



Australian Government



myagedcare

Aged Care Assessor App User Guide

This Aged Care Assessor App (the App) user guide outlines essential information for both aged care needs assessors (needs assessors) who use the Integrated Assessment Tool (IAT) and/or residential aged care funding assessors (RAC funding assessors) who use the Australian National Aged Care Classification (AN-ACC) assessment tool.

The user guide will walk users through how the App can be utilised both online and offline, allowing for users to use the App in different situations.

This user guide has been split into the following sections:

- Part A is for needs assessors and/or RAC funding assessors who complete assessments using either AN-ACC or IAT.
- Part B is for needs assessors who complete assessments using the IAT.
- Part C is for RAC funding assessors who complete assessments using the AN-ACC assessment tool.

Version 4.0 – 24 February 2025



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Part A - Needs assessors and RAC funding assessors

1. Introduction

The Aged Care Assessor App (the App) enables both needs assessors and RAC funding assessors to assess an older Australians' aged care needs while offline. The App allows users to perform a subset of the functions available in the assessor portal, including the ability to conduct an assessment using the Integrated Assessment Tool (IAT) or Australian National Aged Care Classification (AN-ACC) assessment tool.

Needs assessors and RAC funding assessors can undertake these processes using the App:

- Search for existing and register new clients.
- Create offline clients.
- Self-refer for assessment
- View and search assigned referrals.
- Download a client's referral for assessment.
- Download a client's support plan review (needs assessors only).
- View and add information about a client.
- Complete identity verification (wallet check).
- Undertake assessments using IAT (needs assessors only).
- Undertake assessments using AN-ACC (RAC funding assessors only).
- Undertake support plan reviews. (needs assessors only)
- Commence development and update a client's support plan.
- Upload assessment and review information to the My Aged Care assessor portal.
- View and upload client attachments.
- Manually remove or cancel assessments from the App.
- View and set up representative relationships.
- Complete Residential Respite Classification Assessments (clinical needs assessors only).

2. Minimum operating systems for devices to run the App

The App is supported on the following operating systems:

- Android - available on Google Play
 - Version 13.0 and up
- iOS - available on the Apple App Store
 - iPadOS 17.0 or later
 - MacOS 11.0 or later, and a Mac with Apple M1 chip or later.
- Windows 10+ - available on the Microsoft Store.
 - Windows 10 version 17763.0 or higher

Please note: the screenshots in this guide feature the app version 30.0.0.1 in Windows 11.

- If you are using another device, the App will appear slightly differently.



! The App will time out if inactive for 15 minutes and you will need to log in again.

If you do not use the App for 14 days, you will be locked out of the app. You will require an unlock code, which can be generated from the app section in the My Aged Care Assessor Portal.

3. Downloading and activating the App

! Prior to using the App, you will need to:

- [Download the App](#) from your device's application store.
- Have an active role in the assessor portal (you must ensure your registered email address is current and up to date).
- Have an activation code, that can be obtained either via the App section of the assessor portal or by calling the My Aged Care service provider and assessor helpline (1800 836 799). The activation code will be active for 24 hours from the time it is issued. If your code expires, select **Get Activation Code** in the App section of the assessor portal or call 1800 836 799 to have another code issued. For RAC funding assessors, they can call the AN-ACC Operational Support Line on 02 6289 7190 between 8am - 6pm AEST Monday to Friday to request an activation code.

3.1 Downloading the App

Before [downloading the App](#), depending on the device you are using, you will need to have an active:

- Microsoft account (for Windows device),
- Apple ID (for Apple iPad), or
- Google account (for Samsung/Android).

! A side-loaded version of the Windows App is available to assessment organisations that have a restricted IT environment.

For instructions on how to download the side-loaded version of the App, please refer to the section [Installing a sideloaded app \(Sideloaded version\)](#).

1. Once you have an active account, navigate to your device's application store (Microsoft store, Apple App Store, or Google Play Store)



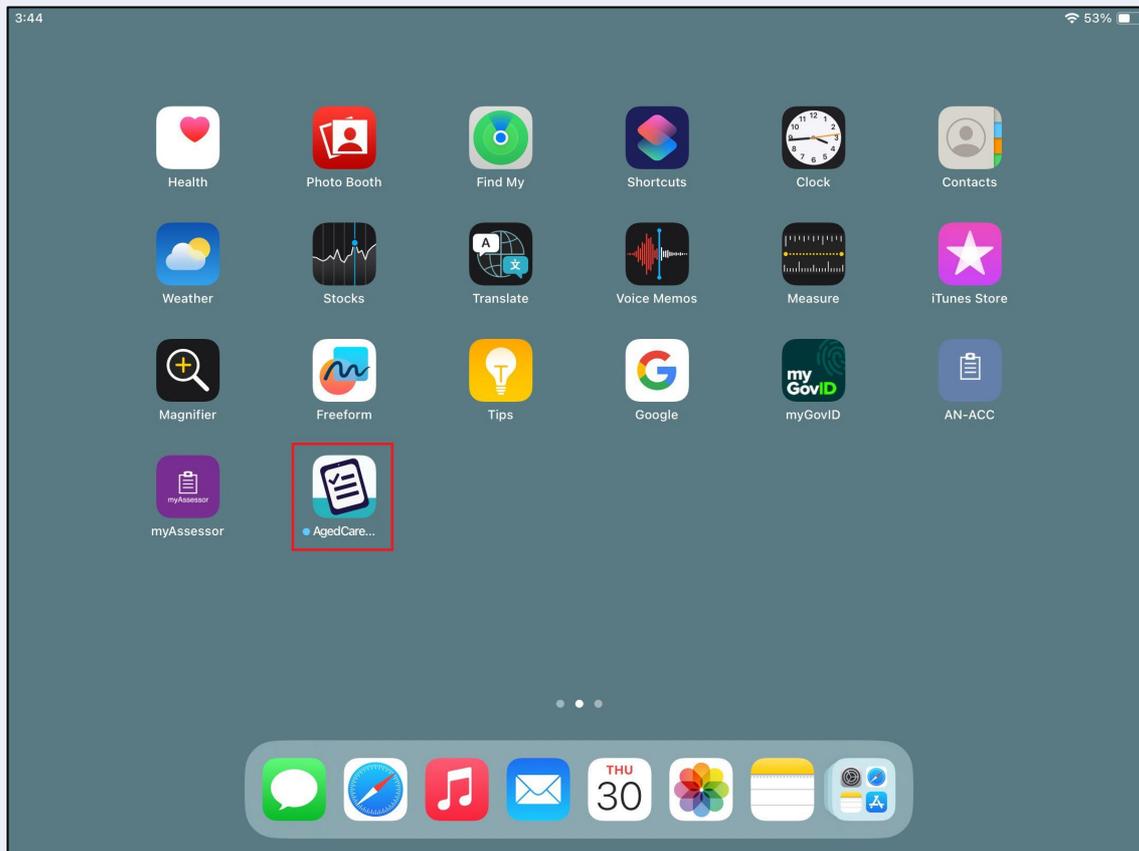
2. Search for the App by entering 'Aged Care Assessor App' in the search box and select the App icon to open the App details.



3. Select **Install** to download the App to your device. Once successfully downloaded, it will display on your device.

! The App will be located where your device stores its applications. This will differ between the supported devices.

If you have difficulties downloading the App onto your device, contact your organisation administrator or relevant IT area.



3.2 Installing a sideloaded app (Sideloaded version)

Some organisations who would like to use the App on a Windows device outside the Windows App Store, via a manual installation process with a downloaded installation file known as sideloading. The app files for Windows are available to sideload onto a Windows device running Windows 10 or above. This is to allow for businesses that have a restricted IT environment to install the app without going through the [Microsoft Store](#).

! The sideloaded app can be downloaded, a [Windows compatible \(sideloaded\) version](#) of the App is available.

My Aged Care recommends the use of the [Microsoft sideloading documentation](#) to install the app.

3.2.2 Microsoft Store (Sideloaded version)

The Microsoft Store is also known as the Windows Store.

The suffix of the version number for both apps ends with a number zero. For example: v30.0.0.0

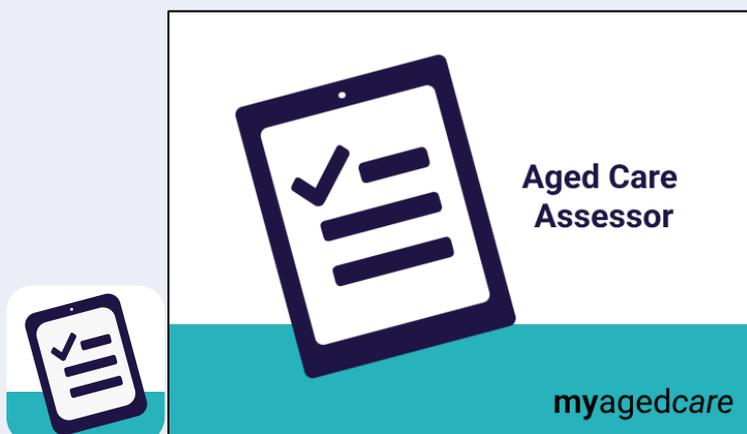
The icon for the sideloaded version of the App is the same as the non-sideloaded version:



3.2.3 Sideload (Sideloaded version)

The suffix of the version number for both apps ends with a number one. For example: v30.0.0.1

The icon and splash screen for the Aged Care Assessor is:



3.2.4 Upcoming releases of the App (Sideloaded version)

Unlike apps in the Microsoft Store, Apple App Store and Android Play Store which include automatic updates, Sideloaded apps have no automatic updates, therefore each sideload version update will require a manual installation.

The Department will notify assessment organisations of a new release at least 2 weeks prior to the release of the application. They will also be notified when the new version is available and by what date all their users should be using the new version of the app.

3.2.6 Frequently Asked Questions (Sideloaded version)

How do I sideload my app?

The Department recommends following the guide provided by Microsoft to sideload the application. This can be found at [Sideload line of business apps - Windows Application Management | Microsoft Learn](#)

When do I need to install the new release of the app onto my organisation's devices?

The new version of the app should be installed on your users' devices within 1 week from the release of the new version. Once the new release of app has gone live, users will not be able to begin any new assessments until they have been upgraded to the latest version.

How will my organisation's sideloaded app users be supported by the Department?

If you have installed the Aged Care Assessor App via the sideloading method, the Department will continue to support users for issues within the application. We may refer you to contact your organisation's IT area if we believe the issue is related to your organisation's setup.

What happens if I don't upgrade my sideloaded app to a new version when it is released?

When a user doesn't accept the updated version of the App from the Microsoft Store, they will not be able to download or access any new referrals on their device. This same restriction will happen for users who have sideloaded the application and don't have the latest version available.

What should I do if I have any issues with using my sideloaded app?

Please email your organisation's IT area and include:

- Description of the issue
- Screenshot/s of the issue
- Description of where the issue is during your assessment or other use of the app.

4. Activating the App

! The App can only be used on one device by one user at any one point in time, and access cannot be shared.

If the device needs to be assigned to another user, select the **Logout** button from the sign in screen in the app or alternatively the user that has the device assigned to them can select the **RE-ACTIVATE AGED CARE ASSESSOR APP** from the App section in their assessor portal. This will deactivate the App and send a new activation code to the user's registered email address. Please note that this will remove all client and user data from the device.



OR

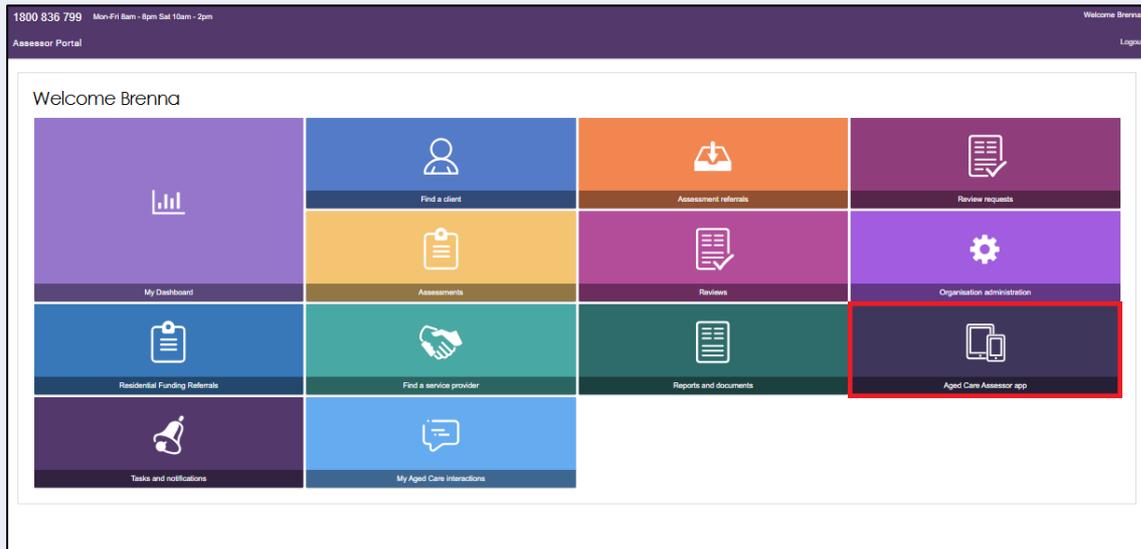


The new user will then need to log in to the App with a new activation code, which they can generate from the Assessor Portal by selecting **ACTIVATE AGED CARE ASSESSOR APP** or by calling the My Aged Care service provider and assessor helpline (1800 836 799).



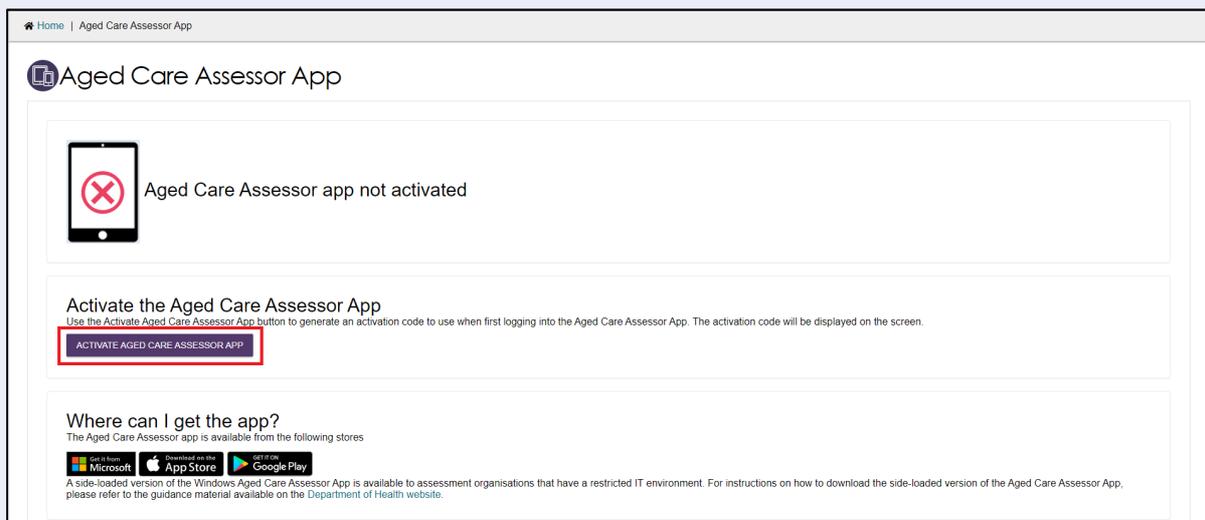
Once the App has been downloaded to your device, follow the steps below to activate the App.

1. From the home page of the My Aged Care assessor portal, navigate to the **Aged Care Assessor app** section.

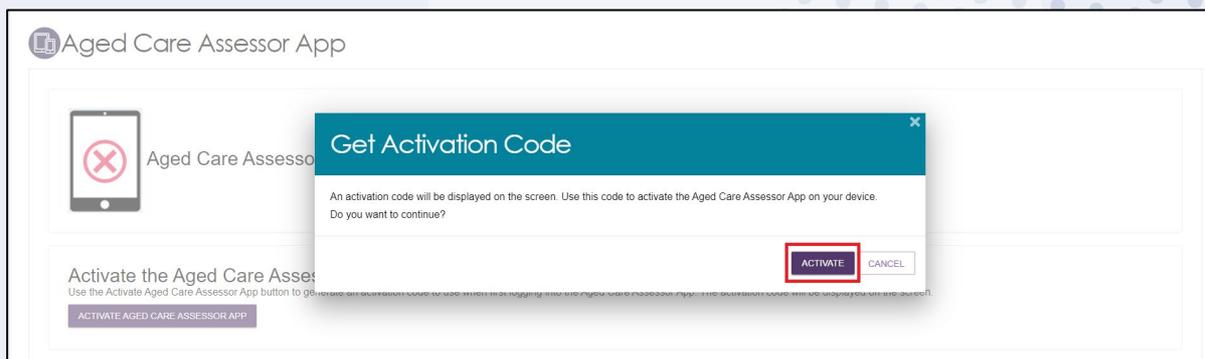


In this section, you will be able to view your App activation status, any referrals downloaded to your device, and generate a code to unlock, activate or reactivate your device.

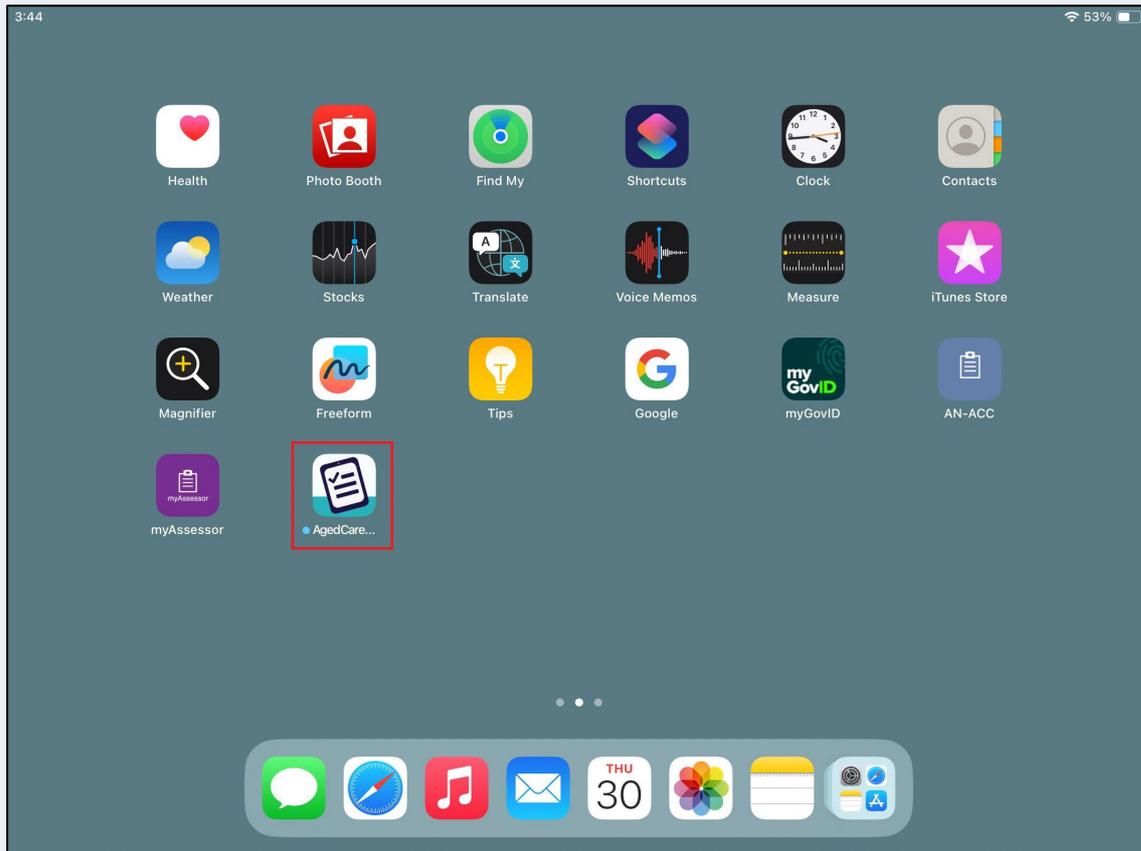
Select **Get Activation Code** to send an activation code to your registered email address.



2. Click **Activate** to generate the code.

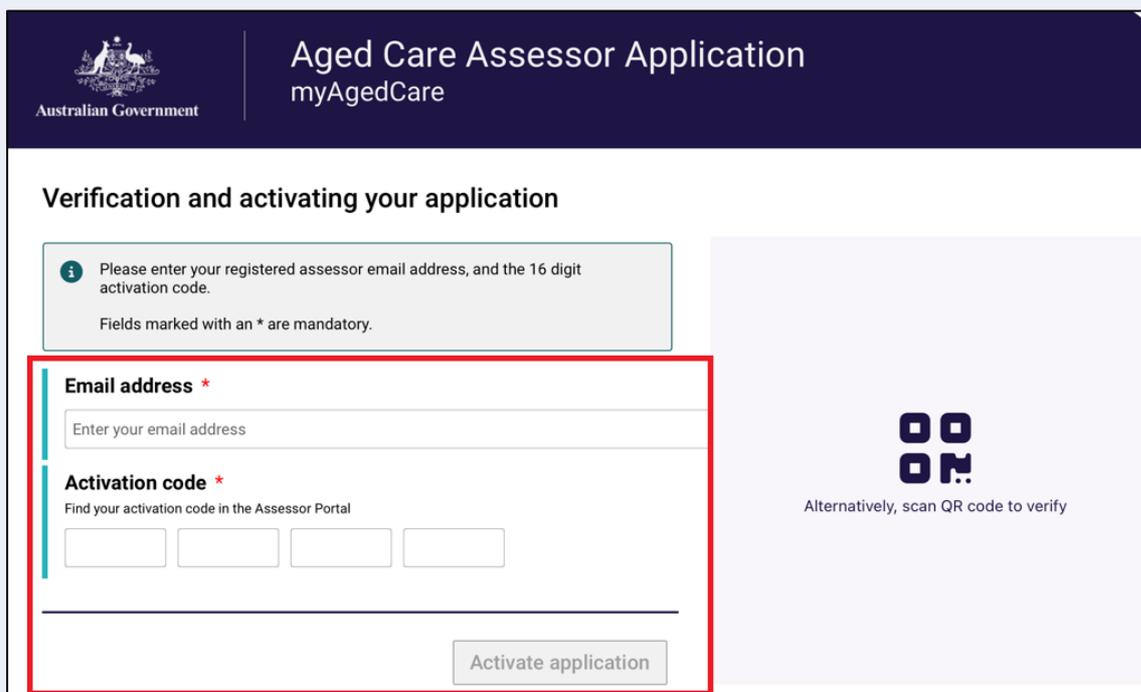


3. Open the App from your device.



4. A login page will display and remind users they must be a registered needs assessor and/or RAC funding assessor with My Aged Care and have an activation code obtained from either the assessor portal or the My Aged Care service provider and assessor helpline.

5. Enter the email address associated with your staff account in the Assessor Portal and your activation code, and then select **Activate**.



Alternatively, you can scan the QR code that was displayed from the Assessor Portal by selecting **Scan QR Code**.

1800 836 799 Mon-Fri 8am - 8pm Sat 10am - 2pm Welcome Unrestricted 1

Assessor Portal My Dashboard Organisation administration Find a service provider Residential Funding Portals AN-ACC app Aged Care Assessor app Reports and documents Tasks and notifications My Aged Care interactions Logout

Home | Aged Care Assessor App

Aged Care Assessor App

Get Activation Code

Your Aged Care Assessor app activation code is:
09F7-9D43-917D-
Alternatively, select the 'Scan QR Code' button in your Aged Care Assessor app to scan the QR code below to activate access.

ACTIVATE AGED CARE ASSESSOR APP

Where can I get the app?
The Aged Care Assessor app is available from the following stores:
Microsoft App Store Google Play

! The email entered will be verified against the information held in My Aged Care. If the information is incorrect, an error message will be displayed.

6. The **Terms of Use** will be displayed.

Read the Terms and Conditions and if you agree, select the **Accept terms and continue** button, to proceed.

If you do not accept, you will not be able to use the App.

Australian Government

Aged Care Assessor Application myAgedCare

AGED CARE ASSESSOR APP TERMS OF USE

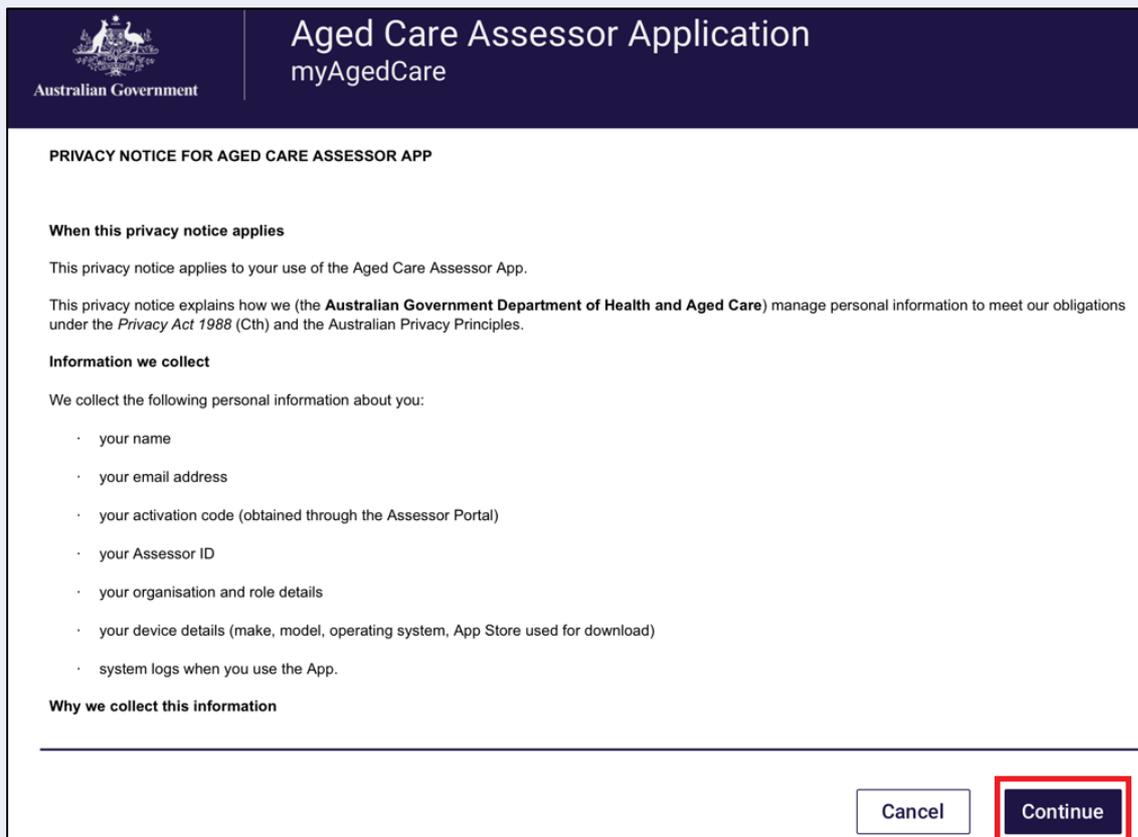
This license is for the use of the "Aged Care Assessor" mobile app (**App**) and is between the person who downloads the App (**You**) and the Commonwealth of Australia acting through the Department of Health and Aged Care ABN 83 605 426 759 (**Department**). Your use of the App is subject to Your agreement to these terms.

