home page, select the **Residential Funding Referrals** tile.



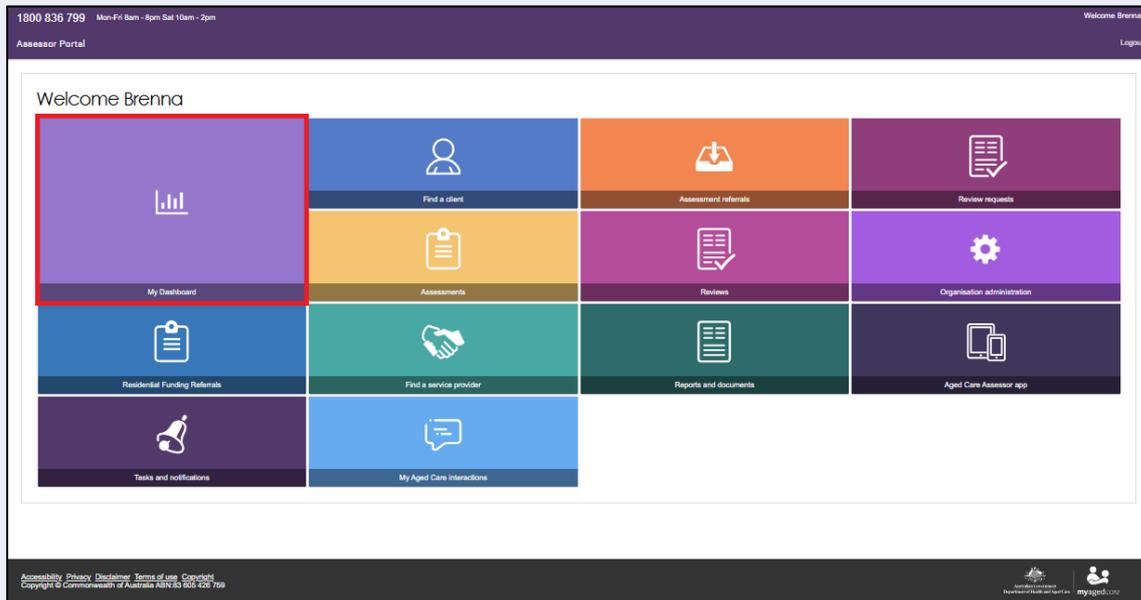
Navigate to the **Referral History** tab. You can either search or filter the list of referrals, or scroll down to see the finalised referrals for your outlet/organisation.



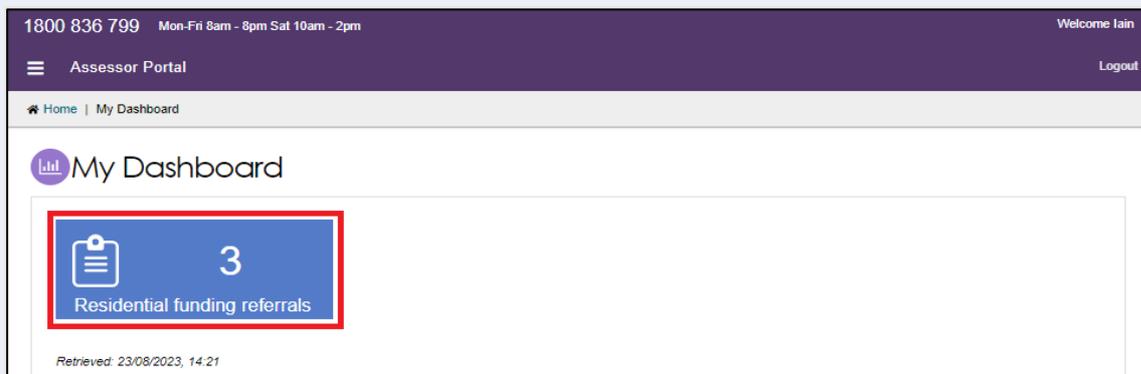
Viewing progress of Residential funding assessments

RAC Funding Team leads are able to view the progress of RAC Funding Assessments for their outlet or organisation.