- License terms** : The App is licensed by the Department to You in accordance with these terms, and all notices and other instructions provided by us from time to time. If You are entering into these terms as an employee of an organisation, You warrant and agree that You are authorised by Your employer to agree to these terms and bind Your employer.
- License parties** : This license is between the Department and You only, and not with any other person or the App publisher (Apple, Google or Microsoft as the case may be). Subject to the terms of this license, and excluding the data inputted by You into the App, the Department is solely responsible for the App and its content. The Department reserves all rights not expressly granted to You.
- Description of App**: The service provided by the App allows You to: (i) collect for the Department certain assessment information from aged care residents, care providers, and residents' families and friends for aged care needs and funding assessment purposes as authorised by Your role and input the responses into an assessment tool within the App; and (ii) upload completed assessments via the App to the Department's secure IT systems. You acknowledge that: (iii) the App may not be compatible with certain devices and operating systems; and (iv) while the Department endeavours to ensure that the App is free from viruses and other harmful code, this cannot be guaranteed.
- Scope of license** : The license granted to You by the Department is limited to a non-exclusive, non-transferable license to use the App on the device that You download it to.
- License restrictions**: This license does not allow You to: (i) use the App on any device that You do not own or control; (ii) distribute or make the App available over a network where it could be used by multiple devices at the same time; (iii) rent, lease, sell or sublicense the App or any information contained within the App; (iv) copy (except as expressly permitted by this license and any App publisher terms), decompile, reverse engineer or modify the App (except to the extent permitted by law); (v) access or use the App in breach of any laws or for any unlawful purpose; (vi) distribute viruses, spyware or any other similar software that may damage the operation of any hardware or software; (vii) collect or store personal data about other users of the App; (viii) submit any documentation or information which is irrelevant or in excess of the requests for information contained within the App; or (ix) upload any harmful code (including any viruses, worms or Trojan horses) or otherwise disrupt or

Cancel Accept terms and continue



7. Once you have accepted the terms, the Privacy notice for the App will appear. Read the notice and if you agree, select the **Continue** button, to proceed.



PRIVACY NOTICE FOR AGED CARE ASSESSOR APP

When this privacy notice applies

This privacy notice applies to your use of the Aged Care Assessor App.

This privacy notice explains how we (the **Australian Government Department of Health and Aged Care**) manage personal information to meet our obligations under the *Privacy Act 1988* (Cth) and the Australian Privacy Principles.

Information we collect

We collect the following personal information about you:

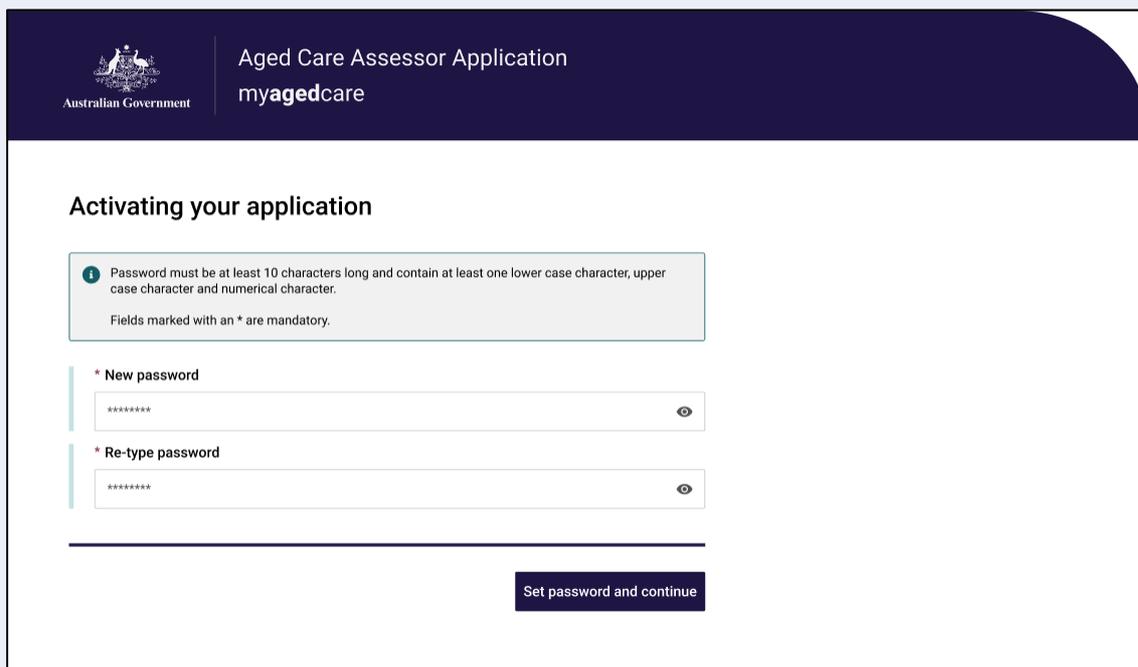
- your name
- your email address
- your activation code (obtained through the Assessor Portal)
- your Assessor ID
- your organisation and role details
- your device details (make, model, operating system, App Store used for download)
- system logs when you use the App.

Why we collect this information

Cancel Continue

8. Once the App's Terms of Use has been accepted, you will be presented with the password screen. Create a password according to the rules displayed. You will be asked to enter the password a second time to ensure it is correct.

Use this password to unlock the App each time it is opened.



Activating your application

i Password must be at least 10 characters long and contain at least one lower case character, upper case character and numerical character.
Fields marked with an * are mandatory.

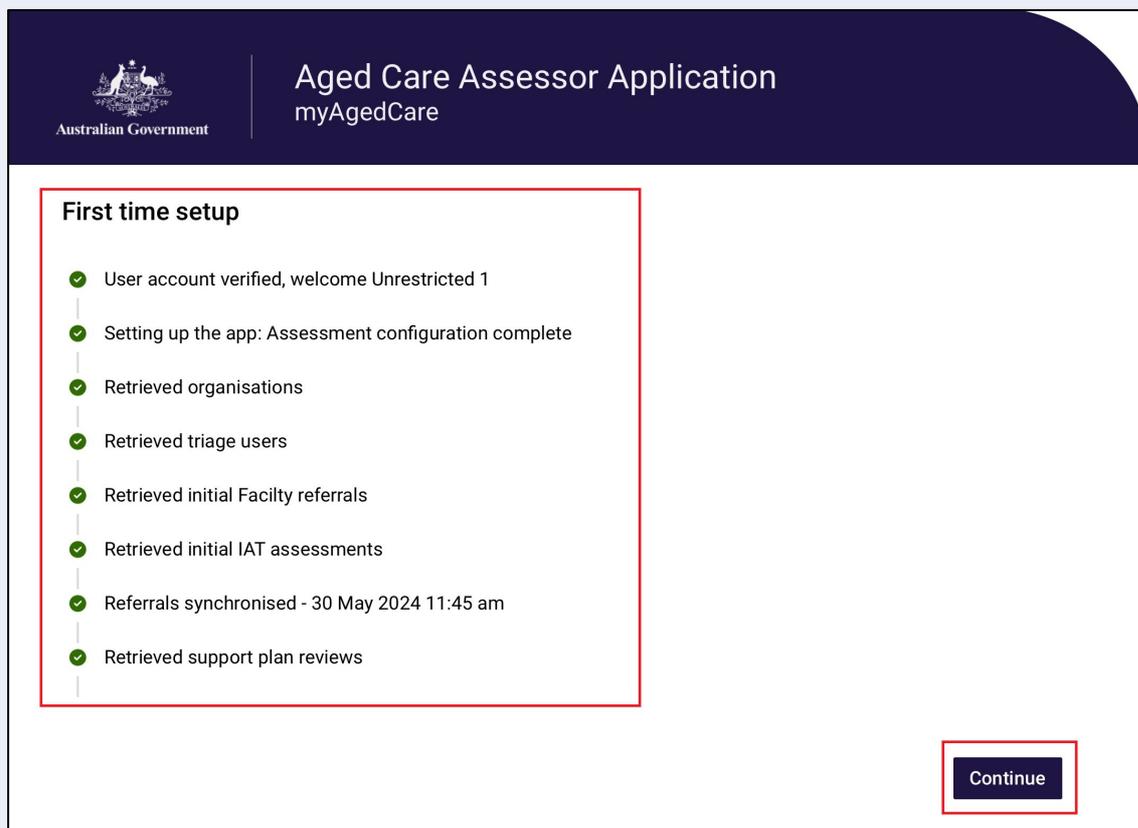
* New password

* Re-type password

Set password and continue

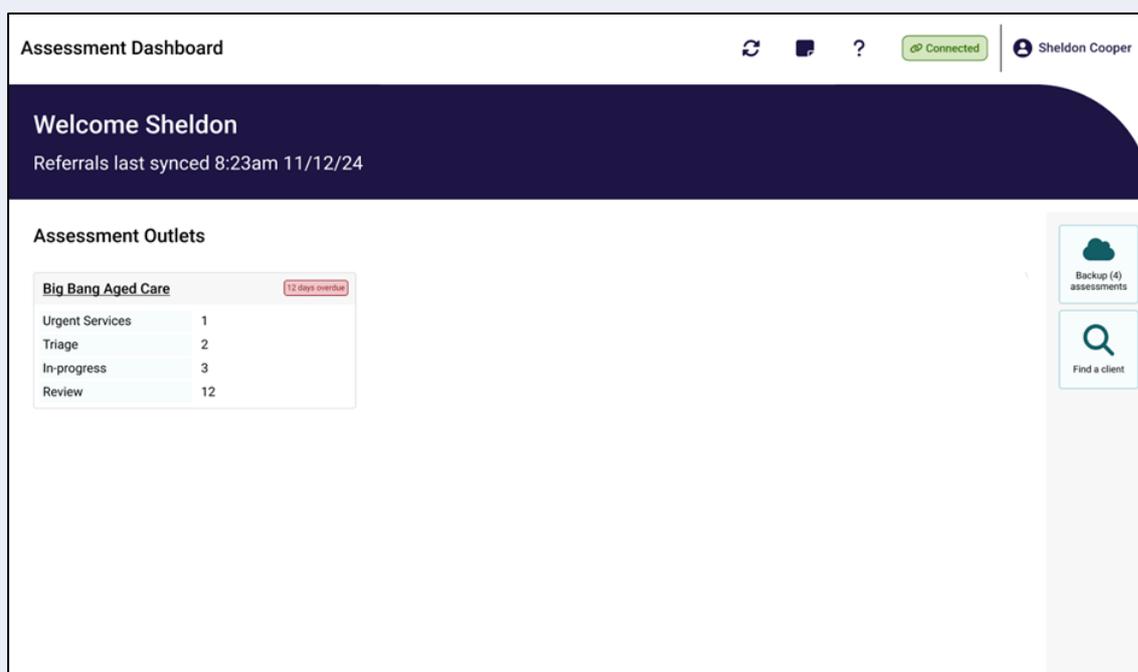


9. After setting your new password, the App will complete a first time setup such as your profile and your assessment organisations information. Click the **Continue** button to complete the login steps.



10. You have now successfully completed the activation process. The next time you sign in to the App, follow the steps outlined below in the [Signing in to the App after activation](#) section.

11. Once signed in the App dashboard will be displayed.



! The first time you log in to the App you may not see any referrals.

Select **Refresh referrals** to load assessment referrals assigned to you.

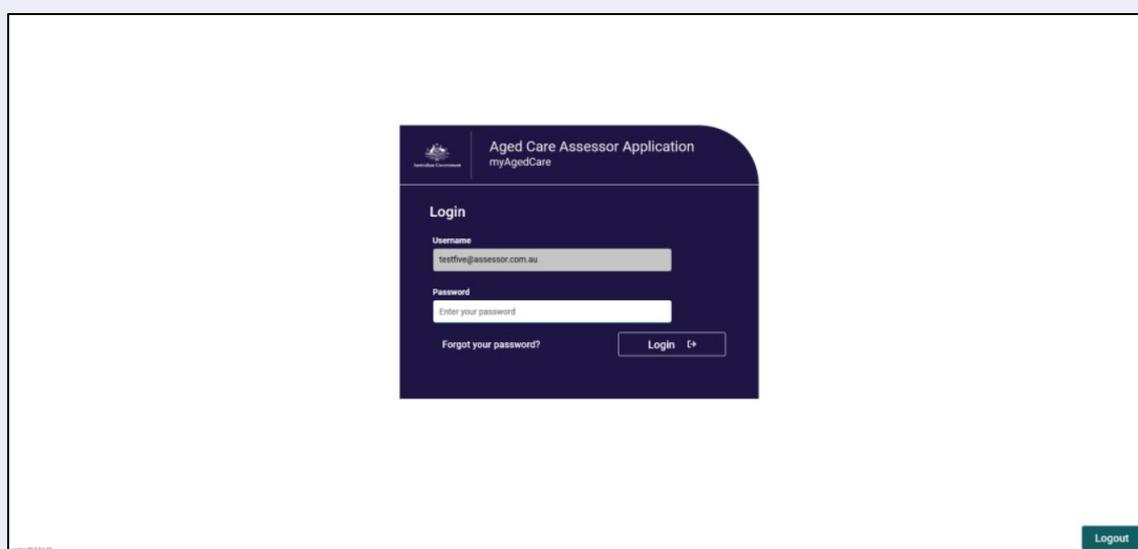
If you experience issues with refreshing referrals, follow the steps in [App troubleshooting and diagnostics](#) to diagnose issues experienced with the App.

5. Signing into the App after activation

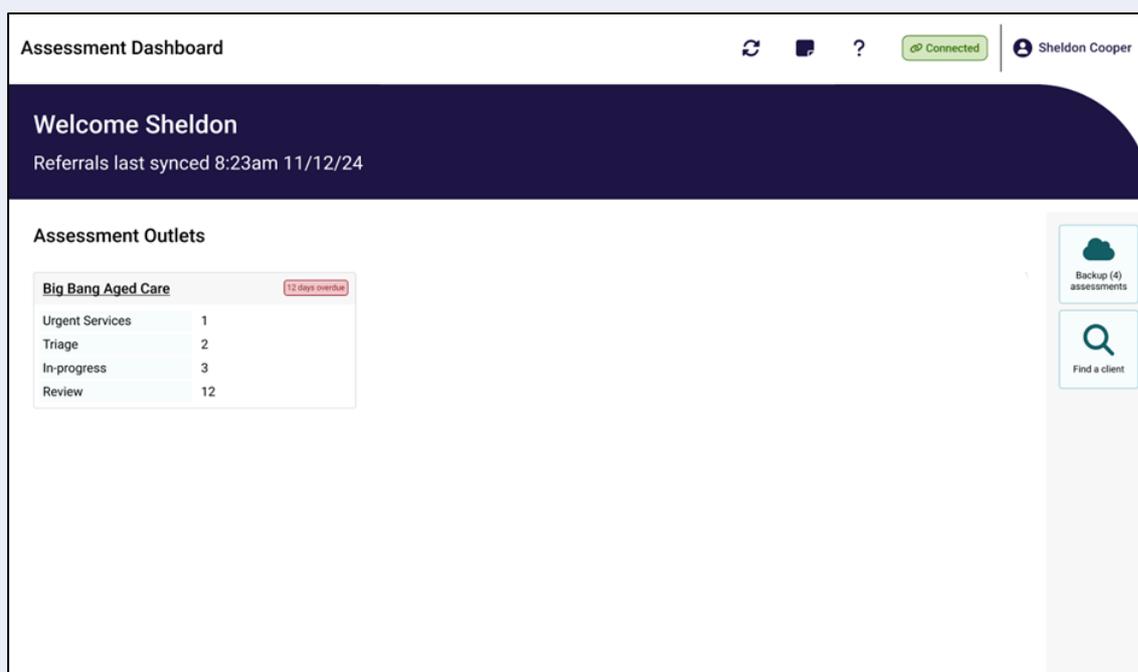
To sign into the App after the first-time activation process, follow the steps below.

1. Open the App from your device. The password page will display, and you will be prompted to enter your password.

The App will timeout if inactive for 15 minutes and you will need to log in again.



2. The dashboard will be displayed.



Assessment Outlets	
Big Bang Aged Care 12 days overdue	
Urgent Services	1
Triage	2
In-progress	3
Review	12



! You will be locked out of the App if you forget your password, enter your password incorrectly five times, or do not use the App for 14 days.

You can regain access in the App section of the assessor portal.

To do so, select **Generate an Unlock Code** to generate a code within the assessor portal. Enter this code into your device and you will then be able to reset your password and log in.

GENERATE AN UNLOCK CODE

If the portal is unavailable, you can also call the My Aged Care service provider and assessor helpline on 1800 836 799 to generate an unlock code.

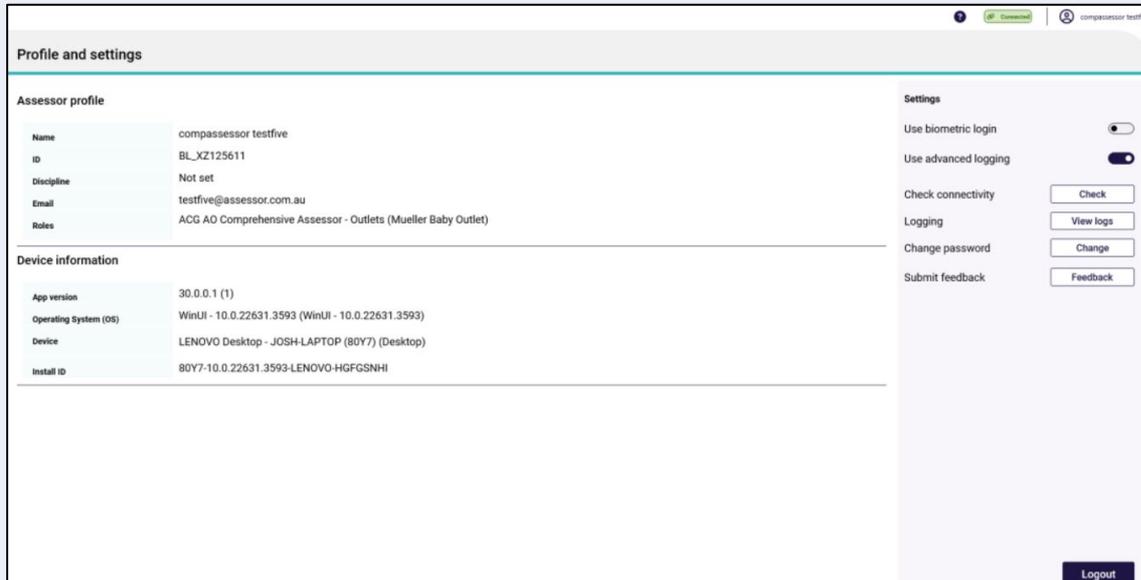
6. Aged Care Assessor App troubleshooting and diagnostics

The troubleshooting and diagnostics functionality assists the My Aged Care service provider and assessor helpline with diagnosis and resolution of issues in coordination with the support teams in the Department of Health and Aged Care.

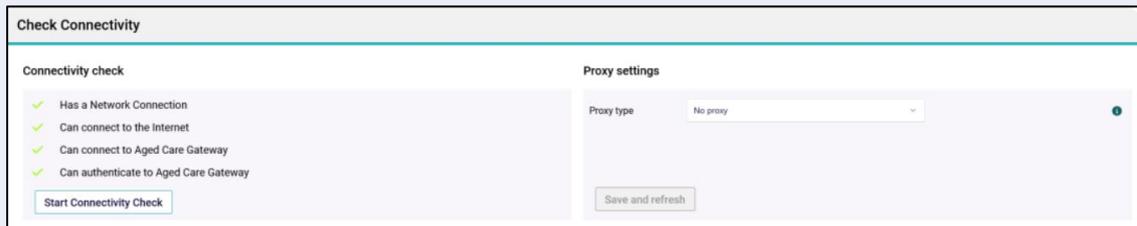
These functions are accessed from the **Profile** icon on top of the navigation menu.



Information about the current downloaded version of the Aged App is displayed, and assessors can also **Check connectivity**, **View logs**, **Share logs** or **Submit feedback** from this screen.



If you experience connection issues whilst using the App, you can check for issues by selecting **Check connectivity**. Any connection issues will be displayed. There are also quick suggestions provided to help with connectivity issues. Proxy settings can also be updated if it is a requirement from your Organisation.



If you experience technical issues whilst using the App, you can choose to share your App device logs and diagnostics.

This will assist the support teams to more easily identify, analyse, diagnose and resolve any issues.

The logs contain detailed information regarding the specific problem, and traceable steps that have been taken to reach the problem point.

This information will be able to be accessed by the Department of Health and Aged Care for diagnosis.



6.1 Inactivity time-out

The App will timeout if there is no activity for 5 minutes and you will be required to login to the app again. Provided you have been working in an online mode, all data you have been working on will be auto-saved every 15 minutes. If you are working in offline mode and are logged out of the app due to inactivity, data you have entered will not be backed up to My Aged Care but will be available on the device still.

6.2 Uninstall the App

If you experience any issues with the App, you may be instructed to uninstall and then reinstall the App. The steps for uninstalling an App will be dependent on the operating system you use.

Android

1. Touch and hold the App icon
2. Tap **App Info**
3. Tap **Uninstall** and confirm the prompt

iOS

1. Touch and hold the App
2. Tap **Remove App**
3. Tap **Delete App**, then tap **Delete** to confirm.



Windows 10+

1. Select Start and look for the app or program in the list shown.
2. Press and hold (or right-click) on the App, then select **Uninstall**.

6.3 First time access following a reinstall of the App

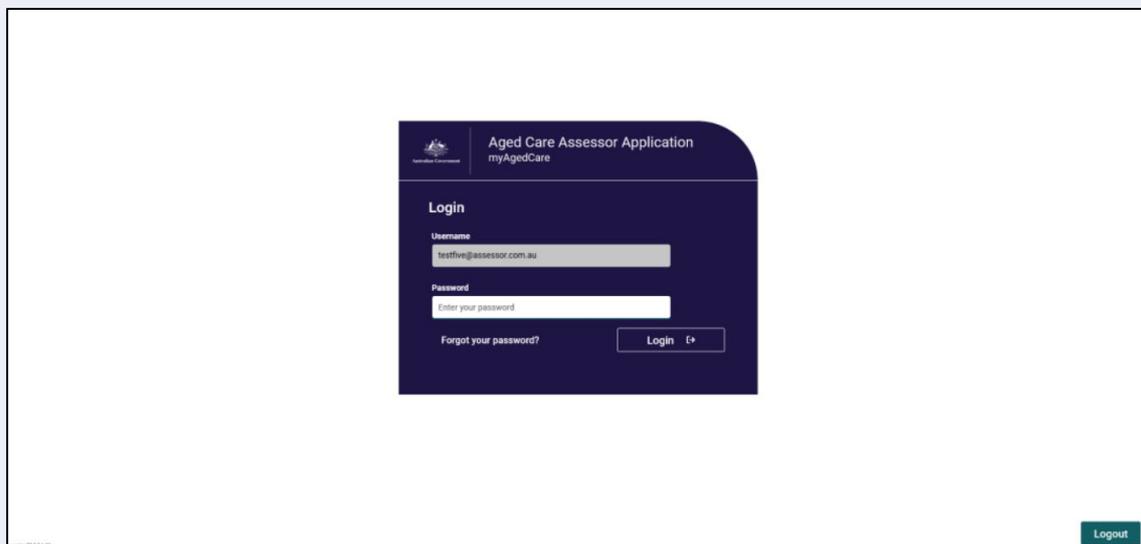
If you wish to reinstall the App after uninstalling, you will need to activate your App status again. To do this please refer to [4. Activating the App](#) for these steps.

7. Launching and closing the App

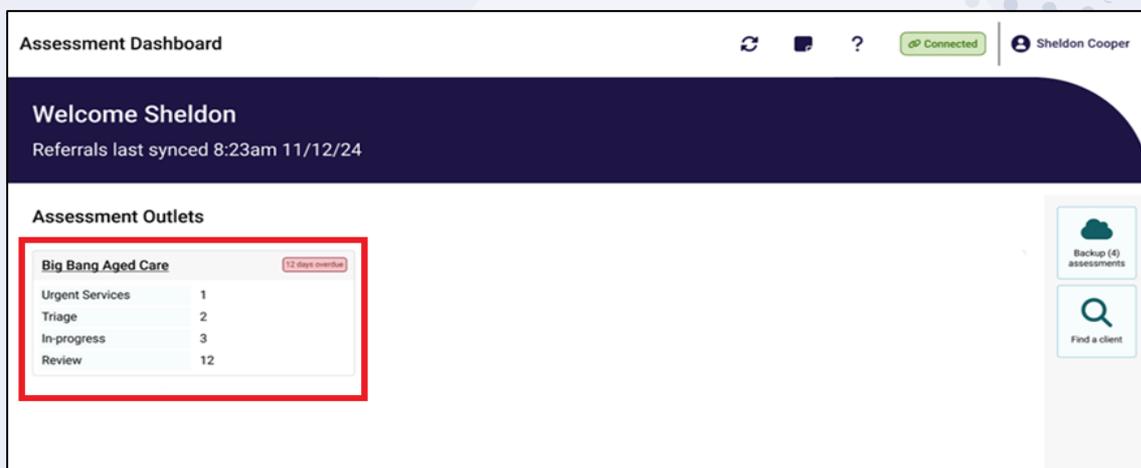
7.1 Launching the App

To launch the App after the first-time activation process you should:

1. Open the App from your device. The password page will display, and you will be prompted to enter your password and then click **Login**.



2. The Dashboard will be displayed, and you will see the list of outlets or facilities that you have been assigned to assess. If you have any assessments assigned to you then you will also see these under the related outlet or facility.



7.2 Closing the App

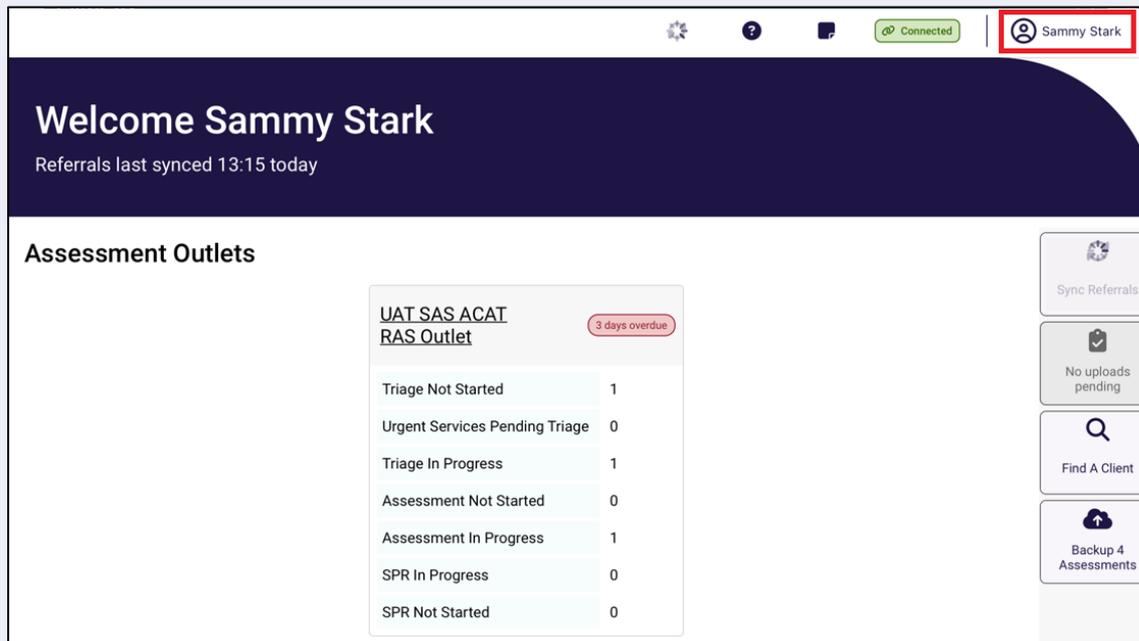
To close the App, you can either navigate to the top right of the screen and close the App window (Windows), or

Swipe up from the bottom of your screen (most iOS and Android versions).

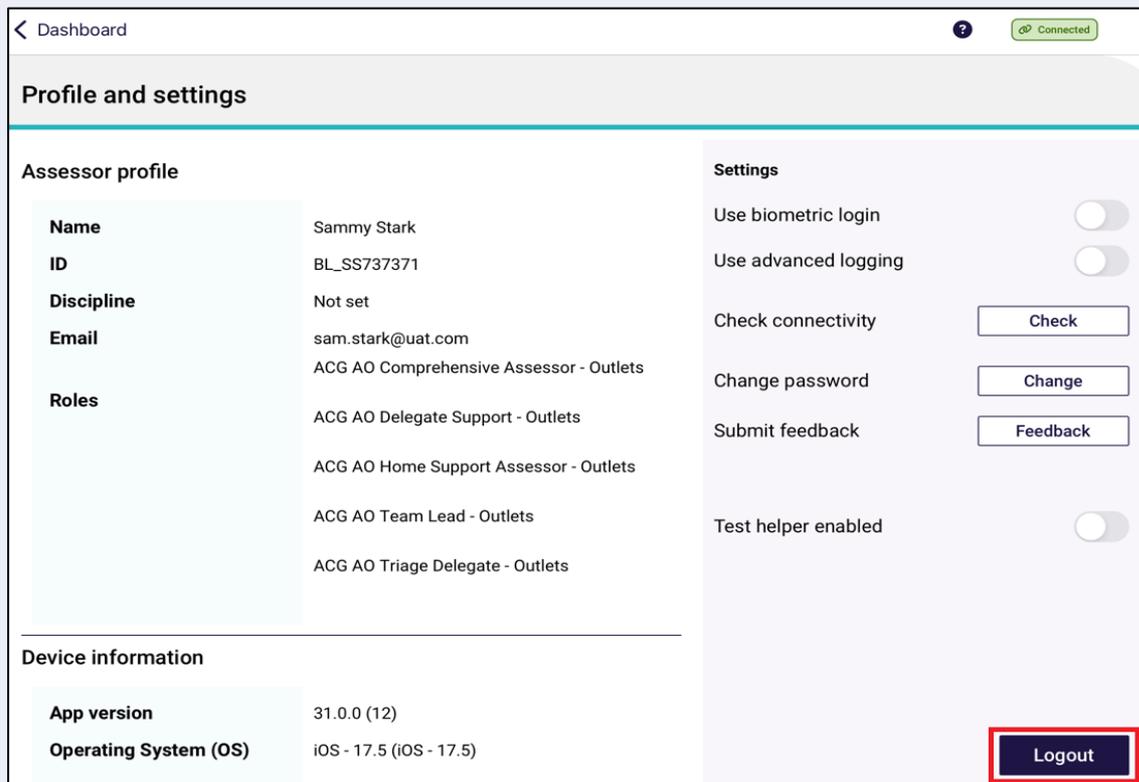
7.3 Logging out of the App

This will remove your current activation and will require a new code to be entered.

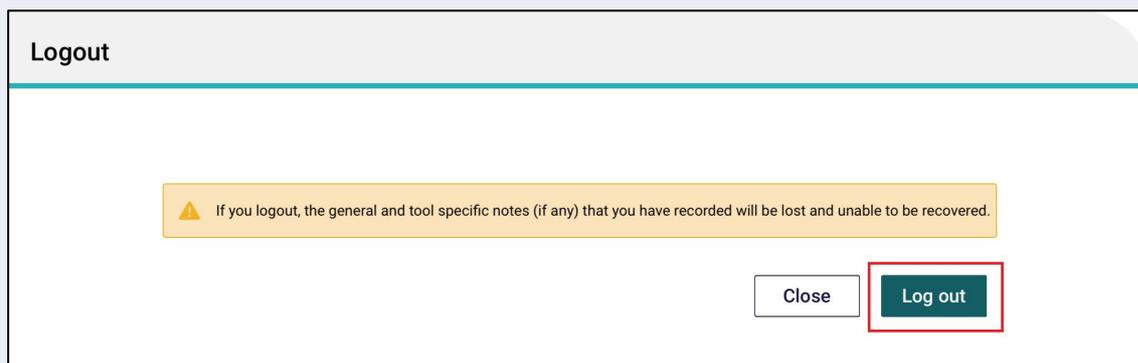
1. Select your profile button from the dashboard menu screen.



2. Select the **Logout** button.

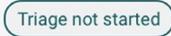
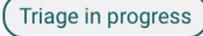
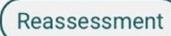
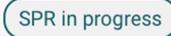
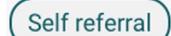
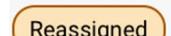
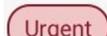
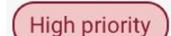
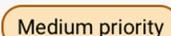


3. Confirm that you wish to logout.



8. App symbols

Symbol	Definition
	Sync - Starts a sync to gather user profile data and assigned referrals. Use this if after a few minutes on first log in you still do not see any referrals.
	No uploads pending – means that there are no assessments that are pending to be uploaded via the internet. Click this to upload referrals when they are in Completed status.
	Find a Client – Opens the Find a Client page to initiate a search.
	Backup Assessment – click this button to backup all assessments.
	Quick Notes – Opens the Quick Notes page to quickly access a free text field for general purpose comments. feature, which allows notes to be recorded on the App.
	Help and Support - Shows links to Aged Care Assessor App User Guide, My Aged Care Assessment Manual, AT User Guide, Terms of Use and Privacy.
 Unrestricted 1 UAT	Profile and settings – view your profile, settings and connectivity.
	Connected – mean that you have connectivity to the internet. You are in an online state.
	Not connected - mean that you do not have connectivity to the internet. You are in an offline state. App is limited to offline functions.
	Not started – indicates that the assessment has not commenced.

	Triage not started – indicates that triage has not commenced.
	Triage in progress – indicated that the assessment referral has entered the stage of triage.
	Reassessment – indicates that the assessment referral is a reassessment.
 	In progress or Assessment in progress - indicates that the assessment has been started and not completed.
	SPR in progress – indicates that the Support Plan Review has been started.
	Self referral – indicates that the assessment referral is a self-referral that you have referred to yourself.
	Client matched – indicates that you have matched an offline client to an existing client once you have regained internet connection.
	Reassigned – indicates that the assessment referral has been reassigned in the Assessor portal to another user.
   	Priority – depending on the client care needs, a priority for assessment is set.
	Clear answers or page information – Selecting Clear page information will clear any information entered on the current page of the assessment that the assessor is working on.
	Help - Displays more detailed information about that page or tool.
 or 	More information – in certain areas within the app, these icons will appear to provide further information on particular questions.
 or 	Assessor comments or Quick notes is a feature, which allows notes to be recorded on the App. These notes could be sensitive in nature or may be notes that are for later reference during the assessment process.
	Double Chevrons – these will allow you to open the side panel.

	Requires action – indicates that the section of the assessment is incomplete.
	Complete – indicated that the section of the assessment is completed.
	Download assessment – Indicates that the assessment had not been downloaded to the device yet. When downloaded, this icon will disappear.
	Upload assessment – this will upload the assessment to the My Aged Care Assessor Portal.
	Online Client - When an assessment has been matched online
	Offline Client – When an assessment is created offline and is not matched.
	Error uploading – there has been an error during the uploading of the assessment referral.

Part B - IAT Assessments

! Please note that ‘assessment’ in part B refers to aged care needs assessments completed by aged care needs assessors who complete assessments using the Integrated Assessment Tool (IAT).

9. Registering a client, self-referring for assessment, starting triage and starting a review

Needs assessors can register a new client within the App.

You must be connected to the internet to view and perform any of the functions referenced below.

If you are not connected to the internet, follow the steps to [Create an offline client](#).

Following online client registration:

- Needs assessors can [self-refer clients for assessment](#) if the reason for assessment is In-hospital, remote assessment, First Nations, Homeless or at risk of, or the client is considered vulnerable.
- Referrals for reason outside of those listed above must be facilitated prior to linking to the registered client (refer to [Linking offline clients and assessments](#)).

! The following functionalities cannot be completed offline:

- Registering clients (online)
- self-referring for assessment
- downloading a client’s referral for assessment
- uploading assessment information to the My Aged Care assessor portal
- sharing device log data to the Department.

Once the needs assessor has internet connectivity, client assessment and support plan information can be uploaded to the assessor portal.

The needs assessor can then submit to the delegate for approval (where necessary) or continue to match and refer, sending any necessary referrals for service. The client's consent must be obtained prior to any referrals being sent.

The App also enables needs assessors to register a person who may not have previously registered with My Aged Care and conduct an assessment.



These functions are available in the assessor portal, please refer to:

[My Aged Care – Assessor Portal User Guide 1 – Registering and referring clients.](#)

9.1 Finding a client

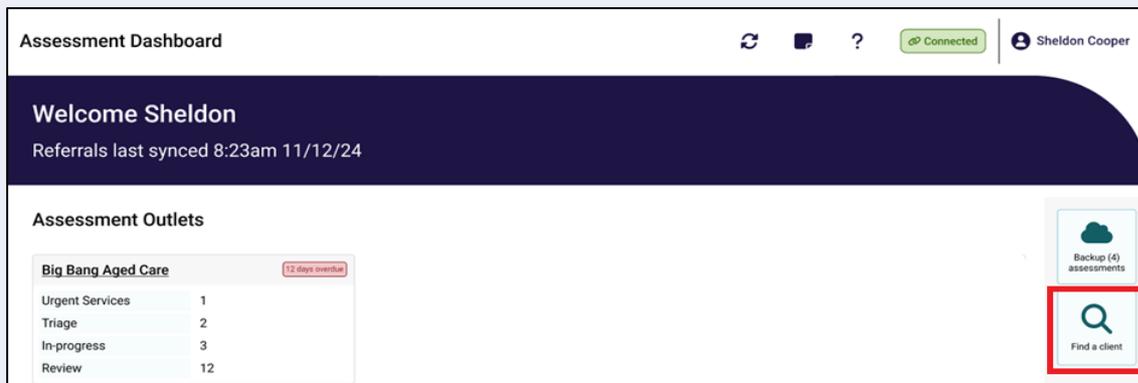
Before you register a person, you need to confirm that they do not already have a client record.



If you are not connected to the internet, the **Find a client** function will not be available, and you can follow the steps in the **Adding an offline client** section to create a client via the **Create Offline Client** functionality.

You will then need register the client or link to an existing client when connected back to the internet.

1. Select **Find a client** from the dashboard of the App.



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

Before registering a new client, check the client exists

Client search

First name: Leonard
Last name: Hoff
Aged Care ID: Example AC12345678

> Advanced search

Search

Results 2 results found - search again, select an existing client or register a new client. Register a new client



You can select **Advanced search** to conduct a custom or refined search.

Find a client

Before registering a new client, check the client exists

Client search

First name: Leonard, Last name: Hoff, Aged Care ID: Example AC12345678

Advanced search

Preferred name: [empty], Date of birth: dd/mm/yyyy, Status: Select a status

Suburb: [empty], State: Select a state

Medicare card number: [empty], Department of Veterans Affairs (DVA) number: [empty], Centrelink Customer Reference number (CRN): [empty]

Aged Care Management Payment System (ACMPS) number: [empty], System for the Payment of Aged Residential Care (SPARC) number: [empty]

Search

3. Any matching search results will be displayed.

Results 2 results found - search again, select an existing client or register a new client. Register a new client

Client Name	Status	Location	Aged Care ID	Phone	Clinical intervention due
Leonard Hofstadter	Active	Pasadena, NSW, 2157	AC12345678	02 5837 2812	18/9/2023 (14 days)
Leonard Hofstadter	In-active	Pasadena, NSW, 2157	AC12345672	04 1747 1839	-

4. If there is already an existing client record, select the appropriate record and continue from [Self-referring for assessment](#) to create a referral.

If there are **No records found** or the client record searched for is not returned in the search results, you can select **Register a new client**.

Find a client

Before registering a new client, check the client exists

Check client exists

First name: Leonard, Last name: Hoff, Aged Care ID: Example AC12345678

Search

No records found Register a new client



9.2 Registering a client

To register a new client in the App, follow the steps below. You must be connected to the internet.

1. On the **Personal details** page, enter the client's personal information.
Fill out all mandatory fields. These are shown by red asterix next to the field, red boxes provide advice on what information is required.

← Find a client

Refresh, Home, Help, Connected, Sheldon Cooper

Register a client

Fields marked with an * are mandatory

Title
Optional, select a title

*** First name**

Middle name

*** Last name**

*** Gender**
Select a gender

*** Date of birth or estimated age**
Please enter the date of birth. If not known, enter the client's estimated age.

Date of birth Estimated age

2. On the **Address details** page, you can search for the client's address.
If the client's address is not available from the drop-down list, you can select to enter the address manually.

Address

*** Does the client have a home address?**
Yes No

*** Address lookup**
Search for and select the address

[Can't find the address? Enter it manually...](#)

Building name
Example, 8 Furzer Street

Unit type (Select a type) **Unit number**

Floor type (Select a type) **Floor number**

*** Street number type** (Select a type) *** Street number**

*** Street type** (Select a type) **Street type suffix**

*** Street name**

*** Suburb or City**

*** State or Territory** (Select a region) *** Postcode** *** Country** (Select a region)



! While you are entering client information in the **Personal details**, **Address details** and **Identity Match/Consent** sections, the App will check in real time for potential duplicate records.

See [Potential Duplicates](#) for more details.

3. On the **Identity Match** page, enter in any Government ID information that the client has provided. Once all mandatory client information has been entered, select **Continue**.

The screenshot shows the 'Register a client' screen. At the top, it says '3:01PM Tue 17 Sep' and 'Sammy Stark' is logged in. The main heading is 'Register a client'. Below this, there are two sections: 'Identity Match' and 'Government IDs'.
Identity Match: A blue vertical bar is on the left. Text: 'To verify this person's identity with the Medicare System, please provide their Medicare Number. This will enable Identity Match to occur.' Question: 'Does this person have a Medicare Card Number?*' with 'Yes' and 'No' buttons. Below are two input fields: 'Medicare card number' and 'Individual reference number'. A red error message says '* Please enter a valid Medicare number'.
Government IDs: Text: 'These government IDs will assist us with retrieving existing care approvals from DHS (if there are any).' Question: 'Does this person have government IDs?*' with 'Yes' and 'No' buttons. Below is an input field for 'Aged Care Management Payment System (ACMPS) number'.

4. You will be required to confirm the client's consent to be registered with My Aged Care.

The screenshot shows the 'Register a client' screen with a 'Consent' modal dialog box overlaid. The background is dimmed. The modal has the title 'Consent' and the question 'Has the client consented to register?' with 'Yes' and 'No' buttons. Below the modal are 'Register' and 'Cancel' buttons. The background form shows the 'Consent to send SMS and emails about the client' section with 'Yes' and 'No' buttons. The 'Address details' section has the question 'Does the client have a home address?*' with 'Yes' and 'No' buttons. The 'Identity Match' section has the question 'Does the person have a Medicare Card Number?*' with 'Yes' and 'No' buttons. The 'Government IDs' section has the question 'Does the person have government IDs?*' with 'Yes' and 'No' buttons. A 'Register' button is visible at the bottom right of the background form.

! The **Register** button will not be enabled until all mandatory client information has been entered on the **Personal details**, **Address details** and **Identity Match** pages.



If registration is successful, you will be taken to the **Client details** page.

The screenshot shows the 'Daniel Radcliffe's Details' page. On the left is a navigation menu with 'About', 'Event Summary and Approvals', and 'Refer for Assessment'. The main content area is divided into several sections: 'Personal Information' (Born 1st July 1968), 'Communication requirements' (No communication requirements provided), 'Identity documents (ID)' (Medicare, DVA, CRN, ACPMS, SPARC ID, Aged Care ID: AC96591342), 'Identity status' (Not Attempted), 'Health Insurance' (No health insurance provided), and 'Address details' (Home address, Service delivery address, and Send any correspondence to: all showing 'No address found').

9.3 Potential Duplicates

While you are entering client information prior to registration, the App will check for any potential duplicates.

Select **Review duplicate clients** to view the possible matching client records.

! If there are any potential duplicate matches found, you will be required to view these records prior to registering the new client to avoid creating a duplicate client record in My Aged Care.

The screenshot shows the 'Find a client' page. At the top left is a 'Find a client' button. The top right contains navigation icons and a 'Connected' status for Sheldon Cooper. Below the navigation is a 'Register a client' header. A prominent yellow warning banner at the bottom states 'Potential duplicate clients have been identified.' with a 'Review duplicate clients' button.

The list of potential duplicate matches will be displayed on the left side of the screen in list view (see screenshot below). Select each record to see a visual comparison of client details against the client record being registered.

← Leonard Hofsteader Refresh Print Help Connected Sheldon Cooper

Review potential duplicate client

Client details

- Leonard Hoffsteader
- Leo Hoffstead

New client		Existing client	
Title		Title	Mr
First name	Leonard	First name	Leonard
Last name	Hoffsteader	Last name	Hoffsteader
Date of birth	16 October 1962	Date of birth	16 October 1962
Home phone		Home phone	
Mobile	0418 821 812	Mobile	0418 821 812
Email	leonard.hoffsteader@bigbang.com	Email	leonard.hoffsteader@bigbang.com
Address	8 Furzer St, Woden Town Centre ACT 2606	Address	8 Furzer St, Woden Town Centre ACT 2606
Medicare		Medicare	
DVA number		DVA number	
CRN		CRN	
ACMPS		ACMPS	

If you choose to **Use new record**, continue to [Self-referring for assessment](#) or facilitate a referral for assessment.

If none of the potential duplicate matches are the client you are registering, select **Use the record being registered** to complete the registration process.

! It is important to view any potential duplicate records prior to registering a new client to prevent the creation of duplicate client records in My Aged Care.

9.4 Self-referring for assessment

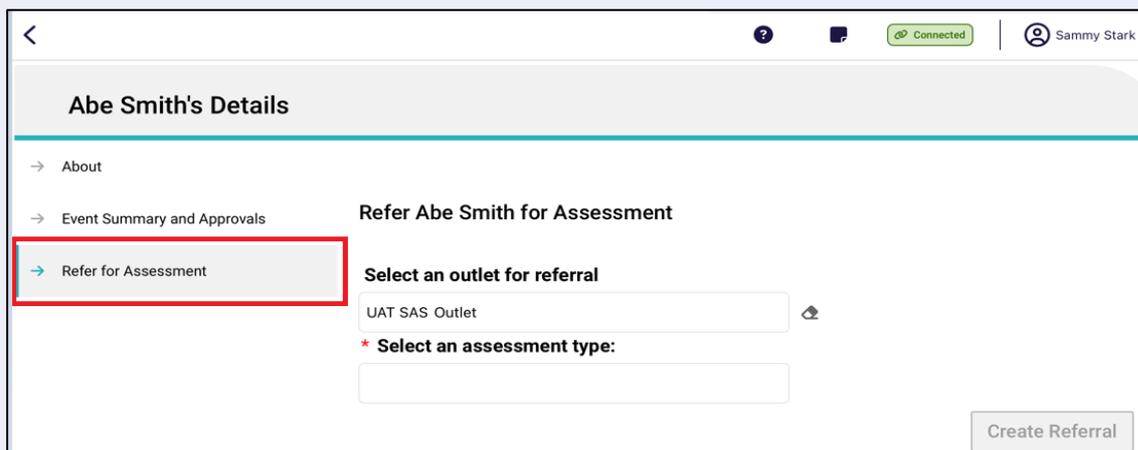
When you self-refer a client for assessment in the App, the client's referral will be assigned to you. You must be connected to the internet.

! Needs assessors can only self-refer clients if they are:

- In hospital
- Conducting a remote assessment
- First Nations; or
- Homeless or at risk of
- Vulnerable groups

If the client is not being self-referred for one of these reasons, the Needs assessor must facilitate a referral by contacting the My Aged Care service provider and assessor helpline on 1800 836 799.

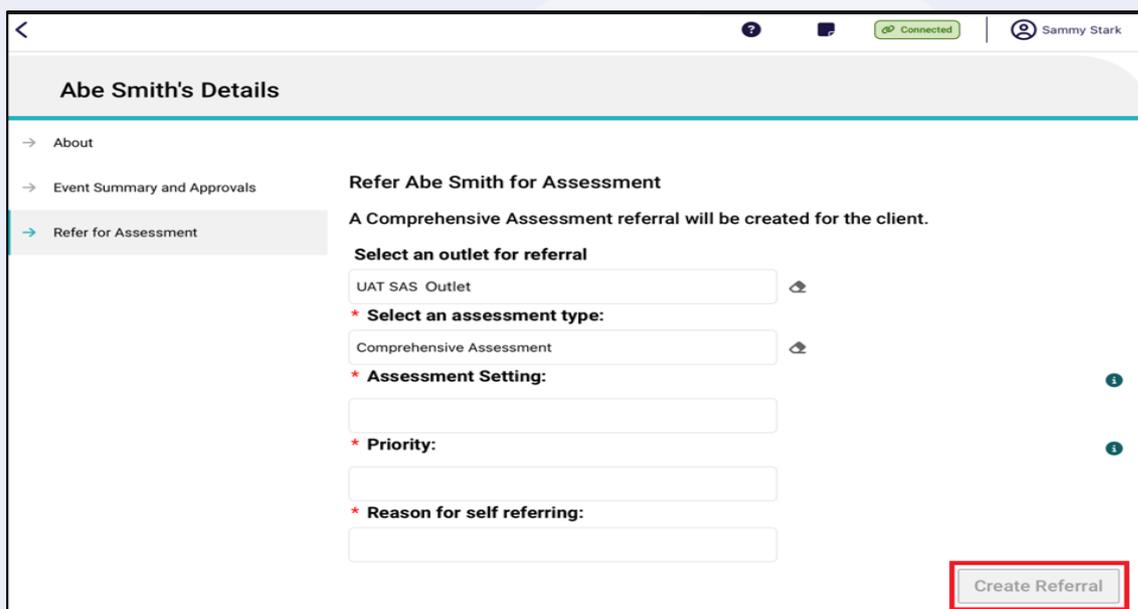
1. When you have found or registered the client you wish to self-refer for an assessment, select **Refer for assessment** from the client's record in the App.



The screenshot shows the 'Abe Smith's Details' page in the app. The 'Refer for Assessment' option in the sidebar is highlighted with a red box. The main form area is titled 'Refer Abe Smith for Assessment'. It contains the following fields:

- 'Select an outlet for referral' with a dropdown menu showing 'UAT SAS Outlet'.
- '* Select an assessment type:' with an empty dropdown menu.
- A 'Create Referral' button at the bottom right.

2. Select the outlet that the assessment will be associated to (if you are assigned to multiple outlets), and the assessment type. Depending on the assessment type selected additional information may be required such as the assessment setting, priority, assessment date and reason for self-referral. Once all information has been entered select **Create referral**.



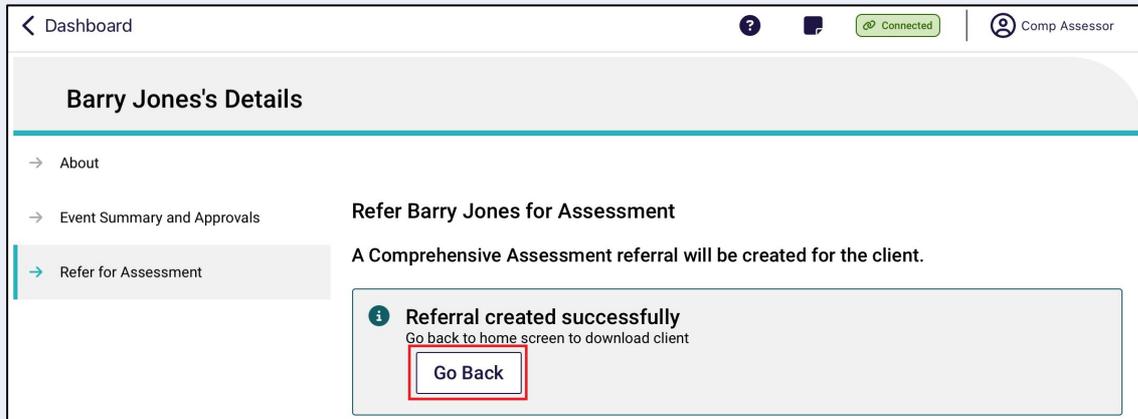
The screenshot shows the 'Abe Smith's Details' page in the app. The 'Refer for Assessment' option in the sidebar is highlighted with a red box. The main form area is titled 'Refer Abe Smith for Assessment'. It contains the following fields:

- 'Select an outlet for referral' with a dropdown menu showing 'UAT SAS Outlet'.
- '* Select an assessment type:' with a dropdown menu showing 'Comprehensive Assessment'.
- '* Assessment Setting:' with an empty text input field.
- '* Priority:' with an empty text input field.
- '* Reason for self referring:' with an empty text input field.
- A 'Create Referral' button at the bottom right, which is highlighted with a red box.



! If the client is undergoing an assessment, an error message will be displayed, and you will be unable to refer the client for the assessment.

3. If the referral is created successfully, you can select **Go Back** to go to the Dashboard to download the client's record.