1. From the Assessor portal home page, select the **My Dashboard** tile.

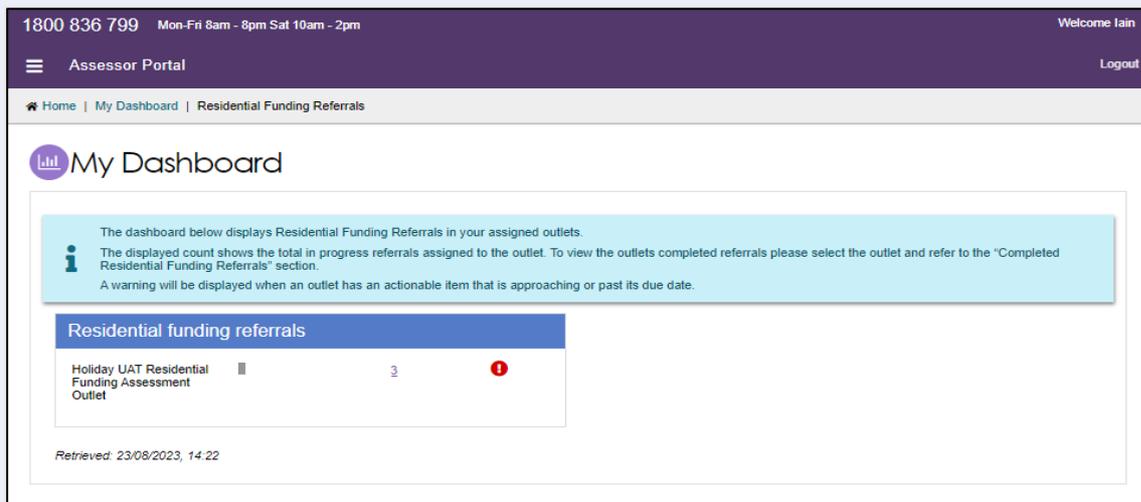


2. Select the blue **Residential funding referrals** tile.



3. You will now be able to see an overview of the **Residential Funding Referrals** for your organisation/outlet.



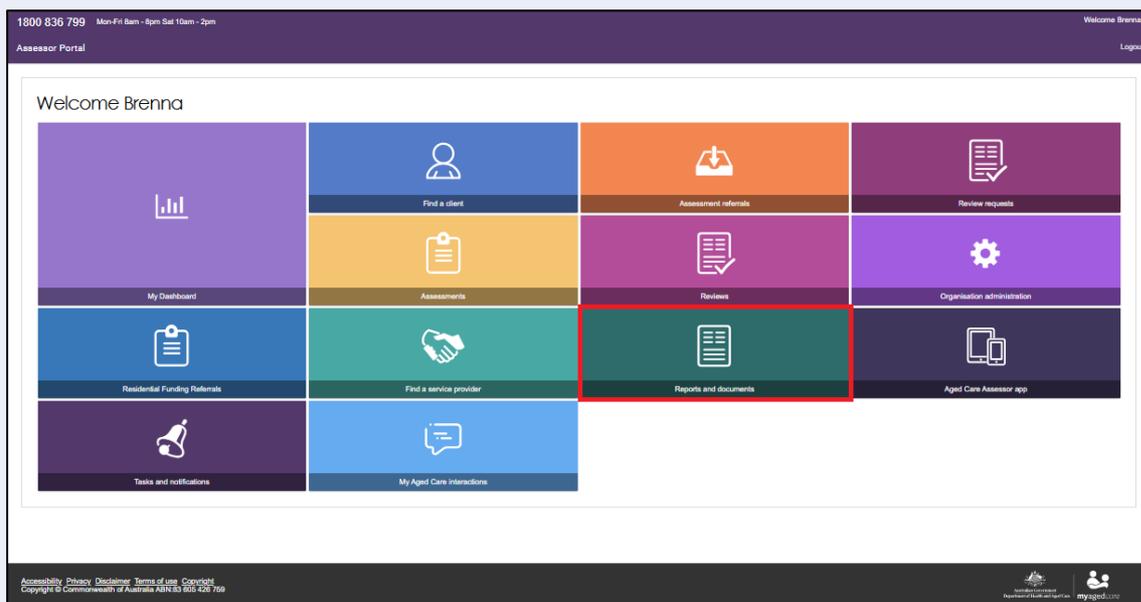


Generating a Training or Quality Assurance Assessment Report

RAC funding team leads can monitor when an unrestricted assessor last participated in a Quality Assurance assessment. The results of Quality Assurance and Training assessments can also be compared to improve the quality of assessments as required.

To view these reports, follow the below steps:

From the home page of the Assessor portal, select the **Reports and Documents** tile.



Select the hyperlink for the **AR-2-13 – Residential Funding Assessment Quality Assurance and Training Report**.



Reports and documents

Reports Forms Links

My Reports

Name	Requested Date	Status
------	----------------	--------

No Records found

Reports List

Name	Description	Formats
AR2-13 - Residential Funding Assessment Quality Assurance and Training Report		Pdf, Csv, Excel



Fill in all the mandatory fields. You must select whether you would like a report for **Quality Assurance** or **Training Assessments** and choose the output type of the report (PDF, CSV or Excel). Select **Request Report** button.

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Assessor Portal My Dashboard Find a service provider Residential Funding Referrals Reports and documents Tasks and notifications My Aged Care Interactions Logout

Home | Reports

Generate report

Reports Forms Links

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

AR2-13 - Residential Funding Assessment Quality Assurance and Training Report

Outlet name * Suncorp UAT Residential Funding Assessment Ltd Residential Funding Assessor *

Assessment Tool * Assessment date From * 16/02/2022

Assessment date To * 15/02/2022 Quality Assurance or Training * Quality Assurance

Show discrepancies only:

Output Type * Pdf

REQUEST REPORT CANCEL

A report will be generated that you will be able to download and view. The example below is a Quality Assurance report for one outlet in PDF format.

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RFA Quality Assurance Report

Name of Outlet: Holiday UAT Residential Funding Assessment Outlet

Assessor Summary
No Data Available

Assessor Detail
No Data Available

Report Run: 23/08/2023 2:28:36 PM By: BL_HF569470 Data Current as at: 11/08/2023 5:21:19 PM Page: 1

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