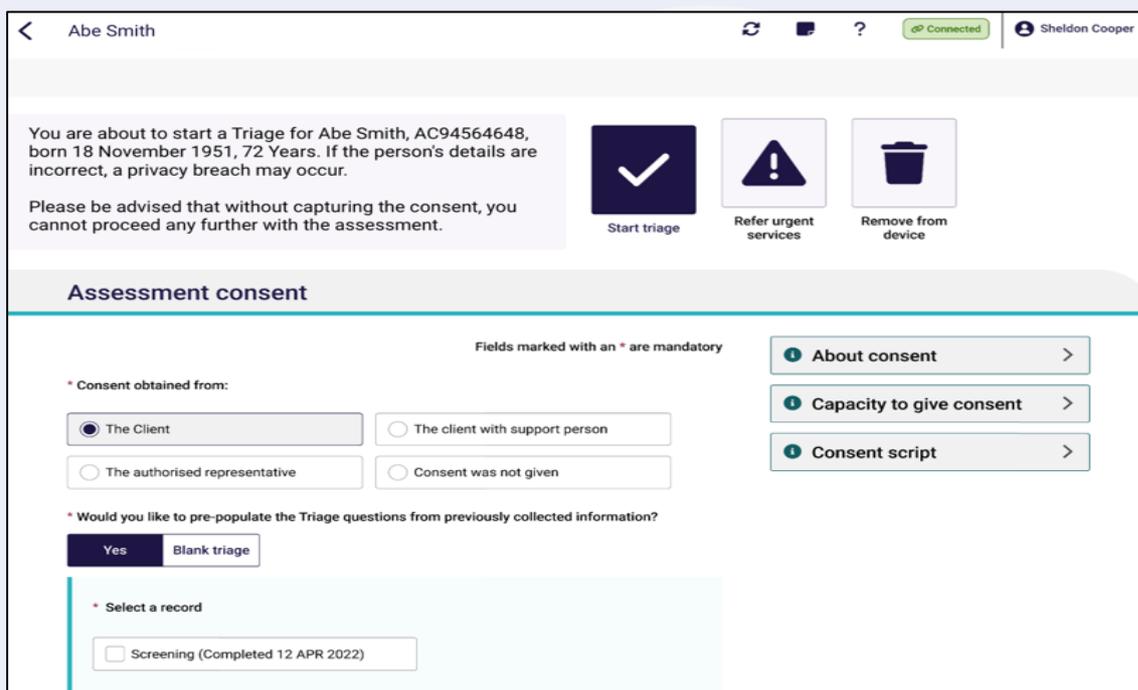


9.5 Starting Triage questions with consent for a client using the IAT (Self-Referral)

1. Before commencing an assessment, you will be required to gain consent to complete the Triage questions with the client.
2. Self-Referrals will require the Triage questions to be completed by a Triage Delegate. If you are not a Triage Delegate, you will be required to have triage supervised by a Triage Delegate.

! Assessment Organisation Triage Delegates will need to be assigned to the Triage Delegate role in the assessor portal and hold certain qualifications and certifications. For more information regarding assigning a Triage Delegate role please refer to [My Aged Care Assessor Portal User Guide 12 – Managing Delegate Roles](#).

3. Please note that if there appears to be a record of the client completing the triage or screening questions previously, you can use the 'pre-populate' feature to use the basis of the triage



4. If during the triage process, the client does not provide consent to proceed, you should record this in the **Why was consent not provided?** section.

You are about to start a Triage for Abe Smith, AC94564648, born 18 November 1951, 72 Years. If the person's details are incorrect, a privacy breach may occur.

Please be advised that without capturing the consent, you cannot proceed any further with the assessment.


Start triage


Refer urgent services


Remove from device

Assessment consent

Fields marked with an * are mandatory

* Consent obtained from:

The Client

The client with support person

The authorised representative

Consent was not given

* Why was consent not provided?

Assessment no longer required

Client unable to consent

Representative not available

Revoked by representative

Support person not available

Other, please specify

* Comments

Maximum 500 characters

[Confirm](#)

i About consent >

i Capacity to give consent >

i Consent script >

5. You will also need to confirm that you have confirmed with the client that if consent is not provided, that the assessment will not be continued and that the assessment referral will be rejected.

The client with support person
 Consent was not given

i Consent script >

Why was consent not provided?

Assessment no longer required

Client unable to consent

Representative not available

Revoked by representative

Support person not available

Other, please specify

* Comments

Confirmation

If the client does not consent then this will result in the referral being rejected. Ensure the correct value is chosen before continuing.

Back
Continue

9.6 Commence Triage questions with client (Self-Referral)

To complete the Triage stage, select **Assessment**. Complete the triage questions based on the information provided to you by the client.

The screenshot shows the user interface for a self-referral assessment. At the top, the user is identified as 'Abe Smith' and the user 'Sammy Stark' is logged in. The navigation bar includes 'Client', 'Assessment', and 'Support Plan' tabs, with 'Assessment' selected. Action buttons include 'Complete Triage', 'Upload', 'Quick notes', 'Clear page information', and 'More options'. A status bar indicates 'You are conducting a Self Referral Assessment'. The main content area is titled 'Triage' and shows the 'Date of Triage' as '24 September 2024'. Below this is a section for '*Registration screen information collected from' with a grid of checkboxes for various roles: Client, Client's carer, family member and/or other, Client's representative, Client's General Practitioner, Representative of service provider, Health professional, Aboriginal Liaison Officer, Aged care connector and co-ordinator, Care finder, Via interpreter, Agent, and Other.

2. If you do not hold a Triage Delegate role, enter the details of the Triage Delegate who supervised you to complete triage.

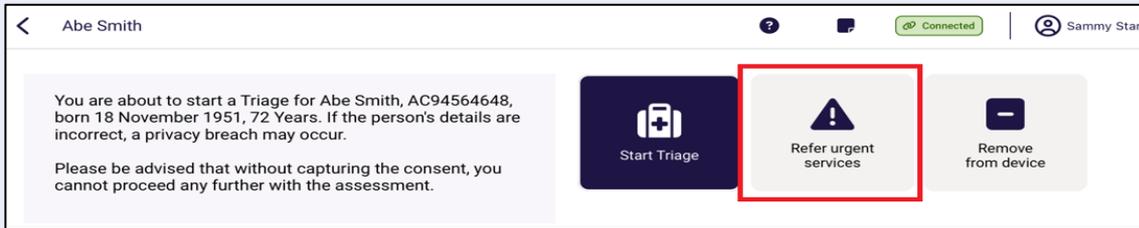
Then select **Complete Triage**.

The screenshot shows the user interface for a self-referral assessment. At the top, the user is identified as 'Ana Smith' and the user 'Elisha Burns' is logged in. The navigation bar includes 'Client', 'Assessment', and 'Support Plan' tabs, with 'Assessment' selected. The 'Complete Triage' button is highlighted with a red box. Action buttons include 'Upload', 'Quick notes', 'Clear page information', and 'More options'. A status bar indicates 'You are conducting a Self Referral Assessment'. The main content area is titled 'Triage' and shows the 'Priority of assessment' with buttons for 'High', 'Medium', and 'Low'. Below this is a text field for 'Outcome/advice for assessment notes'. The section 'Details of the supervised Triage' contains a text field for '* Triage supervised by', which is also highlighted with a red box.

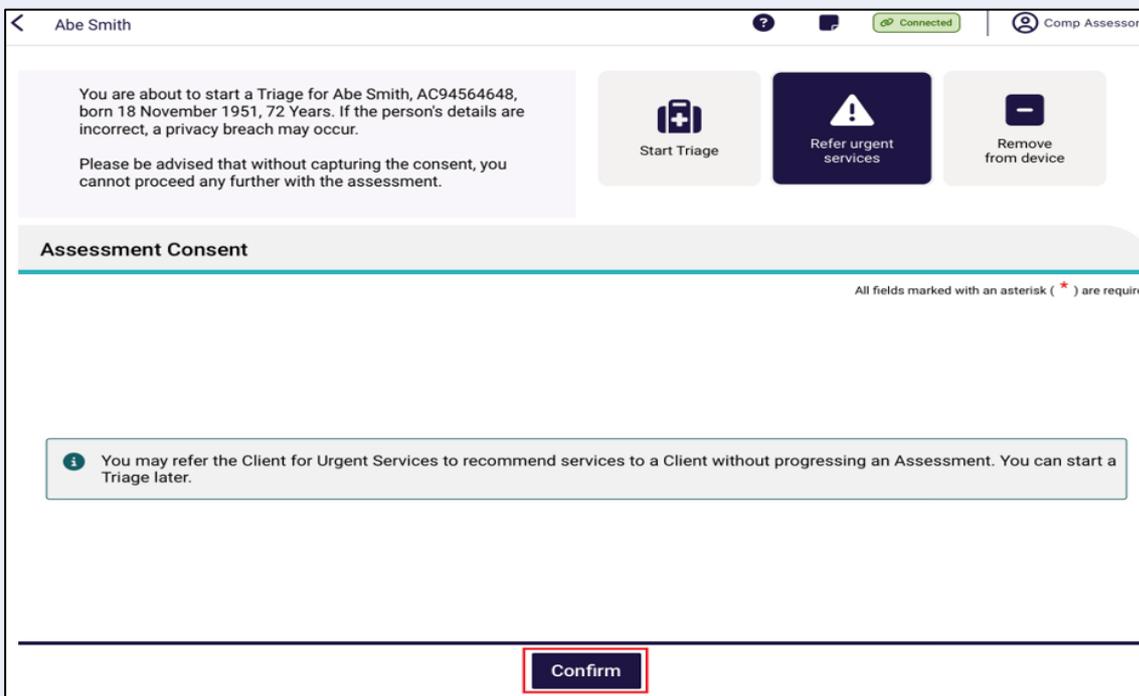
9.7 Recommend urgent services before completing Triage

Before commencing the Triage questions, you will have the option to refer the client for urgent services before you can recommend for CHSP services if required.

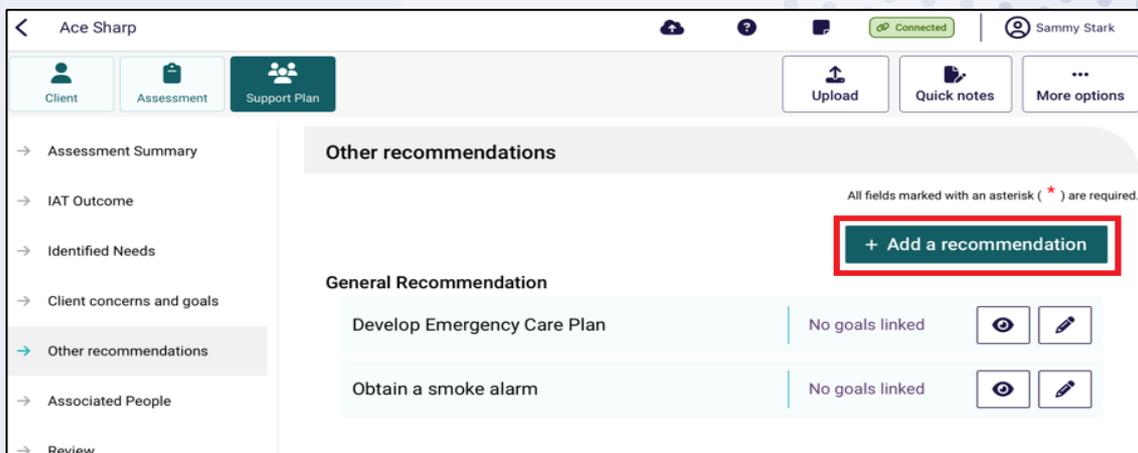
1. To do this, select the **Refer urgent services** on the assessment window.



2. Once you have clicked this, you will be asked to **Confirm** that you are wanting to proceed to refer the client for urgent services without progressing an assessment. Please note that you can start and complete the triage questions later.



3. Once you have clicked **Confirm**, the support plan **Other recommendations** will appear where you can select **+ Add a recommendation**.



4. Click **Service Recommendation**.

< ? [Connected] Comp Assessor

Recommendation

Select a recommendation type

Service Recommendation [Recommend →](#)

5. Select **Service type** required for urgent services using the list displayed.

< ? [Connected] Comp Assessor

Adding a Service Recommendation

Fields marked with an * are mandatory

* Service type

Done

Nursing
Case Management
Home modifications
Client Care Coordination

6. Complete all mandatory fields for the service recommendation, including:
 - a. Service type
 - b. Priority
 - c. Recommended a start date
 - d. Recommend a review date
 - e. Recommend an end date
7. On completion of all mandatory fields, select **Save**.

Fields marked with an * are mandatory

* Service type

Nursing

* Priority

Low Medium High

Recommended service intensity ⓘ

Recommended service frequency ⓘ

* Recommend a start date

Save Cancel

9.6 Converting assessments after completing Triage

After triage has been completed, needs assessors will have the ability to convert a home support assessment recommendation to a comprehensive assessment if it is in their expert opinion that the client requires it based on the information provided during triage.

1. After completing triage select **Convert to Comprehensive**.

Test Client

You are about to start a Home Support Assessment for Test Client, , born 25 September 1948, 76 Years. If the person's details are incorrect, a privacy breach may occur.

Please be advised that without capturing the consent, you cannot proceed any further with the assessment.

Start Assessment

Refer urgent services

Convert to Comprehensive

Rem from d

2. The reason for change will be pre-filled to High level care needs. Enter additional information regarding the reason in the **Reason or comments** field and then select **Confirm**.

Convert to Comprehensive Assessment

i You are about to convert the assessment type from Home Support to Comprehensive for Test Client

Assessments should only be converted if the client needs exceed the level of care than can be provided through Home Support Assessments (e.g. Home support service). Once the assessment has been converted to comprehensive assessment, you can recommend all aged care services. Please note it will not be possible to revert it back to a Home Support assessment.

Are you sure you would like to proceed?

*** Reason for change**

High level care needs

*** Reason or comments**

0/255

Cancel Confirm

3. The assessment will then be converted to a comprehensive assessment.

10 Referrals, reviews and creating an offline client for assessment

Client referrals can be downloaded for all referrals that have been assigned to you in the assessor portal. When downloaded to your device, the assessment, client profile, notes tab and attachments tab will pre-populate with information collected during screening and previous assessments (if applicable).

Similarly, client reviews can be downloaded for all reviews that have been assigned to you.

An internet connection is needed to download client referrals and reviews to a compatible device. The App can store up to 50 clients at any one time.

You can also create and save an offline client to your device whilst offline and conduct an assessment and commence a support plan. However, you will require an internet connection to conduct a review.

Once re-connected to the internet, the [offline client can be registered](#) or [linked to an existing client](#), prior to uploading the assessment and support plan information to the assessor portal.

! When you download a client's referral or review to your device, the client record and the assessment will be locked in the assessor portal and remain locked until you [Upload the assessment or review](#), or if you remove the referral/review from your device.

Referrals and reviews can be removed via the App or the assessor portal.

Any client referrals and reviews that are downloaded to your device will appear in the App section of the assessor portal, under **Downloaded Referrals**.

Assessor Portal

Home | Aged Care Assessment App

Aged Care Assessor App

Aged Care Assessor is activated

Locked Device

If your app has been locked due to 14 days inactivity or too many password attempts, you can generate an unlock code below.

[GENERATE AN UNLOCK CODE](#)

[Assessments](#) [Reviews](#)

Downloaded Referrals

Below are all the referrals currently downloaded to your device. You can directly remove them from your device here but this will **delete all data that was captured on the app** since it was last uploaded.

We recommend removing them only when

- The device is lost or cannot be accessed
- The Aged Care Assessor app was uninstalled
- You are unable to upload the assessment

1 to 5 out of 5 matching results

Client	Remove from Device?
Jonas Abdullah	
Jonas Abrego	
Harry Cleora (Jaquelin)	

! A person with the Team Leader role in the assessor portal can reassign client referrals that have been downloaded.

If a downloaded referral is reassigned to another assessor, any data entered on the device whilst offline will not be able to be uploaded and will be discarded by the App. To retain data entered offline, it is advised to upload the assessment to the assessor portal prior to re-assigning the referral.

Needs assessors will also receive a notification in the assessor portal informing them when a downloaded referral has been re-assigned to another assessor.

10.1 Navigating between referrals and reviews

The App's dashboard will display your assessment outlet/s referrals and their statuses:

- Triage
- Urgent Services
- Not started
- In progress
- Review



To navigate between each view, use the side menu.

1. After logging in to the app, the Dashboard page will be displayed. Select the outlet to open and view your referrals.

UAT SAS Outlet Due in 2 days	
Triage Not Started	2
Urgent Services Pending Triage	1
Triage In Progress	2
Assessment Not Started	0
Assessment In Progress	1
SPR In Progress	0
SPR Not Started	0

2. Once selected, the view will display all referrals.

Client Name	Location	Aged Care ID	Assessment type	Assessment status	Completed Triage due by
Test Client			Home Support Assessment	Triage not started	
Aaron Jones	CRONULLA, NSW, 2230	AC19537430	Home Support Assessment	Triage in progress	21/09/2024 (4 days overdue)
Ace Sharp	KURRI KURRI, NSW, 2327	AC48348551	Comprehensive Assessment	In progress	20/09/2024 (5 days overdue)
Aadi Smith	GLEN INNES, NSW, 2370	AC92092113	Home Support Assessment	Triage not started	21/09/2024 (4 days overdue)



3. To filter referrals, select the **Filter** drop-down. You can filter referrals by:

- **Keyword**
- **Order**
- **Status**
- **Priority**
- **Assessment type**

The screenshot shows a dashboard titled 'Big Bang Aged Care (9 IAT Assessments)'. A red box highlights the 'Filter' section, which includes a 'Keyword' search field and four dropdown menus: 'Order' (set to 'Last name A to Z'), 'Status' (set to 'Select a status'), 'Priority' (set to 'Select priority'), and 'Assessment type' (set to 'Select a type'). A 'Clear filters' button is located at the bottom right of the filter panel. Below the filter panel, three client cards are visible: Penny Teller (Bonner, ACT, 2914), Leonard Hofstadter (Pasadena, NSW, 2157), and Howard Wolowitz (Maryborough, QLD, 4567). Each card displays the client's name, location, Aged Care ID, assessment type, and clinical intervention due date.

10.2 Downloading a client's referral or review

To download a client's referral for assessment or support plan review, follow the steps below. You must be connected to the internet.

1. Open and log in to the app with your password, following the process in [Signing into the App after activation](#).

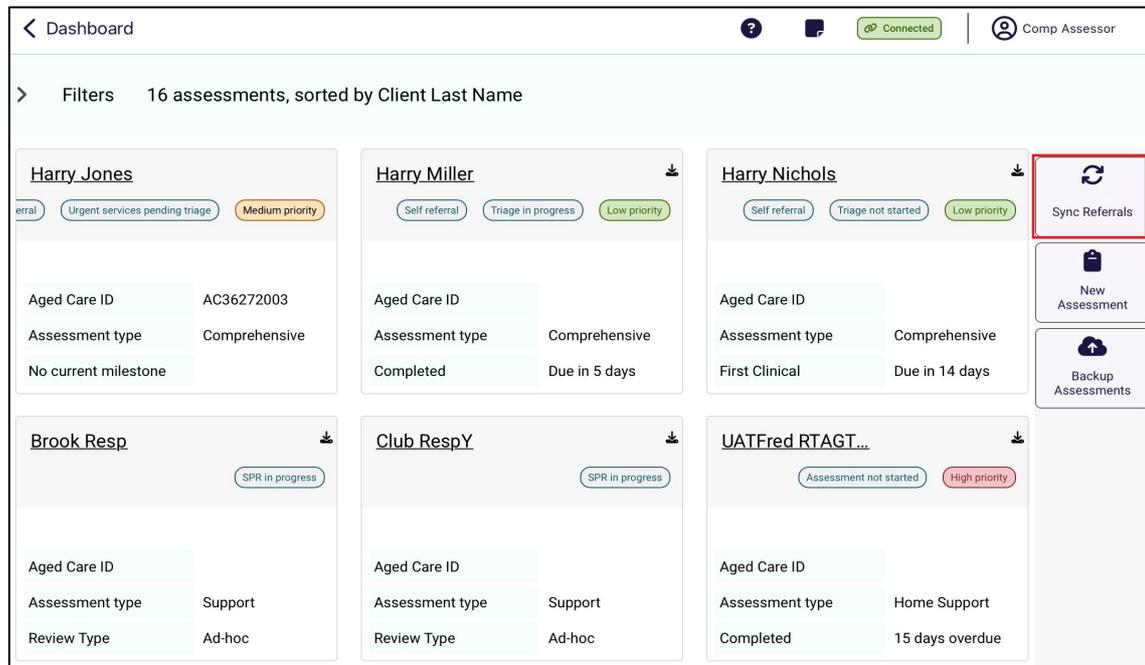
The Dashboard page will be displayed. Click on your outlet. In your outlet, client referrals and review cards will appear together in alphabetical order (by last name). Referrals for Comprehensive, Home Support, Residential Respite assessments and Support Plan Reviews can be identified by the referral **Assessment type** field.

The screenshot shows a dashboard titled 'Dashboard' with a status bar indicating 'No internet' and the user 'Sammy Stark'. Below the status bar, it says 'Filters 7 assessments, sorted by Client Last Name'. The main content area displays four client cards: 'Test Client', 'Aaron Jones', 'Ace Sharp', and 'Aadi Smith'. Each card shows the client's name, location, Aged Care ID, assessment type, assessment status, and completed triage due by date. The 'Assessment type' field for 'Ace Sharp' (Comprehensive Assessment) and 'Aadi Smith' (Home Support Assessment) is highlighted with a red box. On the right side of the dashboard, there are three buttons: 'Sync Referrals', 'New Assessment', and 'Backup Assessments'.



! The visual indicator on the referral card identifies how a referral is tracking against the next relevant Key Performance Indicator (KPI) milestone (for example - completed support plan or finalised support plan)

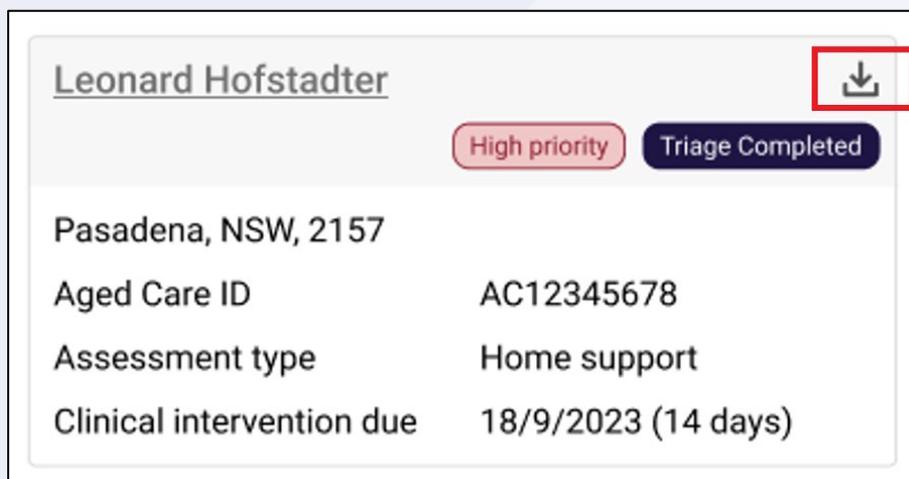
To ensure that you are viewing the most up to date list of referrals/reviews assigned to you, select **Sync Referrals** on the righthand side of the page when you are connected to the internet.



If you cannot see the client's referral/review card on the Dashboard, speak to your Team Leader to ensure it has been assigned to you.

You can also check connectivity via the App settings to confirm your device is connected to the internet and to Aged Care Gateway server. If you continue to experience issues, call 1800 836 799 for assistance or follow the steps in [App troubleshooting and diagnostics](#) to diagnose issues experienced with the App.

2. Select the client referral/review card you want to download.



3. Once selected, the downloaded assessment will show the progress of downloading this to the device.

Download assessment for Aadi Smith

Step	Progression
<input checked="" type="checkbox"/> Download Client Details	Downloaded
<input checked="" type="checkbox"/> Download Client Notes	Downloaded
<input checked="" type="checkbox"/> Download First Intervention	Downloaded
<input checked="" type="checkbox"/> Download Client Approvals	Downloaded
<input checked="" type="checkbox"/> Download Assessment	Downloaded
<input checked="" type="checkbox"/> Download Support Plan	Downloaded

[+ Open assessment](#) [Close](#)

4. If the download fails, it will show a status of Failed. It will give you the option to either try again or download it later.

Download assessment for Aaron Jones

Step	Progression
<input checked="" type="checkbox"/> Download Client Details	Failed to download
<input type="checkbox"/> Download Client Notes	Ready for download
<input type="checkbox"/> Download First Intervention	Ready for download
<input type="checkbox"/> Download Client Approvals	Ready for download
<input type="checkbox"/> Download Assessment	Ready for download
<input type="checkbox"/> Download Support Plan	Ready for download

The assessment failed to download. Please try again or contact My Aged Care service provider and assessor helpline on 1800 836 799 if problems persist.

[Try again](#) [I'll do it later](#)



- When downloading referral cards, you will be asked if you want to pre-populate the assessment with the latest assessment or screening information.

On the next screen you will be asked if you would like to pre-populate the IAT questions from previously collected information.

* Would you like to pre-populate the IAT questions from previously collected information?

Yes Blank assessment

Confirm

- Select **Yes** or **Blank Assessment**. If you select **Yes**, the assessment form will be populated with the information contained in either the latest assessment or the screening if an assessment has not been captured. You will be able to select which assessment information to use. Once selected, click **Confirm**.

* Would you like to pre-populate the IAT questions from previously collected information?

Yes Blank assessment

* Select a record

Comprehensive (Completed 06 June 2024)

Confirm

! A needs assessor only can select whether they would like to start the assessment pre-populated or as a blank assessment once.

A needs assessor will still have the ability to clear page information from within the assessment.

- Once you have clicked on the client referral card a download window will appear. You can view the progress of the download.

When the client's referral/review has successfully downloaded, the download icon will disappear, and when you click on the name you will have the option to **Start triage**, **Refer urgent services** to commence their assessment or review. You will also be able to **Remove from device**.

You will now be able to:

- view client information ([Viewing and adding client information](#))
- set up support relationships ([Registering a support person](#))
- complete identity verification ([Completing identity verification](#)); and either
- conduct triage ([Completing Triage questions](#)); and
- conduct the assessment ([Undertaking assessments](#)), or
- conduct a review ([Conducting support plan reviews](#)).

10.3 Creating an offline client

You can complete an offline assessment for a client who is not assigned to you in the assessor portal by creating and saving a client record locally to your device.

This could occur in a variety of circumstances; for instance, you are in a client's home undertaking an assessment offline and you determine that their partner or someone else living at the same address, who may not be registered with My Aged Care, also requires an assessment.

This function is not available with support plan reviews.

To create an offline client on the App whilst offline, follow the steps below.

! Where possible, you should always attempt to confirm whether a person is registered with My Aged Care prior to creating an offline client in the App. If a client already has an assessment in progress, you will not be able to refer this client to your outlet and consequently be unable to upload and complete the assessment.

If the client has not been referred to you and does not have an in-progress assessment, and you can:

- Refer this client to yourself in the assessor portal if the reason for the assessment is either In-hospital, remote assessment, First Nations or Homeless or at risk of. This process is described in the [Assessor Portal User Guide 1 – Registering and self-referring clients](#).
- Facilitate a referral for the client to your organisation for a reason outside those listed above by calling the My Aged Care service provider and assessor helpline on 1800 836 799. This must be done before you can upload the assessment to the assessor portal. You can still undertake the assessment offline if no internet connection is available.

1. Open and log in to the App with your password, following the [Signing in to the App after activation](#) process.

The Dashboard will be displayed with your outlet and the status of referrals in various statuses.

Note the Connectivity indicator on the top right of the screen is showing an orange offline connection icon with a chain, which means the app is disconnected from the internet.

Select **Find A client** on the righthand side of the Dashboard.

The screenshot shows the app's dashboard for user Sammy Stark. At the top right, a red box highlights a 'No internet' connectivity indicator. The main header says 'Welcome Sammy Stark' with a sub-header 'Referrals last synced 19:09 yesterday'. Below this is a section titled 'Assessment Outlets' which contains a table for 'UAT SAS Outlet' with a 'Due in 2 days' badge. The table lists various assessment stages and their counts. On the right-hand side, there is a vertical menu with buttons for 'Sync Referrals', 'No uploads pending', 'Find A Client' (highlighted with a red box), and 'Backup 3 Assessments'.

UAT SAS Outlet	
Triage Not Started	2
Urgent Services Pending Triage	1
Triage In Progress	2
Assessment Not Started	0
Assessment In Progress	1
SPR In Progress	0
SPR Not Started	0

2. A message will display notifying you that you are not connected to the internet. Select **Create Offline Client**.

 You are offline.

If you wish to continue you can create an offline client and commence an assessment offline. When you are re-connected to the internet you will need to register or select an existing client and link the offline client to the registered record.

Create Offline Client

3. A blank client record will be displayed. Enter all mandatory client details as indicated by a red asterisk, red triangle on the right. Select **Save** to save the client locally to your device.

Register a client

Yes No

Identity Match

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

Does this person have a Medicare Card Number?*

Yes No

Government IDs

These government IDs will assist us with retrieving existing care approvals from DHS (if there are any).

Does this person have government IDs?*

Yes No

Save

Select an Assessment type for the client from the drop-down menu and the Outlet that you want to assign to complete, then select **Save**.

Assessment details

Select an Assessment type and Outlet

Assessment type *

Comprehensive Assessment

Outlet *

UAT SAS trial Outlet

Save **Cancel**



- The offline client's referral will display on the Dashboard. Click on the Outlet and the client's record will be displayed. You will now be able to:
 - enter additional client profile information ([Viewing and adding client information](#))
 - undertake triage (if a Triage Delegate).
 - undertake an assessment ([Undertaking assessments](#)); and
 - commence developing the client's support plan ([Developing a support plan](#)).

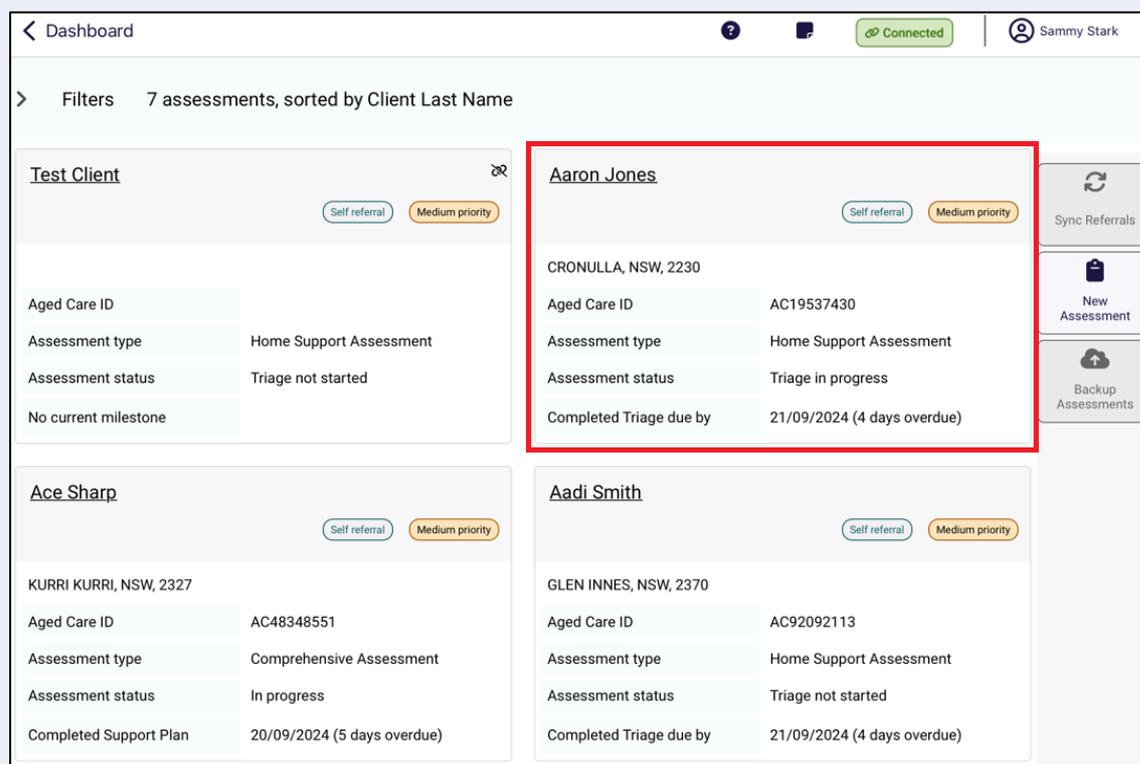
! Clients created offline will have a visual indicator to identify that they have been created locally to the device.

11. Viewing and adding client information

You can view client information previously collected for downloaded assessment referrals, downloaded support plan reviews or offline clients (saved locally to the device using the [Creating an offline client](#) process).

To view client information:

1. Open and log in to the App, following the [Signing in to the App after activation](#) process.
2. The dashboard page will be displayed, click on your outlet. Once in the outlet, click on the client's name in the client card to navigate to the client's details.



3. The **Client Profile** page will be displayed.

Alternatively, you can access client details within the client's assessment or review by selecting the client link at the top left corner of the page.

You can toggle between the client, assessment and support plan without losing any information.

! The following screenshots are from a downloaded assessment referral. The client information is the same when in a downloaded support plan review.

The **Client profile** page contains information from the client record including:

- Personal information (Name, date of birth, etc.)
- Communication requirements
- Identity documents
- Identity status
- Health Insurance



! Client profile information can be edited from this section. Any information that is updated from the App will overwrite the profile information that is in the client record when uploaded to the assessor portal.

← Leonard Hofstader

Client Assessment Support plan

Client profile

→ Contact details

→ Support network and coinhabitants

→ Wallet check

→ Event summary and approvals

→ Attachments

→ Notes

Client profile

Title

Mr

* First name

* Middle name

* Last name

Date of birth Estimated age

* Date of birth

! When all mandatory client profile information has been completed, a tick will appear next to the section. This information must be completed to generate assessment outcomes at the completion of the assessment.

Client Assessment Support Plan

✔ Client Profile

→ Contact Details

The **Contact details** page displays the client's contact information, mobile and home numbers, email address, preferred contact method and address details.

Needs assessors can add and/or edit contact information and configure notification preference (SMS and/email) in the **Contact details** section.

To prompt SMS notifications for a client and their support network or representative, follow the steps below.

1. Obtain Consent to send SMS and email about the client, then add mobile phone number. Select the **Verify** button. This will send a six digit code to the recipient's mobile number.

← Leonard Hofstader

Client Assessment Support plan Sync data Notes More options

Client profile

→ Contact details

→ Support network and coinhabitants

→ Wallet check

→ Event summary and approvals

→ Attachments

→ Notes

Contact details

Home phone number:

Consent to send SMS and emails about the client?

Yes No

Mobile phone number:

Australia +61 04134543234

***Unverified**

Email: testemail@hotmail.com

Notify by email:

Notify by SMS:

Other contact details

No contact details provided

Assessment information

Home address: 123 Northbourne Ave, Braddon, ACT 2900

Service delivery address: 123 Northbourne Ave, Braddon, ACT 2900

Send any correspondence to: 123 Northbourne Ave, Braddon, ACT 2900

2. Enter the six digit code and select **Confirm code**.

← Harry Goff

Client Assessment Support Plan Upload More options

Client Profile

→ Contact Details

→ Support Network and Cohabitants

→ Wallet check

→ Event summary and Approvals

→ Attachments

→ Notes

Contact Details

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

Enter verification code

A six digit code has been sent to Harry Goff's mobile phone number, Please enter it in the space below.

Home phone number

Consent to send SMS and emails about the client

Yes No

Mobile phone number

Australia +61



Once the number has been verified, to set SMS notification toggle on **Notify by SMS**. To remove a preference you can select the toggle to remove the preference.

← Leonard Hofstader

Client Assessment Support plan

Sync data Notes More options

Contact details

Home phone number:

Consent to send SMS and emails about the client?
 Yes No

Mobile phone number:
Australia +61 04134543234

Email:
testemail@hotmail.com

Notify by email:

Notify by SMS:

Other contact details

No contact details provided

The **Support Network and Cohabitants** page displays the client's representatives, the people they represent and other relationships (the support network). The process for setting up support network relationships is explained in [Registering a support person](#) section.

← Ace Sharp

Client Assessment Support Plan

Quick notes More options

Support Network and Cohabitants

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

Last updated 10:07 am 19/09/2024

People that support Ace Sharp

Pending	No relationships found
Active	No relationships found

Organisations that support Ace Sharp

Pending	No relationships found
Active	No relationships found

People that Ace Sharp supports

Jodi Sharp (Parent)

The **Wallet check** page displays the status of the wallet check. This process is explained in the [Completing Identity Verification](#) section.

The screenshot shows the 'Wallet check' page for a client named 'Test Client'. The page has a sidebar on the left with navigation options: Client Profile, Contact Details, Support Network and Cohabitants, **Wallet check** (highlighted), Event summary and Approvals, Attachments, and Notes. The main content area is titled 'Wallet check' and includes a note: 'All fields marked with an asterisk (*) are required.' There are three radio button options: 'My client has identification' (selected), 'My client has no valid ID at this time', and 'My client is unable to produce ID'. Below these is an information box stating: 'Please check two types of ID from the following list. If you do not select two documents, the wallet check cannot be uploaded, and the information will be discarded during the upload process. By ticking each box, you are confirming that you have sighted the original document.' Underneath is a section 'Common types of identification' with five items, each with a toggle switch: Medicare Card, DVA Card, Drivers License, Health Care Card, and Passport.

The **Event Summary and Approvals** page displays information about screening and previous assessments (if applicable). It will also contain information about a client's current Approvals and services in place, if applicable.

The screenshot shows the 'Event Summary and Approvals' page for a client named 'Leonard Hofstader'. The page has a sidebar on the left with navigation options: Client profile, Contact details, Support network and coinhabitants, Wallet check, **Event summary and approvals** (highlighted), Attachments, and Notes. The main content area is titled 'Event Summary and Approvals' and is divided into three sections: 'Assessment information' (with three entries: 'Comprehensive Assessment was completed on 5 October 2023', 'Client acknowledgement received on 5 October 2023', and 'Comprehensive Assessment status is Support Plan Review'), 'Recommended assessments' (with three entries: 'Comprehensive Assessment (High priority) started 01 August 2023', 'Comprehensive Assessment (Low priority) started 15 July 2023', and 'Home Support Assessment (Low priority) started 24 May 2020'), and 'Triage History' (with one entry: 'Triage Completed on 29 July 3 Pm y James Jones. Outcome : Eligible for an aged care assessment').

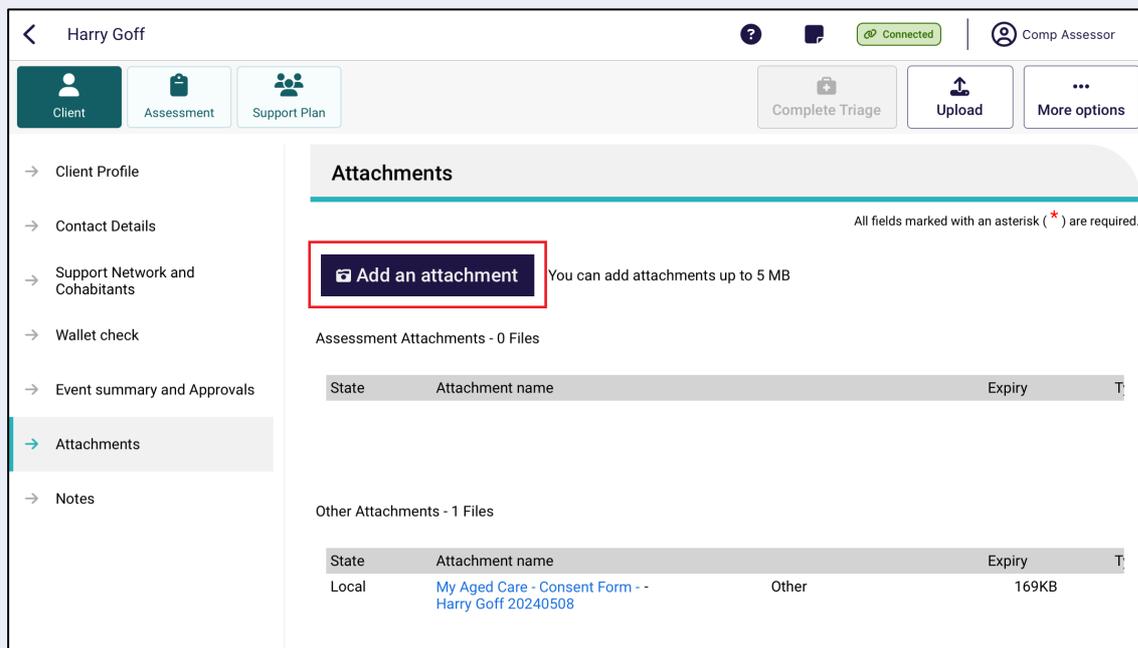
The **Attachments** page enables you to view client attachments and add attachments.

To view an attachment, select the hyperlink name of the attachment name. Once clicked the



attachment will open a new page and the attachment will be visible.

Selecting **Add an attachment** will open a new page where you can record the name, type and description of the attachment. The **Types** of attachments that can be added match those available in the My Aged Care assessor portal.



3. Once you have recorded the details, you can click **Capture photo**, which will open your device's camera app.
4. Once you have taken the photo, you will be given the option to either **Retake** or **Use Photo**. If you are happy with the attachment, click **Save to record**.

! When uploading an attachment, it is crucial to ensure that the document is intended for the correct client. Uploading an attachment to the wrong client's file can lead to a breach of privacy. Always double-check the client details before proceeding with the upload.

If you are uncertain about the client's identity, please refrain from uploading the document and seek clarification. This precautionary measure helps maintain the integrity of our service and protects client privacy.

Any attachments added whilst offline will appear in the **Attachments** tab of the client record when the assessment is uploaded to the My Aged Care assessor portal.

! The attachment image will only save in the App. For security purposes, the image will not be saved locally to the device.

You will need to enter a **Name** and a **Type** of image (for example, Power of Attorney), which will be displayed in the My Aged Care assessor portal. You can also add a description for the attachment in a free text box.

The **Notes** page enables you to add and view Client notes. The Note types available match those available in the My Aged Care assessor portal (for example, Client story, Sensitive Notes, Preference, Other or Observations).

These notes will be visible in the Notes tab on the client record when the assessment is uploaded to the My Aged Care assessor portal. Clients (and their support network) will only be able to view Client story and other notes.



! When needs assessors add a sensitive note about a client, all service providers who are sent a referral will see a flag informing them that there is a sensitive note about the client and instruct them to call the My Aged Care contact centre or the Needs assessor for more information.

← Leonard Hofstader

Client Assessment Support plan

Sync data Notes More options

Notes

Add a note

Type	Description
Preference	Client's has a preference for Indigenous Assessment outlet
Sensitive notes	The client is unable to ...

The **Notifications** page is displayed only if the client has an approval for a home care package. It enables you to request to receive notifications of home care correspondence for the client by toggling the **Yourself** button.

11 Registering a support person

You can view pending and active support people, people that the client represents and other relationships on the **Support Networks and Cohabitant** page.

You can:

- [Create a relationship for an individual representative or an individual agent.](#)
- [Create a relationship for a representative organisation or an agent organisation.](#)
- [Create a relationship for a carer or other types of support people.](#)
- [Create a relationship in offline mode.](#)
- [Activate a pending relationship.](#)
- [Remove a support relationship.](#)

For more information on the types of support relationships that can be created, refer to [My Aged Care – Assessor Portal User Guide 2 – Registering support people and adding relationships.](#)

! A warning symbol will be displayed next to the **Support Network and Cohabitants** menu item when a client has pending representatives that need to be confirmed.

11.1 Creating a relationship for an individual representative or an individual agent

You must be connected to the Internet.

! If you are offline, you can create a local record in Offline mode and register the record when you go back Online. Go to [Creating a relationship in offline mode](#) to complete this process.

1. On the client's **Support Network and Cohabitants** page, select **Create Relationship**.

The screenshot shows the 'Support Network and Cohabitants' page for a client named Harry Goff. The page includes a sidebar with navigation options: Client Profile, Contact Details, Support Network and Cohabitants (selected), Wallet check, Event summary and Approvals, and Attachments. The main content area displays the title 'Support Network and Cohabitants' and a 'Create Relationship' button highlighted with a red box. Below the title, there is a section for 'People that support Harry Goff' with two rows: 'Pending' and 'Active', both showing 'No relationships found'.

2. In the **Create Relationship** page, choose a relationship to establish for the client. In this case it would be **Regular Representative**, **Authorised Representative**, or **Agent**. Depending on the relationship chosen, the following steps may vary.

The screenshot shows the 'Create Relationship' page for a client named Ace Sharp. The page includes a dropdown menu for 'The support relationship Ace would like to establish is:' with 'Regular Representative' selected. Below it is a question 'Would you like to appoint a Person or an Organisation?' with a text input field. A 'Next' button is visible at the bottom right. At the bottom of the page, there is a list of relationship types: Regular Representative, Authorised Representative, and Agent, with 'Regular Representative' highlighted by a red box.



3. For **Would you like to appoint a person or an organisation?**, choose **Person: someone who is not part of a support organisation e.g. A family member**, then select **Next**.

Ace Sharp

Ace Sharp

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

Create Relationship

* The support relationship Ace would like to establish is:

Regular Representative

Would you like to appoint a Person or an Organisation? *

Person: Someone who is not part of a support organisation (e.g. a family member)

Is this person present (in person or by phone/video call) with the client? *

Yes No

Next

Done

Person: Someone who is not part of a support organisation (e.g. a family member)

Organisation: Staff at a support organisation (e.g. an advocacy organisation)

4. Select **Yes** or **No** to the question **Is this person present (in person or by phone/video call) with the client?**, then select **Next**.

If **No**, you will be asked whether the client has a complete Appointment of a Support Person Form or Appointment of a Support Organisation Form with them.

Ace Sharp

Ace Sharp

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

Create Relationship

* The support relationship Ace would like to establish is:

Regular Representative

Would you like to appoint a Person or an Organisation? *

Person: Someone who is not part of a support organisation (e.g. a family member)

Is this person present (in person or by phone/video call) with the client? *

Yes No

Next

! If the support person is not present with the client, and they do not have a completed [Appointment of a Support Person Form](#) then the relationship cannot be created.

Ace Sharp

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

Create Relationship

*** The support relationship Ace would like to establish is:**

Regular Representative 

Would you like to appoint a Person or an Organisation? *

Person: Someone who is not part of a support organisation (e.g. a family member)

Is this person present (in person or by phone/video call) with the client? *

Yes No

Does the client have a completed Appointment of support person or organisation form with them? *

Yes No

! Unable to create this relationship if Support person is not present with client and Appointment of support person or organisation form not completed.

- After answering the above questions satisfactorily, the **Find a Support Person** page appears.

Enter the last name and first name of your regular representative, authorised representative or agent, and select **Search**. This is to ensure that there are no duplicate record being accidentally made in the My Aged Care system.

Then, go to the next step (6) if there are no records found, or go to Step 8 if there are matching record/s.

Find a support person

 Before registering a new client, check the client exists

First name	Last name	Aged Care ID
<input type="text"/>	<input type="text"/>	AC- eg. 12345678
<small>0/50</small>	<small>0/50</small>	<small>0/8</small>

> **Advanced search**

- If there are no records found, you can continue to register this representative or agent in the My Aged Care system, by selecting **Register a Support Person**.

Find a support person

Before registering a new client, check the client exists

First name	Last name	Aged Care ID
Presley	Abide	AC eg. 12345678

Advanced search

Search

No records returned

Register a Support Person

- Enter all mandatory fields in each of the five pages until the Register button turns blue. Then, select **Register**.

Register a Regular Representative

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

- Personal details
- Address details
- Identity Match
- Attachments
- Details and Consent

Title

*** First name**
Tess

Middle name

*** Last name**
Smith

*** Gender**
Female

Date of birth / estimated age *
Please enter the date of birth. If not known, enter the client's estimated age.
Date of Birth Estimated Age

*** Date of birth**
19/09/1964

Register

- If matching records are found, be sure to select the correct matching record.

Search results

Results 1 found - search again, select an existing client or register a new client. If you can't find the Support person record, try other search parameters or

Register a Support Person

Harry Miller (Active)

33 HARTLEY Street, ALICE SPRINGS, NT 0870

Aged Care ID AC39066840

Phone

Assessment status



9. The Support Person's details page appears. Double check that it is correct, then select **Attachments**.

Harry Miller's Details

- About
- **Attachments**
- Details and Consent

Add Appointment of support person or organisation form

Add an image You can add attachments up to 5MB

Current Attachments

Attachment Name	Size
State	Attachment name
Local	My Aged Care - Consent Form - Harry Goff 20240508 - Other 169KB
Local	My Aged Care Consent Form - Harry Goff - Other 179KB

Create relationship

The **Attachments** page appears. Add the appointment of support person or organisation form by selecting **Add an image** and taking an image of the form from your device. Name the image and its name will appear under **Current Attachments**. Then, continue to the **Details and Consent** page.

10. The **Details and Consent** page appears.

Fill out all mandatory fields in the Details section, including how the support person will make decisions, type of relationship, and start date of relationship.

Harry Miller's Details

- About
- Attachments
- **Details and Consent**

Details

The following fields are mandatory or invalid:

- Relationship Type
- Make decisions about
- Consent from relevant parties to establish support relationship

Make decisions about

Relationship type *

Please select a start date for this relationship, and enter an end date if it will be time limited.

Start date *

End date *

Create relationship

Consent

Fill out all mandatory fields in the **Consent** section, including if consent from both the client and the support person has been provided.

Then, select **Create Relationship**.

TESTRDM BVTRDM's Details

→ About

→ Attachments

→ Details and Consent

- I will consult with the person I represent before accessing any information or conveying decisions with My Aged Care.
- I will work with and consult with other representatives (if applicable) before accessing any information or conveying decisions with My Aged Care on behalf of the person I represent.
- Any action I take will be in the interests of the person I represent.

I understand that:

- Making this Appointment will create a record for me and the person I am representing in My Aged Care, if either I or the person I am representing don't already have one.
- This Appointment of Representation is specific to interactions with My Aged Care.
- My personal information is collected by My Aged Care and shared with any assessors, service providers, organisations or medical professionals, that are supporting the person I represent.
- My name and telephone number will be shared with all other appointed support persons and organisations, for the purpose of enabling me to assist the person I represent in My Aged Care.
- If I am the nominated Primary Contact, I will be the first point of telephone contact for My Aged Care for the person being represented.
- I can cancel this Appointment at any time by calling My Aged Care on 1800 200 422 or through my Online Account.
- I must inform My Aged Care of any changes to my address and contact details, and changes in the circumstances of the person who has appointed me.
- Giving false or misleading information is a serious offence.
- I will receive correspondence from My Aged Care on behalf of the person I represent.

I acknowledge:

- By accepting this relationship, I will transition to a supporter role on 1 July 2025 under the Aged Care Act 2024. I will act in accordance with the duties and obligations specified under the Aged Care Act 2024. For more information, please visit <https://www.myagedcare.gov.au/arranging-someone-support-you>.

Yes No

Create relationship

! You must obtain the following consent before you can set up an active representative relationship:

- Representative's consent to register with My Aged Care (this will create a representative record);
- Representative's consent to represent the client;
- Client's consent to be represented by the nominated representative.

Please note, consent is not required for authorised representative relationships

! A pending relationship is created if:

- If either the client or representative do not provide their consent for the relationship to be set up (applicable for regular representatives or agent individuals only); or
- The start date of the relationship is in the future; or
- An Authorised representative relationship is being created.

To activate a pending relationship, go to [Activating a pending relationship](#).

11. The new representative or agent will be displayed on the **Support Network and Cohabitants** page.



11.2 Creating a relationship for a representative organisation or an agent organisation

1. On the client's **Support Network and Cohabitants** page in Client Details, select **Create Relationship**.

2. In the **Create Relationship** page, choose a relationship to establish for the client. In this case it would be **Regular Representative**, **Authorised Representative**, or **Agent**.

Depending on the relationship chosen, the following steps may vary.



< Harry Boyer

Harry Boyer

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

Create Relationship

The support relationship Harry would like to establish is: *

Agent

Would you like to appoint a Person or an Organisation? *

Next

Done

Regular Representative
 Authorised Representative
 Agent
 Carer
 Emergency Contact
 GP

3. For **Would you like to appoint a person or an organisation?**, choose **Organisation: staff at a support organisation (e.g., An advocacy organisation)**.

Then, select **Next**.

< Harry Boyer

Harry Boyer

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

Create Relationship

The support relationship Harry would like to establish is: *

Agent

Would you like to appoint a Person or an Organisation? *

Organisation: Staff at a support organisation (e.g. an advocacy organisation)

Next

Done

Person: Someone who is not part of a support organisation (e.g. a family member)
 Organisation: Staff at a support organisation (e.g. an advocacy organisation)

4. Search for the support organisation by either entering their name, or postcode and/or distance away from the postcode, then select **Search**.



Search by Organisation Name

[← Back](#)

Add an Agent Organisation

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

Search for Support Organisation by:

Post Code **Organisation Name**

Organisation Name

Search by post code and/or distance

[← Back](#)

Add an Agent Organisation

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

Search for Support Organisation by:

Post Code Organisation Name

Postcode **Distance**

Type here to search for a postcode...

5. Select the support organisation for the agent.

[← Back](#)

Add an Agent Organisation

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

Last updated 02:33 pm 17/05/2024

2 matching results

Agedcare Society Organisation	Agedcare Society Organisation
Branch: Agent Society Outlet	Branch: CBRUAT Agent Outlet
Location: 12 FURZER Street Access, PHILLIP, ACT	Location: Unit 1/15 JOHN CLELAND Crescent
Phone number:	Phone number:
Support offered:	Support offered:

The organisation details are displayed in the **About** section of the **Organisation Details** page.



Double check that it is correct, then select **Attachments**.

The screenshot shows a mobile application interface for adding an agent organisation. At the top, there is a back arrow and the text 'Add an Agent Organisation'. Below this is a section titled 'Organisation details' with a note that 'All fields marked with an asterisk (*) are required.' On the left, there is a vertical menu with three items: 'About', 'Attachments', and 'Details and Consent'. The 'Attachments' item is highlighted with a red border. To the right of the menu, the form fields are displayed: 'Organisation Name' (Agedcare Society Organisation), 'Branch' (Agent Society Outlet), 'Phone number', 'Address' (12 FURZER Street Access, PHILLIPACT 2606), and 'Support offered'.

6. The **Attachments** page appears. Add the appointment of support organisation form by selecting **Add an image** and taking an image of the form from your device. Name the image and its name will appear under **Current Attachments**. Then, continue to the **Details and Consent** page.

The screenshot shows the same mobile application interface, but now the 'Attachments' tab is selected and highlighted with a red border. The 'Details and Consent' tab is also highlighted with a red border. A large text overlay reads 'Add Appointment of support person or organisation form'. Below this, there is a dark blue button with a camera icon and the text 'Add an image', which is highlighted with a red border. To the right of the button, it says 'You can add attachments up to 5MB'. Below the button, there is a section titled 'Current Attachments' with a table. The table has two columns: 'Attachment Name' and 'Size'. The table is currently empty.

7. The **Details and Consent** page appears.

Fill out all mandatory fields in the details section, including type of support required, and the start date of relationship.

< Back

Add an Agent Organisation

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

Organisation details

- About
- Attachments
- Details and Consent

The following fields are mandatory or invalid:
- Consent from relevant parties to establish support relationship

**All support workers at the organisation will be able to assist the client.
If the client only wants to work with one person that they already know, please enter their full name here.**

Full name of the support person

Support required *

Please select a start date for this relationship, and enter an end date if it will be time limited.

Start date *
 📅

End date
 📅

Fill out all mandatory fields in the consent section, and consent from both the client and the support organisation.

Then, select **Create Relationship**.

< Back

Add an Agent Organisation

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

Organisation details

- About
- Attachments
- Details and Consent

Consent

Has Ace Sharp consented to Bungun Aged Care & Disability Services / Bungun Aged Care & Disability Services Elder Care Support accessing their information in My Aged Care in order to assist them to make decisions as their agent. *

I declare that:

- I am voluntarily appointing an agent.
- The information I provide to My Aged Care is complete and correct.

I authorise My Aged Care, including Commonwealth funded service providers and assessors to:

- Collect information about me from my agent.
- Discuss my progress in My Aged Care with my agent.

I understand that:

- Making this Appointment will create a Client Record for me in My Aged Care, if I don't already have one.
- This Appointment is specific to interactions with My Aged Care.
- My agent may receive correspondence about me from My Aged Care.
- I can cancel this Appointment at any time by calling My Aged Care on 1800 200 422 or through my Online Account.
- Giving false or misleading information is a serious offence.

Has Bungun Aged Care & Disability Services / Bungun Aged Care & Disability Services Elder Care Support consented to assist Ace Sharp in My Aged Care, and acknowledged the declaration below.

8. The organisation relationship is created. Click **Go Back** to return to the client record.



Harry Boyer

Add an Agent Organisation

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

Organisation details

- About
- Attachments
- Details and Consent

Relationship created successfully

Return to client

Go Back

9. Once on the client's record, the new organisation relationship will be visible.

Client | Assessment | Support Plan

Finalise | Upload | Quick notes | More options

- Client Profile
- Contact Details
- Support Network and Cohabitants**
- Wallet check
- Event summary and Approvals
- Attachments
- Notes

Support Network and Cohabitants

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

Organisations that support Adamo Johnsn

Pending ⚠

- > Organisation Two - Jane Doe - Agent (Other) **Remove**

Active

No relationships found

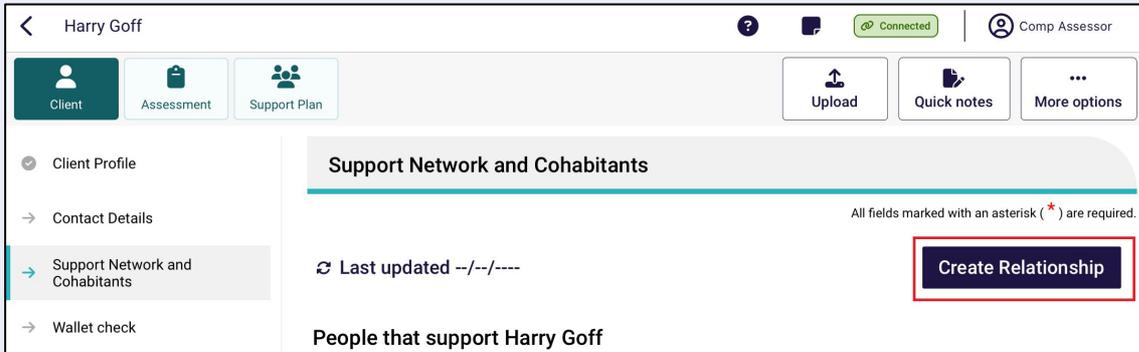


11.3 Creating a relationship for a carer or other support people

You can create a relationship for the client with a carer, emergency contact, GP (General Practitioner) or support person.

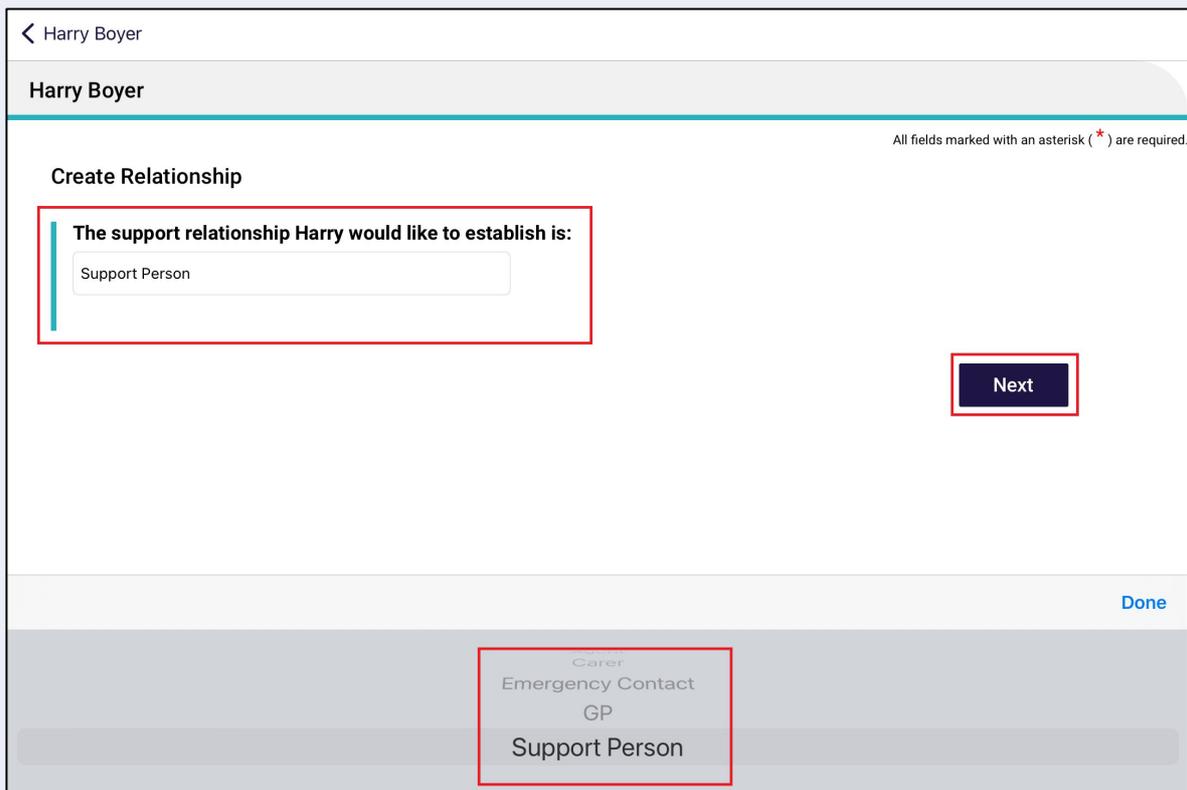
Please note, the support person does not have to be present, and consent is not required.

1. On the client's **Support Network and Cohabitants** page in client details, select **Create Relationship**.



2. In the **Create Relationship** page, choose a relationship to establish for the client. In this case it would be **Carer**, **Emergency Contact**, **GP** or **Support Person**.

Then, select **Next**. Depending on the relationship chosen, the following steps may vary.



3. Search for your support person by entering **Last name, First name** and/or **Aged Care User ID**, then select **Search**. You can also select **Advanced search**.

Find a support person

Before registering a new client, check the client exists

First name Last name Aged Care ID

AC eg. 12345678 0/8

> Advanced search

Search

Select your support person, then go to step 5.

If you cannot find the support person's record, try other search parameters or select **Register a Support Person**, then go to step 4A.

Search results

Results 1 found - search again, select an existing client or register a new client. If you can't find the Support person record, try other search parameters or

Register a Support Person

Harry Miller Active

33 HARTLEY Street, ALICE SPRINGS, NT 0870

Aged Care ID AC39066840

Phone

Assessment status

4A. To register a new support person, Enter all mandatory fields in each of the pages shown with red asterixs, and until the **Register** button turns blue. Then, select **Register** and go to Step 8.



Search Results

Register a Support Person

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

- Personal details
- Address details
- Identity Match
- Details and Consent

Representative's name

Title
Dr

First name *
Harry 5/50

Middle name
0/50

Last name *
Miller 6/50

Gender *
Not Specified

Date of birth / estimated age*
Please enter the date of birth. If not known, enter the client's estimated age.

Date of Birth Estimated Age

Estimated age *

Register

4. To create a carer as the support person, you will be required to follow the previous steps and select **Carer** and search or create a new record. Once you have completed these steps, the carer will have the following details are shown in the About page of **Support Person Details**. Go to the next page: **Call back details**.

Harry Miller's Details

- About
- Call back details
- Details and Consent

Personal Information
Born 1st July 1938

Communication requirements
No communication requirements provided

Identity documents (ID)

Medicare	
DVA	
CRN	
ACMPS	
SPARC ID	
Aged Care ID	AC38402301

Identity status
Not Attempted

Health Insurance
No health insurance provided

Address details
Home address: No address found

Create relationship



5. The **Call back details** page displays.

Fill in all mandatory fields and go to the next page, **Details and Consent**.

! To successfully register call back details, the client's contact details must be registered on the Call back details page. This includes phone number/s and home address.

If the details are not there, go back to the client's profile to fill them in.

Harry Miller's Details

→ About

→ Call back details

→ Details and Consent

Request call back from National Dementia Helpline *

Yes No

Client's consent for National Dementia Helpline *

Yes No

Carer's consent for National Dementia Helpline *

Yes No

Client contact details

Contact number +6104

Email address

Home address Level 1, 260 ELIZABETH Street
SURRY HILLS
NSW 2010

Carer contact details

Contact number 04 (mobile)

Email address

Home address 12 FURZER Street
PHILLIP
ACT 2606

Create relationship

6. The **Details and Consent** page displays. Fill in all mandatory fields, then select **Create relationship**.

Harry Miller's Details

→ About

→ Call back details

→ Details and Consent

Details

Relationship type *

Friend

Consent

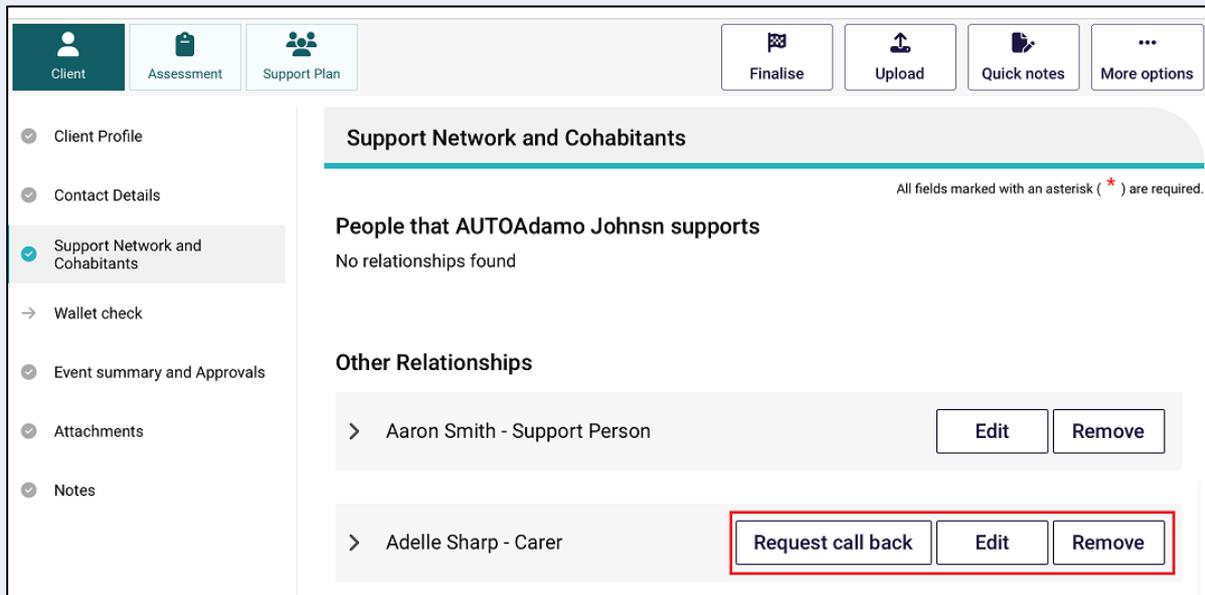
Not required

Create relationship



8. The support person relationship is now displayed on the client's **Support Network and Cohabitants** page.

In the case of a carer relationship, there are two additional buttons: **Edit** which edits contact details, and **Request call back** which registers call back consent.



11.4 Creating a relationship in offline mode

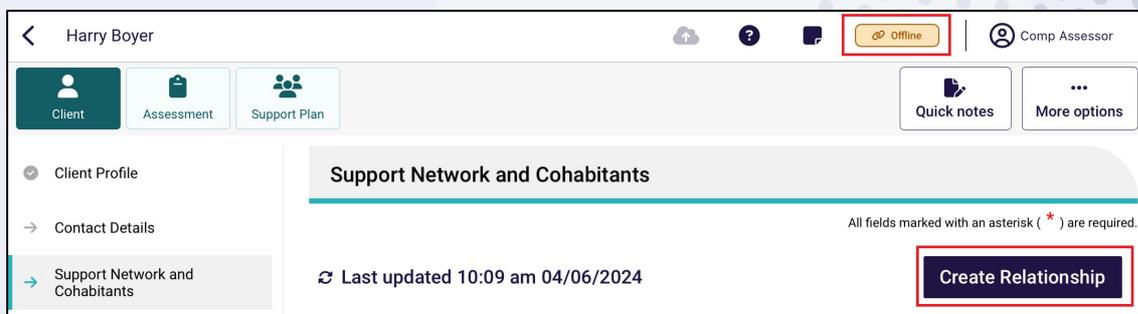
To create a representative, agent or support person while the App is in offline mode, follow the steps below.

! You must be online to register and set up a relationship. Any support people created offline will be saved locally to your device. Relationships created offline will have a visual indicator to identify that they have been created locally to the device.



You must register the relationship before you can upload the assessment. To do this select **Register** against the local record and follow [step 4A in Section 12.3 \(Creating a relationship for a carer or other support people\)](#).

1. Navigate to the **Support Network and Cohabitants** section and select the **Create Relationship** button.



2. Fill in all the representative's mandatory information until each page has a tick next to it, then select the **Save** button.

! **Authorized Representative relationships are created as Pending only. Use the **Assessor Portal** to complete [activating the relationship](#).**

< Back

Register a Support Person

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

- Personal details
- Address details
- Identity Match
- Attachments
- **Details and Consent**

Details

Authorized Representatives can only be created as pending. Complete the process to activate the relationship on the Assessor portal.

Make decisions about

Financial

Relationship type *

Neighbour

Please select a start date for this relationship, and enter an end date if it will be time limited.

Start date *

04/06/2024

End date *

Consent

Has this support person consented to register? *

Save

3. A banner – **Local Relationship saved successfully** appears. Select **Go Back**.

< Harry Boyer

Register a Support Person

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

- Personal details
- Address details
- Identity Match
- Attachments
- **Details and Consent**

Local Relationship saved successfully
Return to client

Go Back

4. The new representative or support person will appear on the **Relationships and cohabitants** page.

In the case of authorised representatives, a banner appears: **Some relationships cannot be activated via the App. Please finalise these on the Assessor portal.**



11.5 Activating a pending relationship

A Pending Relationship is created on a client's record when

- If either the client or representative (regular representatives and agents only) do not provide their consent for the relationship to be set up; or
- The start date of the relationship is in the future; or
- An Authorised representative relationship is being created.

! A warning symbol  will be displayed pending **Support Network and Cohabitants** menu item when a client has pending relationships that need to be confirmed.

To activate a pending relationship, follow the steps below. You **must** be connected to the Internet.

1. In the client's **Support Network and Cohabitants** page, select **Activate**.

Abigail Smith

Client Profile

Contact Details

Support Network and Cohabitants

Wallet check

Event summary and Approvals

Attachments

Notes

Support Network and Cohabitants

All fields marked with an asterisk (*) are required

Some relationships cannot be activated via the Aged Care Assessor application. Please finalise these on the Assessor portal.

Refresh relationships Last updated 2:07 pm 13/02/2025 Create Relationship

People that support Abigail Smith

Pending ⚠️

> Ali Sharp - Representative (Regular) Opt-out **Activate** Remove

2. From the **Activation** page, update the support person's consent as required then select **Activate**.

Abigail Smith

Activation

All fields marked with an asterisk (*) are required

- Making this Appointment will create a record for me and the person I am representing in My Aged Care, if either I or the person I am representing don't already have one.
- This Appointment of Representation is specific to interactions with My Aged Care.
- My personal information is collected by My Aged Care and shared with any assessors, service providers, organisations or medical professionals, that are supporting the person I represent.
- My name and telephone number will be shared with all other appointed support persons and organisations, for the purpose of enabling me to assist the person I represent in My Aged Care.
- If I am the nominated Primary Contact, I will be the first point of telephone contact for My Aged Care for the person being represented.
- I can cancel this Appointment at any time by calling My Aged Care on 1800 200 422 or through my Online Account.
- I must inform My Aged Care of any changes to my address and contact details, and changes in the circumstances of the person who has appointed me.
- Giving false or misleading information is a serious offence.
- I will receive correspondence from My Aged Care on behalf of the person I represent.

I acknowledge:

- By accepting this relationship, I will transition to a supporter role on 1 July 2025 under the Aged Care Act 2024. I will act in accordance with the duties and obligations specified under the Aged Care Act 2024. For more information, please visit <https://www.myagedcare.gov.au/arranging-someone-support-you>.

Yes No

Activate

The **Activation** page will then change to display a banner which confirm that the relationship has been successfully activated. The relationship will now show as active in the client's support network and cohabitants tab.

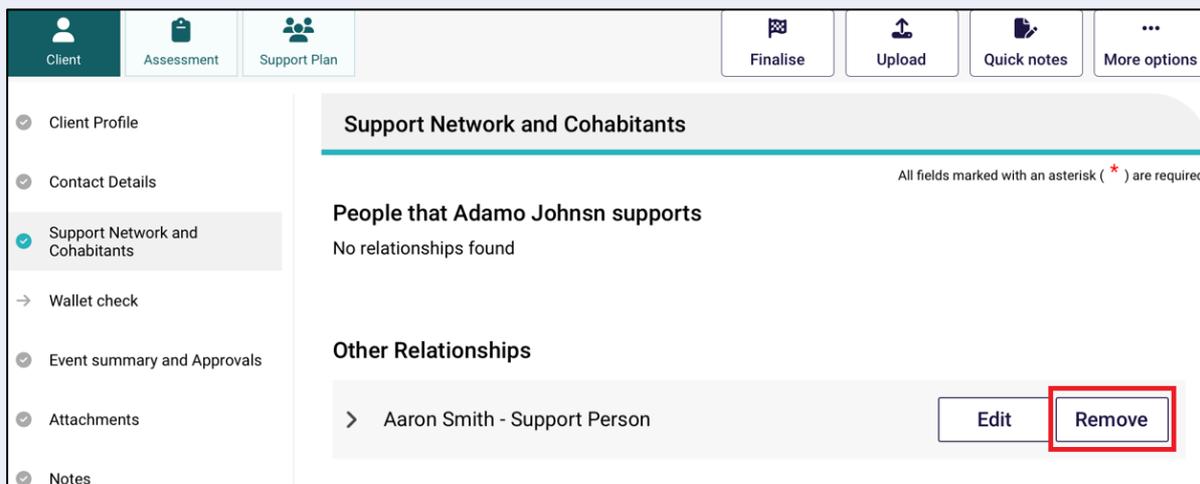
Please note Authorised Representative relationships can only be activated through the Assessor portal.



11.6 Removing a support relationship

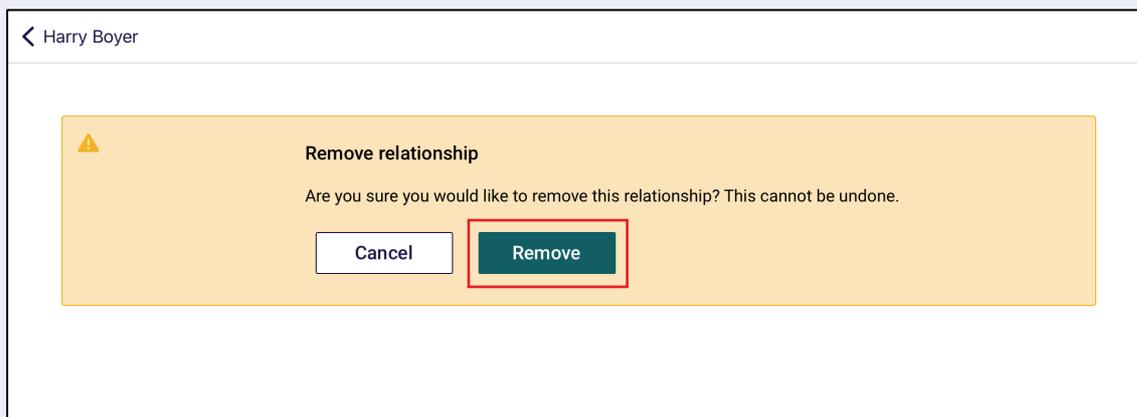
To remove an active or pending relationship:

1. Select the **Remove** button on the support person's card.



The screenshot shows a software interface for managing support relationships. At the top, there are tabs for 'Client', 'Assessment', and 'Support Plan', along with action buttons for 'Finalise', 'Upload', 'Quick notes', and 'More options'. The left sidebar contains a list of menu items: 'Client Profile', 'Contact Details', 'Support Network and Cohabitants' (selected), 'Wallet check', 'Event summary and Approvals', 'Attachments', and 'Notes'. The main content area is titled 'Support Network and Cohabitants' and includes a note: 'All fields marked with an asterisk (*) are required.' Below this, there are two sections: 'People that Adamo Johnsn supports' (showing 'No relationships found') and 'Other Relationships'. In the 'Other Relationships' section, there is a card for 'Aaron Smith - Support Person' with 'Edit' and 'Remove' buttons. The 'Remove' button is highlighted with a red box.

2. Select **Remove** in the confirmation window will open.



The screenshot shows a confirmation dialog box titled 'Remove relationship'. It contains a warning icon and the text: 'Remove relationship' and 'Are you sure you would like to remove this relationship? This cannot be undone.' Below the text are two buttons: 'Cancel' and 'Remove'. The 'Remove' button is highlighted with a red box.

3. Removed relationships will show under the **Declined and ended relationships** section in the Support Network and Cohabitants section.

11.7 Opting out of relationships

Clients and representatives can choose to opt-out of an existing representative relationship. Alternatively, this will occur automatically on 30 June 2025, to coincide with the introduction of the Aged Care Act 2024 on 1 July 2025, which will change the responsibilities of these relationships.

1. From the **Support Network and Cohabitants** select the **Opt-out** button next to the representative relationship the client or representative wants to opt-out of.

AUTOAdamo Johnsn

Client Profile

Contact Details

Support Network and Cohabitants

Wallet check

Event summary and Approvals

Attachments

Notes

Support Network and Cohabitants

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

Refresh relationships Last updated 11:09 am 30/01/2024 Create Relationship

People that support AUTOAdamo Johnsn

Pending No relationships found

Active

> Ace Sharp - Representative (Regular) Opt-out Edit Remove

- From the **Opt-out of relationship** page select the person initiating opting-out of the relationship.

Adamo Johnsn

Opt-out of relationship

You are about to opt-out of a relationship between AUTOAdamo Johnsn and support person Ace Sharp. This will be reflected in your records immediately.

* Please select the person initiating opting-out

Adamo Johnsn (Client)

Ace Sharp (Representative Regular)

- Select the reason for opting-out of the relationship.

Adamo Johnsn

Opt-out of relationship

You are about to opt-out of a relationship between AUTOAdamo Johnsn and support person Ace Sharp. This will be reflected in your records immediately.

* Please select the person initiating opting-out

Adamo Johnsn (Client)

* Please select the reason for opting-out of this relationship

Done

Have other supporter
Relationship not required
One of the parties is deceased
Withdrawal of relationship

- The client or representative will then have the option to remove the relationship now if they wish. To do this, select the **I would like to remove the relationship now** radio button and then click **Opt-out and remove**. This will then remove the relationship.

Opt-out of relationship

You are about to opt-out of a relationship between AUTOAdamo Johnsn and support person Ace Sharp. This will be reflected in your records immediately.

* Please select the person initiating opting-out

Ace Sharp (Representative Regular)

* Please select the reason for opting-out of this relationship

Unable to perform duties

I would like to remove this relationship now

i Ace Sharp you are withdrawing your consent to access information on behalf of Adamo Johnsn within My Aged Care.

Cancel Opt-out and remove

Alternatively, the **I would like to remove the relationship now** radio button can remain unticked



if the client or representative would like to maintain the relationship until being opted out on 30 June 2024. Select **Opt-out** to finalise the request.

< Abigail Smith

Opt-out of relationship

You are about to opt-out of a relationship between Abigail Smith and support person Aadi Smith. This will be reflected in your records immediately.

*** Please select the person initiating opting-out**

Abigail Smith (Client) 

*** Please select the reason for opting-out of this relationship**

Have other supporter 

I would like to remove this relationship now

Cancel **Opt-out**



12. Completing identity verification

To conduct identity verification (a wallet check), follow the steps below.

1. Open and log in to the App with your password, following the process in [Signing in to the App after activation](#). The Dashboard will be displayed. Select the client's name on the referral card.

The dashboard shows a grid of client cards. The card for Harry Boyer is highlighted with a red border. The dashboard includes filters, a 'Connected' status, and a user profile 'Comp Assessor'.

Client Name	Referral Status	Priority	Assessment Status	Assessment Type	First Clinical
Jonas Abdullah	Self referral	Medium priority	Triage in progress	Comprehensive	18 days overdue
Jonas Abrego	Self referral	Medium priority	Triage not started	Comprehensive	18 days overdue
Harry Boyer	Self referral	Low priority	Assessment in progress	Comprehensive	No current milestone
Harry Cleora	Self referral	High priority	Triage not started	Comprehensive	26 days overdue
Harry Goff	Self referral	Medium priority	Triage in progress	Comprehensive	7 days overdue
Harry Jones	Self referral	Medium priority	Assessment not started	Comprehensive	18 days overdue
Harry Miller	Self referral	Low priority	Assessment not started	Comprehensive	
Harry Nichols	Self referral	Low priority	Triage not started	Comprehensive	
UATFred RTAGT...	Assessment not started	High priority	Assessment not started	Comprehensive	

2. Select **Wallet check**. The status of the wallet check will be displayed. To conduct a wallet check select **Conduct a wallet check**.

The 'Wallet check' screen for Harry Boyer shows a notification that the client has not yet completed a wallet check. A button labeled 'Conduct a wallet check' is highlighted with a red border. The left sidebar shows navigation options like Client Profile, Contact Details, and Wallet check.

Client Profile

Contact Details

Support Network and Cohabitants

Wallet check

Event summary and Approvals

Attachments

Notes



3. A page is displayed to record whether the client has identification that will allow you to complete the process.

Harry Boyer

Client Assessment Support Plan

Upload Quick notes More options

Client Profile

Contact Details

Support Network and Cohabitants

Wallet check

Event summary and Approvals

Attachments

Notes

Wallet check

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

My client has identification

My client has no valid ID at this time

My client is unable to produce ID

Cancel Complete

If you have selected:

- **My client has identification**, go to step 4.
- **My client has no valid ID at this time** you will receive a message confirming that a wallet check should be completed at a later date. Go to step 5.

Harry Boyer

Client Assessment Support Plan

Upload Quick notes More options

Client Profile

Contact Details

Support Network and Cohabitants

Wallet check

Event summary and Approvals

Attachments

Notes

Wallet check

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

My client has identification

My client has no valid ID at this time

My client is unable to produce ID

i You are recording that at this time the client has no valid identification and should be asked again in the future.

Cancel Complete

- **My client is unable to produce ID**, a message will be displayed to record that you are unable to complete the wallet check and that it will not be able to be completed at a future date, go to step 5.



Harry Boyer

Client Profile

Wallet check

My client has identification

My client has no valid ID at this time

My client is unable to produce ID

You are recording that the client cannot complete a wallet check and should not be asked again in the future.

Cancel Complete

4. The page will be expanded to allow you to record the type of documentation sighted, and the date that you performed the wallet check. You will need to sight at least two types of identification to complete the wallet check.

Harry Boyer

Client Profile

Wallet check

My client has identification

My client has no valid ID at this time

My client is unable to produce ID

Please check two types of ID from the following list. If you do not select two documents, the wallet check cannot be uploaded, and the information will be discarded during the upload process. By ticking each box, you are confirming that you have sighted the original document.

Common types of identification

Medicare Card

DVA Card

Drivers License

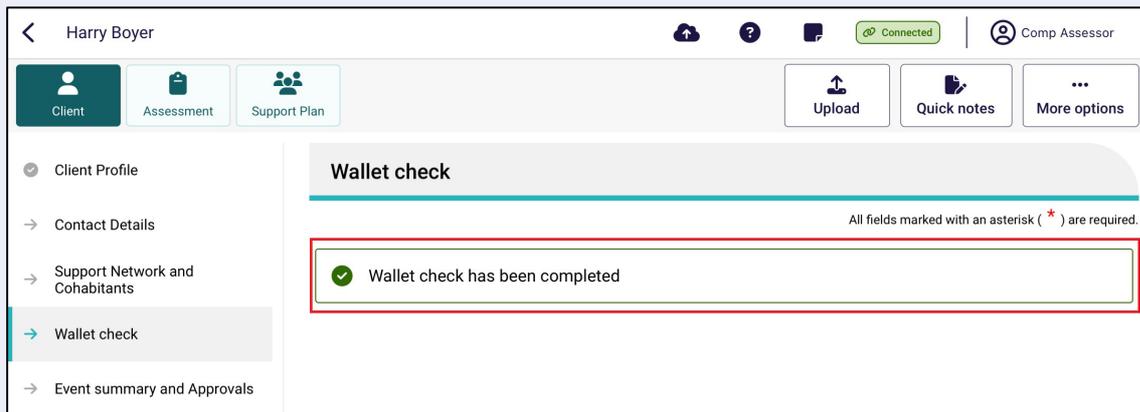
Health Care Card

Passport

! Select **Show more types of identification that can be sighted** to display additional identity documents that may be used for identity verification, for example, Birth Certificate, Australian Aged Pension, Pensioner Concession Card etc.

5. Select **Complete**.

6. If you successfully completed the Wallet check an information message will display to confirm that the Wallet check has been completed.



! If you are unable to sight two identification documents (e.g. the client does not have valid ID), a reminder to complete a wallet check will display on the client record until a wallet check can be completed. This will not prevent you from completing an assessment.

13. Undertaking assessments

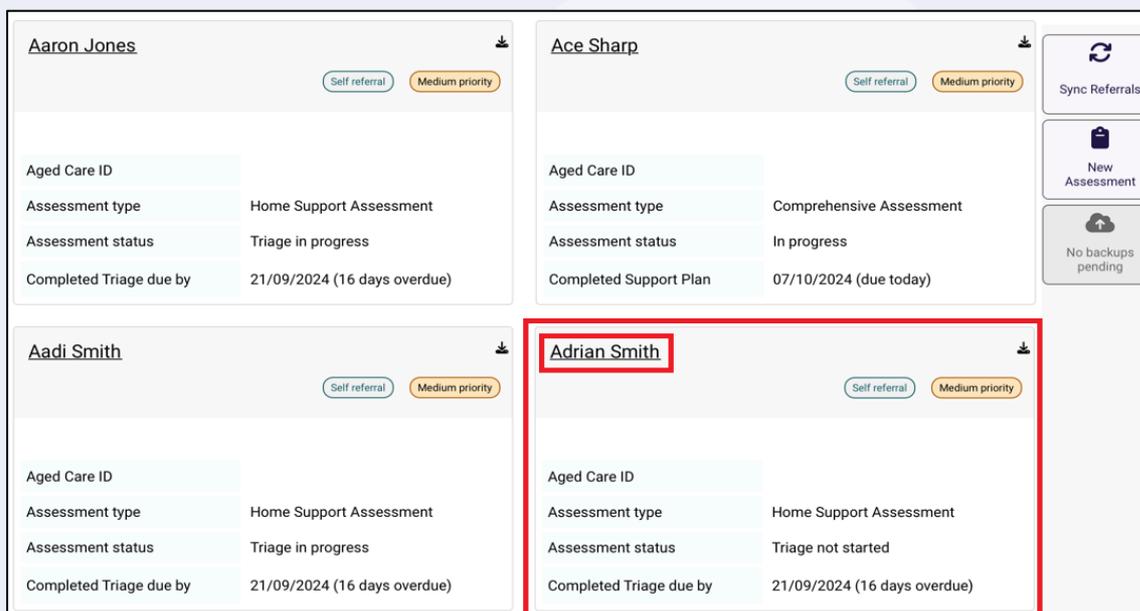
Needs assessors can use the App to:

- Undertake assessments for client's referrals they have downloaded.
- Undertake assessments for offline clients they have saved locally to their device.
- Undertake Residential Respite Assessment

! The App will display the same sections of the assessment that are available for assessors in the My Aged Care assessor portal.

The steps to undertake an assessment on the App are as follows.

1. Open and log in to the App, following the process in [Signing in to the App after activation](#). The Dashboard will be displayed. Then, select the clients name that you are wishing to assess.



2. Select **Start Assessment**.

Adamo Johnsn

Adamo Johnsn, AC76840883, born 17 January 1948, 77 Years.

Select an option to see more information.

Start Assessment Refer urgent services Remove from device

Assessment Consent

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

3. Select the relevant radio box for who has provided consent to the assessment as well as if you would like to pre-populate the IAT questions or start a blank assessment. Then select **Confirm**.

You are about to start a Comprehensive Assessment for Adamo Johnsn, AC76840883, born 17 January 1948, 77 Years. If the person's details are incorrect, a privacy breach may occur.

Please be advised that without capturing the consent, you cannot proceed any

Start Assessment Refer urgent services Remove from device

Assessment Consent

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

Consent obtained from?

The client The authorised representative

The client with support person Consent was not given

*** Would you like to pre-populate the IAT questions from previously collected information?**

Yes Blank assessment

Confirm

4. The **Assessment Details** page will display, and the assessment can be commenced from here.

For comprehensive assessors, the **First Intervention of a Clinical Nature** page will display.

Mandatory fields are identifiable by red asterisks, and prior to completing mandatory information a red triangle will display in the top right-hand side of the box. Once a mandatory question is answered, this triangle disappears. This feature helps to identify whether all mandatory questions have been answered in each section.



← Leonard Hofstedeer

Client Assessment Support plan

Connected Sheldon Cooper

Sync data Notes More options

● Triage

→ Assessment details

→ Reason for assessment

→ Carer profile

→ Medical and medications

→ Function

→ Mobility index

→ Physical, Personal health & Frailty

→ Social

→ Cognition

→ Behaviour

→ Psychological

→ Home and personal safety

→ Financial or legal

→ Support considerations

Assessment details

Fields marked with an * are mandatory

* Assessment date
dd/mm/yyyy

Participants consulted prior to the assessment?
Yes No

Mode of assessment
Face to face Over the phone Via tele health

Assessment setting
Select the location of the assessment

Information collected from

Aboriginal liaison officer Agent Care finders

Client Client's carer Client's representative

Health care professional Service provider Via interpreter

At the bottom of each page, Select the toggle to acknowledge that you have reviewed the information on the page and confirm that it is correct. Select **Next** to navigate to the next section of the assessment in the App.

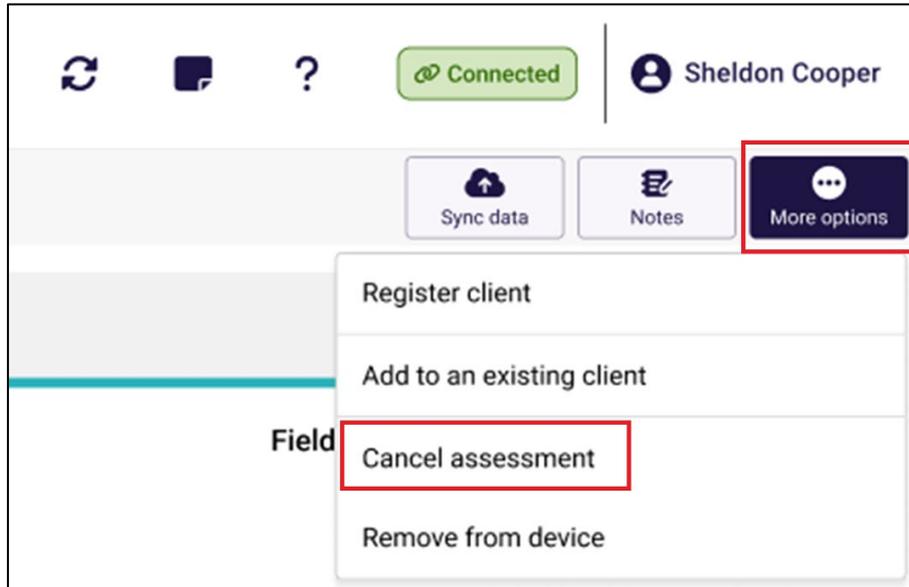
* I have reviewed the information on this page and I confirm that it is correct.

Back Next

! Cancelling an assessment

You can cancel an assessment from any screen within the App. Select **More options** from the top right of any screen, then select **Cancel assessment** from the pop up that appears.

If you cancel an assessment within the App, your team leader will receive a notification once you have internet connection, and your device has synced with the assessor portal.



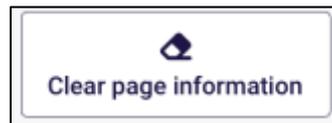
! Field text limits

There are character limits for free-text fields. The character limits will display at all times. Ensure that you do not exceed these character limits whilst undertaking the assessment.



! Clearing information

Selecting **Clear page information** on the top right of any screen will clear any information entered on the current page of the assessment that the Needs assessor is working on.



5. Progress through the sections identified in the Assessment menu. Similar to the My Aged Care assessor portal, a mandatory confirmation box must be completed at the bottom of each section.

A tick will appear beside the relevant section in the **Assessment** menu when all mandatory questions for that section are complete.

Leonard Hofstader

Client Assessment Support plan

Sync data Notes More options

Connected Sheldon Cooper

Triage

Assessment details

Reason for assessment

Carer profile

Medical and medications

Function

Mobility index

Physical, Personal health & Frailty

Social

Cognition

Behaviour

Psychological

Home and personal safety

Financial or legal

Support considerations

Function

Fields marked with an * are mandatory

General observations of client

Maximum 500 characters

* Conversation and direct interaction with the resident

Yes No

Please provide details

Maximum 500 characters

Mobility

Get to places out of walking distance

Without help With some help Completely unable

Who helps?

6. While progressing through the assessment, needs assessors may choose to use the **Quick notes** feature, which allows notes to be recorded on the App.

These notes could be sensitive in nature or may be notes that are for later reference during the assessment process.

Select **Quick notes** at the top right corner of the assessment screen to enter.

Connected Comp Assessor

Upload Quick notes Clear page information More options

7. Select **Done** to return to the assessment.

Assessment notes

Done

i

Add any notes related to this assessment.
The notes will not be saved with the assessment

Clear

0/4000

! Information captured in this section will not be uploaded to the assessor portal.

8. Adding health conditions in the App follow the same process as the assessor portal. Up to ten health conditions can be added in an assessment. To add a health condition select **Add health condition**.

Client

Assessment

Support Plan

Finalise

Upload

Quick notes

Clear page information

More options

You are conducting a Self Referral Assessment

- 🔒 Triage
- 📄 Assessment Details
- 📄 Reason for assessment
- 📄 Carer profile
- ➔ Medical and Medications
- ➔ Function
- ➔ Physical, Personal Health and Frailty

Medical and Medications

All fields marked with an asterisk (*) are required

*Does the client have any health conditions?

Yes

No health conditions present

Health Conditions

⚠️ Please add a Health Condition

Add health condition

From the Health condition page, you can then search by the condition name, code list of Health conditions or select by disease category. Select **Save** and close to add the health condition.

Health Conditions

Search by name or ACAP Code

OR

Select by Category

Select

***Health Conditions Description**

0/500

***Diagnosis status**

Client reported
GP confirmed
Hospital confirmed
Other health practitioner confirmed

Primary Health Condition

Remove health condition **Save and close**



- In the IAT assessment, validated assessment tools and questions will trigger based on the information recorded by the needs assessor during the assessment. These validated assessment tools are now integrated into the tool, and it will be listed automatically under the relevant section of the assessment that you are completing with the client.

! You should review the MAClearning element Validated Assessment Tools in Practice for further guidance on how and when to administer them with a client during the assessment.

- Threshold questions are also used throughout IAT to trigger moving the assessment into clinical/comprehensive areas. These questions are identified by a purple icon with text outlining the need for completion under your organisation's clinical governance.

For non-clinical needs assessors, these questions can only be completed with clinical attendance. To proceed in answering these questions under supervision, non-clinical needs assessors must select the **Clinical Supervisor** button from the top banner.



Non-clinical needs assessors must then confirm if they are completing the questions under clinical attendance and select the supervising assessor from the list. Once completed, select **Confirm** to continue. You will be re-directed back to the assessment when you can proceed to complete the assessment with clinical attendance.

Clinical declaration and supervisor details

*** I confirm that I am completing Clinical questions of the IAT under my organisation's clinical governance**

Select a supervising assessor for clinical assessment

[Done](#)

Landry Little

Allen Jarvis

Holland Baldwin

11. As needs assessors are progressing through the assessment they can indicate which Needs (Functional needs, Other considerations, Complexity Indicators) and some recommendations to be addressed in the support plan, by selecting **Add as Functional Need**, **Add as Complexity Indicator**, **Add as Other Consideration** and **Add as recommendation** next to the relevant question.

- Carer profile
- Medical and Medications
- Function
- De Morton Mobility Index (DEMMI) - Modified
- Physical, Personal Health and Frailty
- Social
- Cognition
- Behaviour
- Psychological
- Home and Personal Safety
- Financial or Legal
- Support Considerations

Home and Personal Safety

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

Home safety equipment client has

Add as Other Consideration

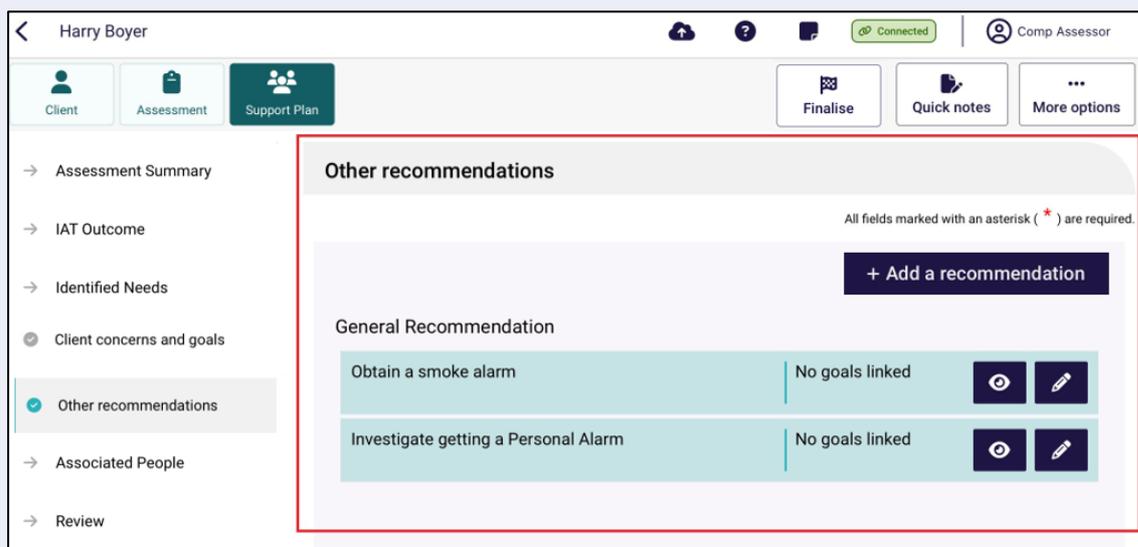
Smoke alarm(s)

Add as Recommendation

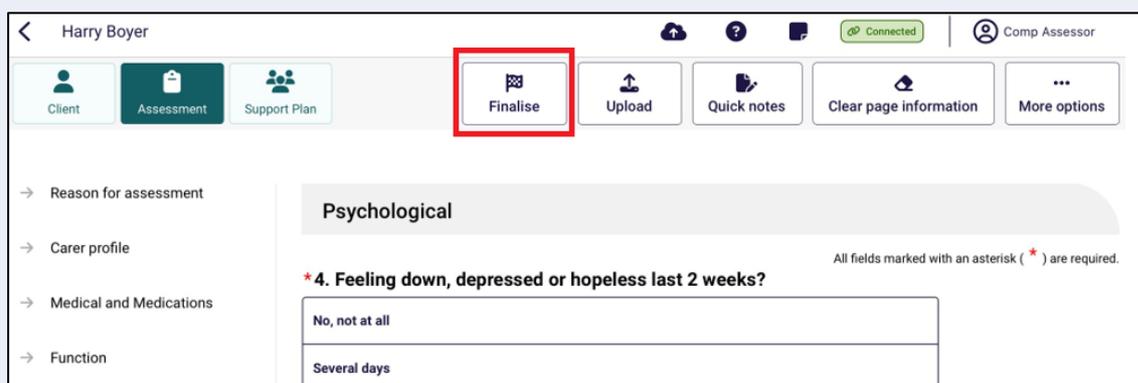
Personal alarm

Add as Recommendation

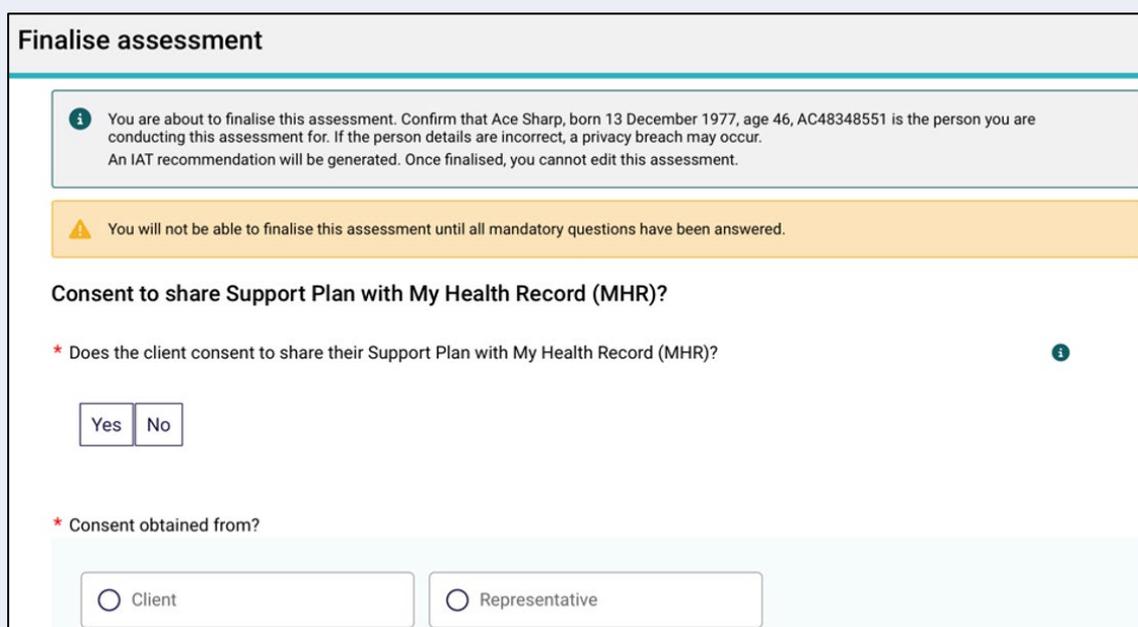
12. Any functional needs, other considerations, complexity indicators and recommendations will be displayed in the [Support Plan](#) section of the app.



13. To finalise the assessment, select **Finalise** at the top of the assessment screen.



14. Before finalising the assessment, the client can opt to share their Support Plan via their My Health Record. Select **Yes** or **No** based on the client's response.



If consent was obtained from a representative, you will also be required to enter their first name before proceeding.

Select **Finalise** to continue. Please note, you will only be able to select **Finalise** once all mandatory fields have been completed.

Finalise assessment

* Consent obtained from?

Client Representative

* Who provided consent?

* First name 0/50

Last name 0/50

Comments
Maximum 150 characters

15. A pop-up will then display asking you to finalise the assessment. Please note once you finalise the assessment it cannot be edited. Select **Finalise** to continue.

Finalise assessment

Warning: You are about to finalise this assessment.
An IAT recommendation will be generated.
Once finalised, you cannot edit this assessment.



14. Developing a support plan

At any point after a client's assessment has been commenced, their support plan can be created and developed within the App.

! Needs assessors will still be required to upload client assessment and Support Plan information to the assessor portal in order to submit to the delegate for approval or match and refer for services.

The sections of the support plan in the App are aligned with the support plan tabs in the assessor portal, and needs assessors can record:

- Assessment Summary
- IAT Outcome
- Identified Needs
- Concerns and goals
- Recommendations
- Associated people
- Review

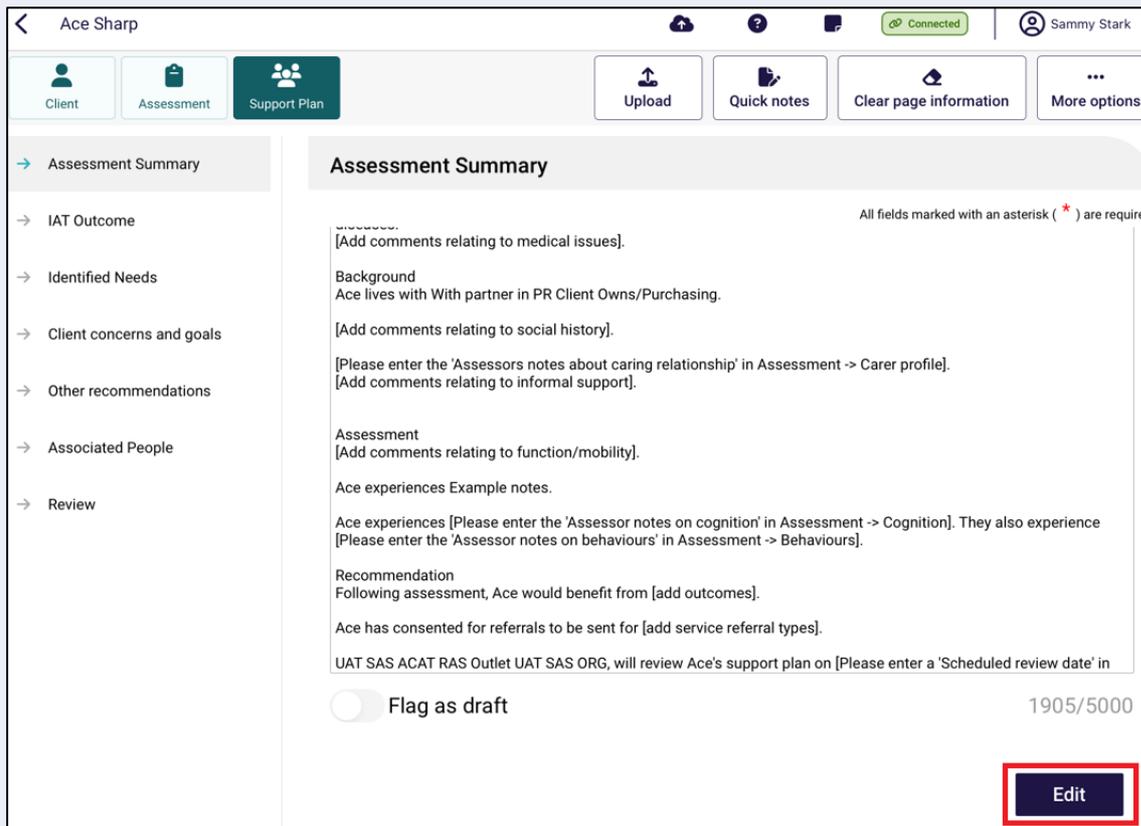
! For further guidance on completing a client's support plan, follow the steps outlined in the [Assessor Portal User Guide 7 completing a support plan and support plan review](#).

1. To commence a support plan for a client who you are assessing, select the client card, and select **Support Plan** from the top left menu. The **Assessment summary** will display.

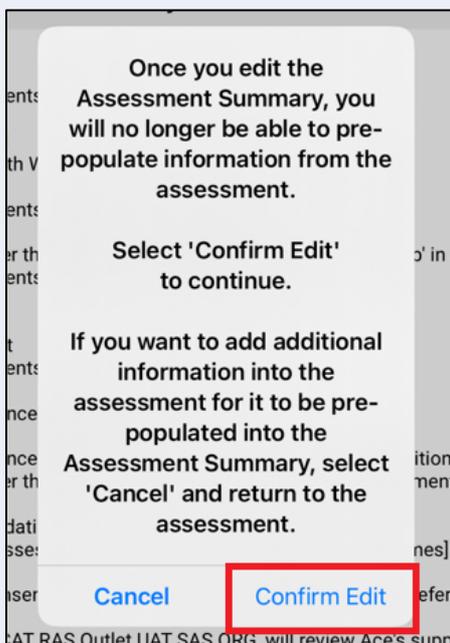
The Assessment summary will be pre-filled with information captured during the assessment.

The screenshot shows the 'Support Plan' section of the app for a client named 'Ace Sharp'. The 'Support Plan' tab is highlighted in the top navigation bar. Below it, the 'Assessment Summary' tab is selected in the left-hand menu. The main content area displays the 'Assessment Summary' form, which is pre-filled with information from the assessment. The form includes sections for 'Background', 'Assessment', and 'Recommendation'. The 'Background' section contains text about the client's living situation. The 'Assessment' section contains text about the client's experiences. The 'Recommendation' section contains text about the client's needs and consent. The form also includes a 'Flag as draft' toggle and a character count '1905/5000'. An 'Edit' button is located at the bottom right of the form.

2. To edit the assessment summary, select **Edit**.



3. Select **Confirm Edit** at the pop up that appears. Note that once you start editing the assessment summary, you will no longer be able to pre-populate information from the assessment.



You will then be able to Flag as draft by the toggle function. There will be a **D** icon next to the Assessment Summary menu, to remind users that the assessment summary is a draft and should be completed prior to uploading to the assessor portal.

15. IAT outcome

Within the support plan tab, the needs assessors will be able to view a suggested support recommendation for the type of care the client may require. The algorithm will draw on assessment responses and the client's current care approvals and recommend either the Commonwealth Home Support Programme (CHSP) or a Home Care Package (HCP).

If the IAT assessment has not been finalised, then the IAT Outcome will display as Pending finalisation.

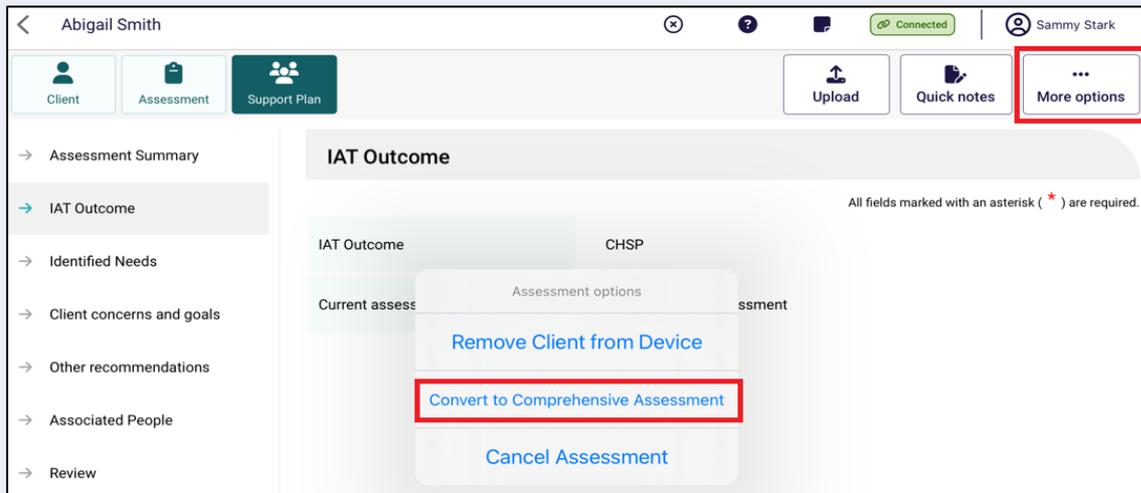
The screenshot shows the 'IAT Outcome' section of the 'Support Plan' tab for 'Ace Sharp'. The 'IAT Outcome' field is set to 'Pending finalisation' and the 'Current assessment type' is 'Comprehensive Assessment'. A note states: 'All fields marked with an asterisk (*) are required.' The left sidebar contains navigation options: Assessment Summary, IAT Outcome (selected), Identified Needs, Client concerns and goals, Other recommendations, Associated People, and Review. The top navigation bar includes 'Client', 'Assessment', and 'Support Plan' tabs, along with 'Finalise', 'Upload', 'Quick notes', and 'More options' buttons. The user 'Sammy Stark' is logged in.

Once the IAT assessment has been finalised the IAT Outcome will display.

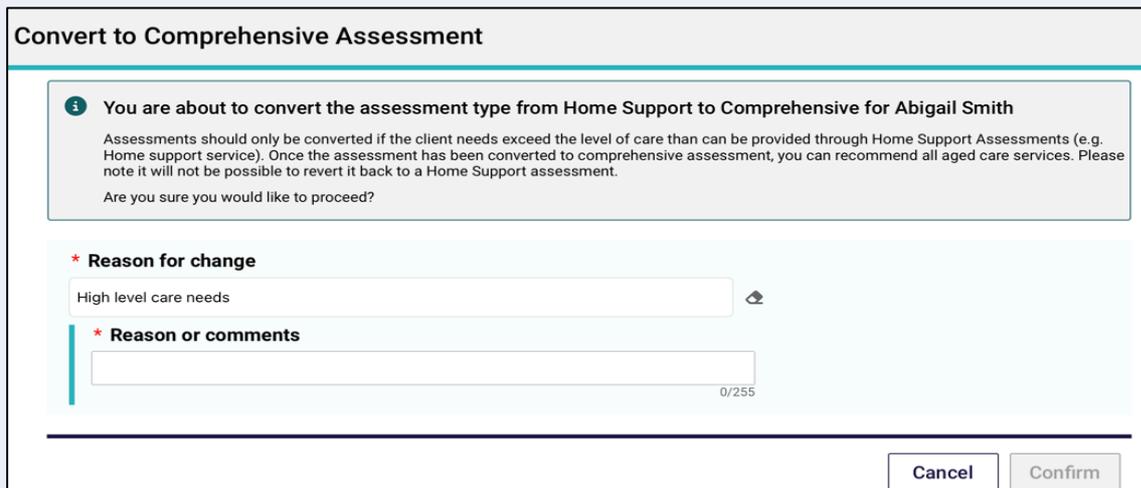
The screenshot shows the 'IAT Outcome' section of the 'Support Plan' tab for 'Ace Sharp'. The 'IAT Outcome' field is now set to 'CHSP' and the 'Current assessment type' remains 'Comprehensive Assessment'. A note states: 'All fields marked with an asterisk (*) are required.' The left sidebar and top navigation bar are identical to the previous screenshot.

If required, home support assessments can be converted to a comprehensive assessment after the IAT assessment has been finalised. If an assessment is triaged as a home support assessment and Home Care Package services, residential care or short-term restorative care are recommended, the assessment will need to be converted to a comprehensive assessment under the supervision of a staff member who holds a clinical assessor role in the My Aged Care Assessor Portal.

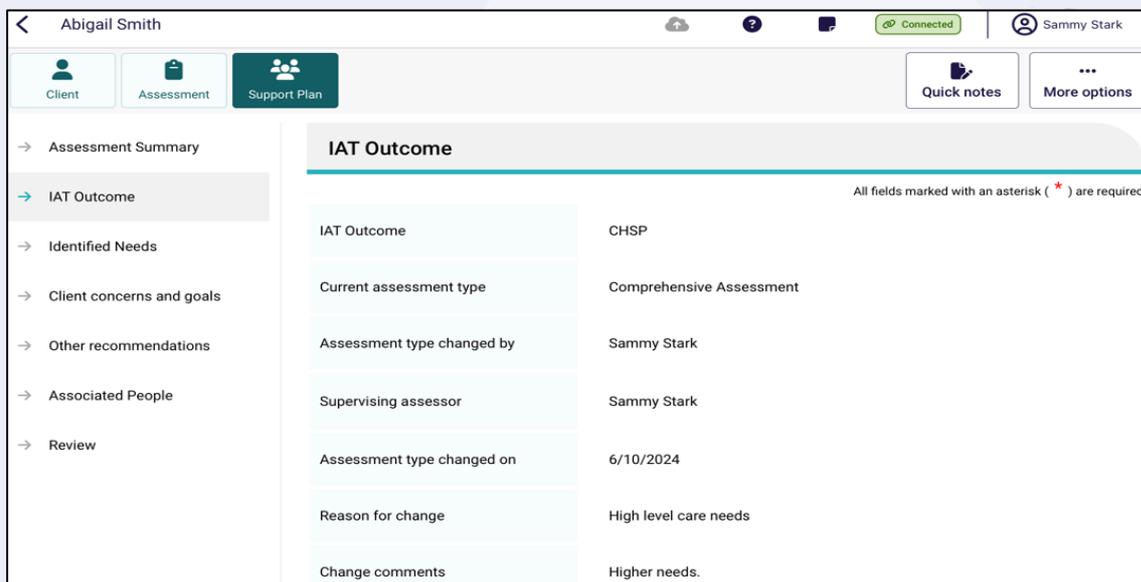
To do this, select the **More options** button followed by **Convert to Comprehensive Assessment**.



From the Convert to Comprehensive Assessment page, enter the reason or comments for converting the assessment. Please note the reason for change will be auto-populated to High level care needs. Select **Confirm** to convert the assessment.



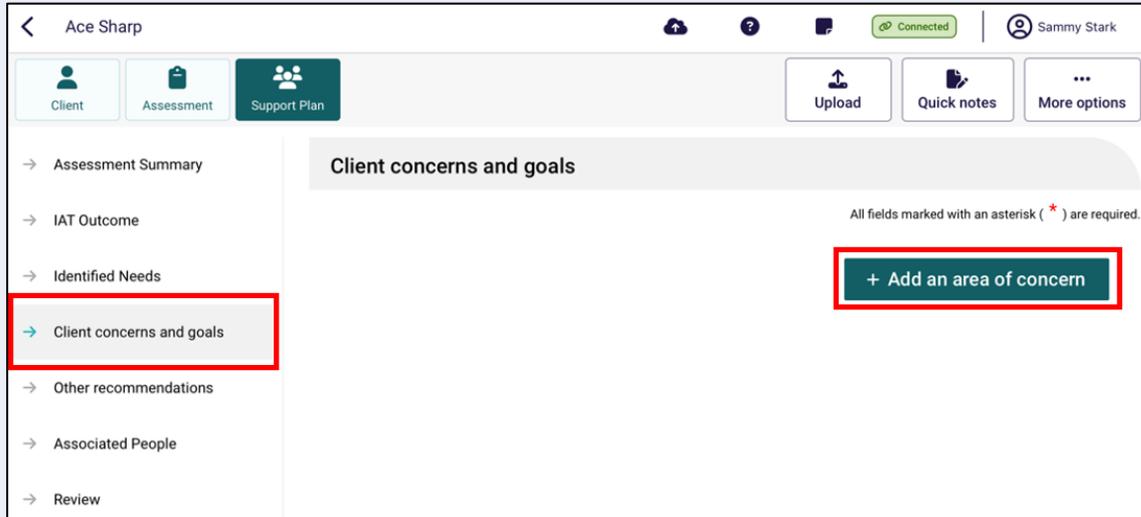
The **IAT Outcome** tab will then display that the assessment has been converted to a Comprehensive Assessment.



16. Adding concerns, goals and recommendations

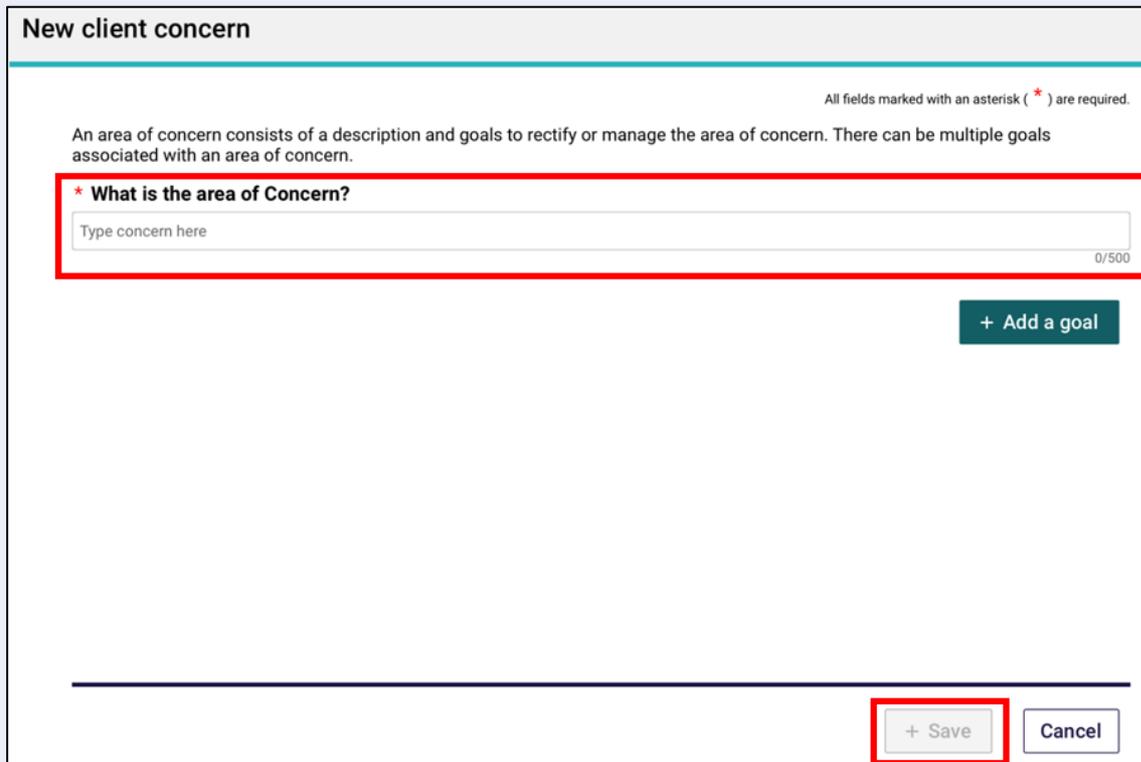
When developing a client's support plan in the App, Areas of Concern and Goals, and Recommendations can be added in the **Concerns and goals** and **Recommendations** section of the Support Plan.

1. To add an area of concern, select **+ Add an area of concern**.



The screenshot shows the 'Client concerns and goals' section of the app. The left sidebar contains a menu with options: Assessment Summary, IAT Outcome, Identified Needs, Client concerns and goals (highlighted with a red box), Other recommendations, Associated People, and Review. The main content area is titled 'Client concerns and goals' and includes a note: 'All fields marked with an asterisk (*) are required.' A red box highlights a button labeled '+ Add an area of concern'.

2. Enter in **What is the area of concern** and click **+Save**. Please note you will only be able to save the concern once all mandatory information has been entered.



The screenshot shows the 'New client concern' form. It includes a title 'New client concern' and a note: 'All fields marked with an asterisk (*) are required.' Below this is a descriptive text: 'An area of concern consists of a description and goals to rectify or manage the area of concern. There can be multiple goals associated with an area of concern.' A red box highlights the mandatory field: '* What is the area of Concern?' with a text input area containing the placeholder 'Type concern here' and a character count '0/500'. Below the input area is a '+ Add a goal' button. At the bottom of the form, there are two buttons: '+ Save' (highlighted with a red box) and 'Cancel'.

3. Select **Edit** to update or delete the area of concern or change the order of areas of concern using the arrow buttons (▲▼) where you have added multiple concerns.

← Leonard Hofstader

Client Assessment Support plan

Sync data Notes More options

Concerns and goals

1 At vero eos et accusamus et iusto odio dignissimos ducimus qui blanditiis praesentium voluptatum deleniti atque corrupti quos dolores et quas molestias excepturi sint occaecati cupiditate non provident, similique sunt in culpa qui officia deserunt mollitia animi, id est laborum et dolorum fuga.

+ Add an area of concern

First area of concern

Edit ▲ ▼ ✕

Not started

^ 1 Goal

Not started

Strengths and abilities

Areas of difficulty

Motivation 10

4. To add a goal to a recommendation, select **+ Add a goal** from the relevant area of concern and click **+ Save**.

New client concern

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

An area of concern consists of a description and goals to rectify or manage the area of concern. There can be multiple goals associated with an area of concern.

* What is the area of Concern?

Type concern here 0/500

+ Add a goal

+ Save Cancel

- Enter what the goal is along with other key information such as what domain the goal relates to, the client's current strengths and abilities in relation to the goal and their motivation to achieve it.

Adding a goal

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

What is the area of concern?

Client mobility

*** What is the client's goal?**

Maximum 500 characters 0/500

Most relevant domain that goal area relates to?

Physical function

Cognitive function

Social support

General health

Personal health

Home and personal safety

Other

*** What are the client's current strengths and abilities in relation to this goal?**

Maximum 500 characters

- Once completed select **+ Save**.

Adding a goal

Maximum 500 characters 0/500

***What is the focus of the goal for the client?**

To regain a function (e.g. can be physical, cognitive or social)

To compensate for a declining function (e.g. can be physical, cognitive or social)

To receive care for a lost or declining function (e.g. can be physical, cognitive or social)

*** Motivation to achieve**

How important is it to the client to achieve this goal?
Scale of 1 (not that important) to 10 (extremely important)

1	2	3	4	5	6	7	8	9	10
---	---	---	---	---	---	---	---	---	----

Goal status

In Progress

Back

Delete

+ Save



- Recommendations can be added after the completion of the **Areas of Concern** and **Goals** in the **Other recommendations** section.

The screenshot shows the 'Other recommendations' section of a support plan for 'Ace Sharp'. The interface includes a top navigation bar with 'Client', 'Assessment', and 'Support Plan' tabs. A sidebar on the left lists various sections, with 'Other recommendations' highlighted in red. The main content area is titled 'Other recommendations' and includes a note: 'All fields marked with an asterisk (*) are required.' A red box highlights a '+ Add a recommendation' button. Below this, there is a 'General Recommendation' section with two entries: 'Develop Emergency Care Plan' and 'Obtain a smoke alarm'. Each entry shows 'No goals linked' and has icons for viewing and editing.

- The corresponding recommendations available for each assessment type will display for the client in the **Other Recommendations** section.
- Recommendations that cannot be added (generally due to other recommendations that have been added) will be indicated in italics.

Home Support assessment:

The screenshot shows the 'Recommendation' selection screen for a Home Support assessment. The title is 'Recommendation'. Below the title, it says 'Select a recommendation type'. There are five recommendation options, each with a 'Recommend' button and a right-pointing arrow: 'General Recommendation', 'Service Recommendation', 'Long Term Living Arrangement', 'Periods of Reablement', and 'Periods of Linking Support'.

Comprehensive assessment:

Recommendation

Select a recommendation type

General Recommendation Recommend →	Service Recommendation Recommend →
Care Type under the Act Recommend →	No Care Type under the Act Recommend →
Long Term Living Arrangement Recommend →	Periods of Linking Support Recommend →
Periods of Reablement Recommend →	

[Back](#)

10. Add any service recommendations or care types under the Act. Similar to the assessor portal, goals can be linked to some recommendations. Example screenshots are included below.

Adding a Service Recommendation

Fields marked with an * are mandatory

* **Service type**

Transport

Service Sub Types

Direct (driver is volunteer or worker) Indirect (through vouchers or subsidies)

* **Priority**

Low Medium High

Recommended service intensity

Hours per week

[Save](#) [Cancel](#)

! If a client is under the aged of 65, several additional entry fields will appear to document their exceptional circumstances.

- When finished, don't forget to select **Save** at the bottom of the recommendation page, before selecting **Save**.

! If it is determined that a client has a high priority for a Home Care Package, you are required to answer all mandatory questions and provide your reason or comments using the available comment field.

11. Once you have made all your recommendations, you will be able to view these in the **Other recommendations** section.

The **Other recommendations** section will display all recommendations made during the development of the Support Plan, where the **Client concerns and goals** will only display recommendations linked to goals.

17. Uploading assessment and support plan information to the assessor portal

! The device must be connected to the internet to upload an assessment.

17.1 Uploading assessment and support plan information for downloaded assessments

To upload assessment and support plan information for a client whose referral you have downloaded and assessment you have undertaken on the App, follow the steps below.

1. For the assessment you wish to upload, select **More options** from either the **Client**, **Assessment** or **Support Plan** sections, then select **Upload assessment** from the drop down that appears.

The screenshot shows the app interface for a client named Harry Boyer. At the top, there is a navigation bar with a back arrow, the client name, and several icons including a cloud, a question mark, a document, a 'Connected' status indicator, and a user profile icon labeled 'Comp Assessor'. Below this is a secondary navigation bar with three tabs: 'Client', 'Assessment', and 'Support Plan'. To the right of these tabs are three buttons: 'Upload' (highlighted with a red box), 'Quick notes', and 'More options'. The main content area is titled 'Other recommendations' and includes a note: 'All fields marked with an asterisk (*) are required.' There is a '+ Add a recommendation' button. The recommendations are categorized into 'General Recommendation', 'Service Recommendation', and 'Care Type under the Act'. Each recommendation has a text field, a 'Goals linked' status, and two icons (an eye and a pencil).

Category	Recommendation	Goals linked	View	Edit
General Recommendation	Obtain a smoke alarm	No goals linked	👁️	✎️
	Investigate getting a Personal Alarm	No goals linked	👁️	✎️
Service Recommendation	Transport Direct (driver is volunteer or worker)	Goals linked	👁️	✎️
Care Type under the Act	Residential Respite Care	No goals linked	👁️	✎️

! If not connected, the **Upload** button will not be available.

This screenshot shows the app interface in a 'Not connected' state. The top navigation bar is identical to the previous screenshot, but the status indicator now says 'Not connected' in a yellow box. The 'Upload' button in the secondary navigation bar is now disabled and greyed out, highlighted with a red box. The rest of the interface, including the 'Other recommendations' section, remains the same.

2. The **Upload Assessment** page will display. Address any incomplete sections if required by selecting **Cancel** and uploading again at a later time.

The screenshot shows the 'Upload assessment' page. At the top, there is a navigation bar with a back arrow, a help icon, a 'Connected' status indicator, and a user profile icon labeled 'Comp Assessor'. Below the title 'Upload assessment', there is a checkbox labeled 'This assessment was conducted in a remote setting' with a sub-note explaining remote assessments. A prominent yellow warning box with a triangle icon states 'Assessment is incomplete' and lists several missing sections: 'Participants consulted prior to the assessment', 'Mode of assessment', 'Assessment setting', 'Assessment information collected from', and 'Any additional details?'. Below the warning is a confirmation box asking 'Are you sure you would like to upload this assessment?' with a note that changes cannot be made after upload. At the bottom right, there are 'Cancel' and 'Upload' buttons.

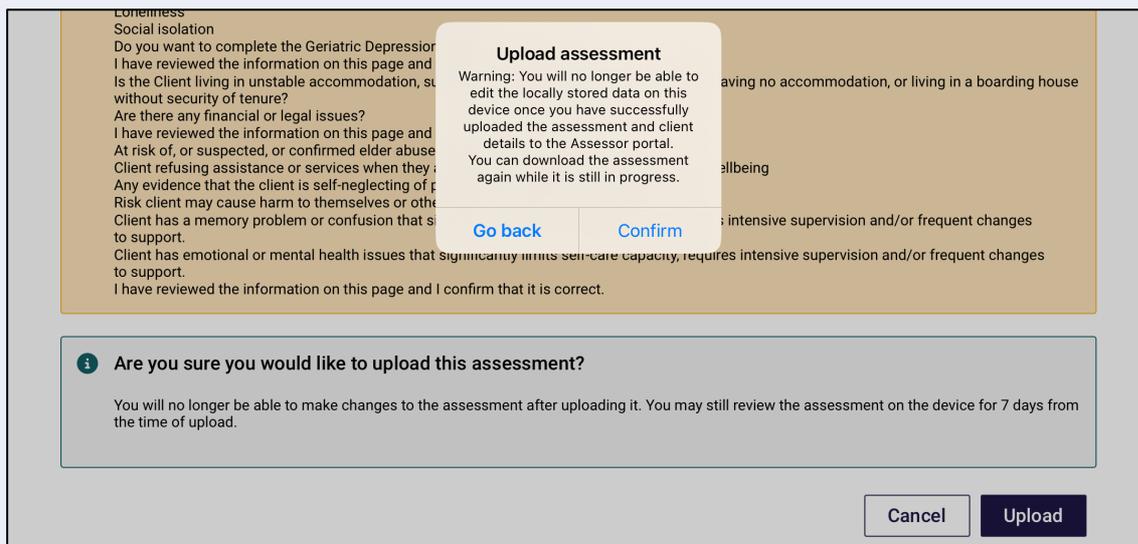
! Incomplete or invalid questions will not prevent you from uploading the assessment. However, you will need to complete all mandatory questions before you can complete the assessment in the assessor portal.

You will not be able to upload the assessment if the Assessment summary exceeds 5,000 characters.

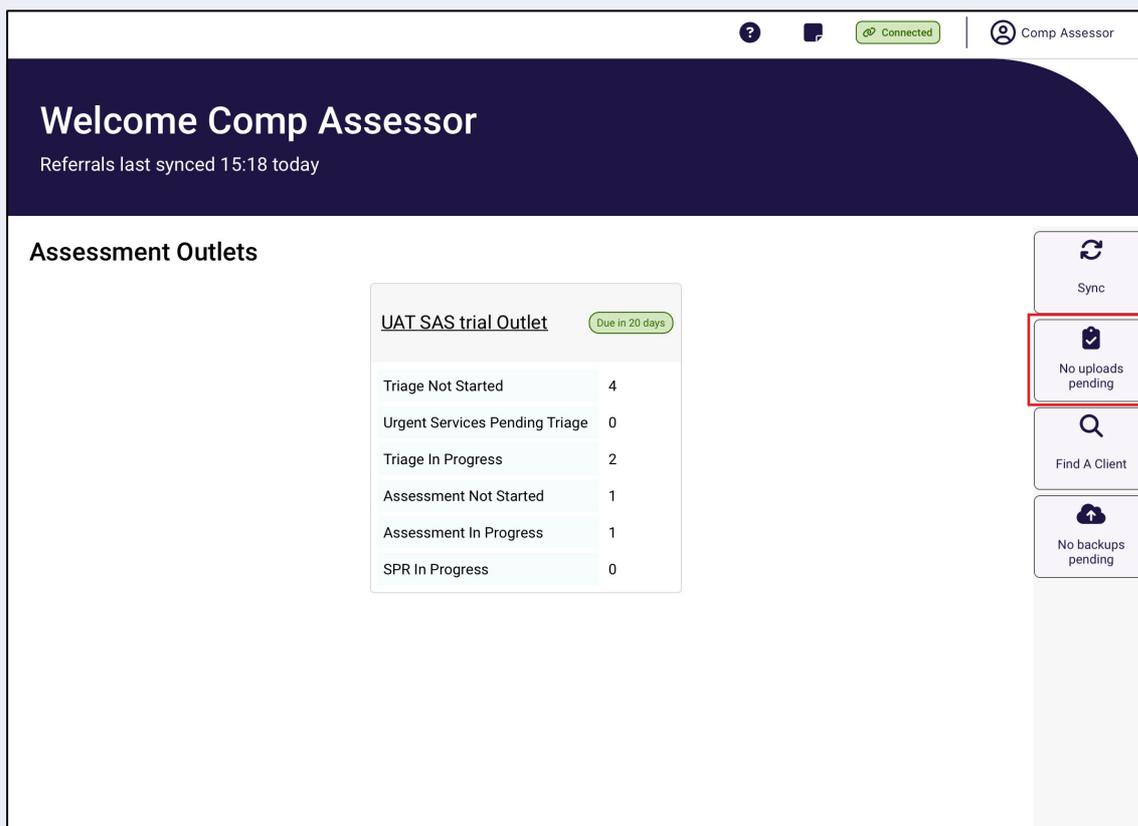
3. If your face-to-face assessment was conducted in a remote location, you should ensure that the **Remote Assessment** indicator is selected before the assessment is uploaded. To determine if an assessment is conducted in a remote location, please review the information provided within the help icon.

This screenshot shows the 'Upload assessment' page with the 'This assessment was conducted in a remote setting' checkbox highlighted by a red box. The checkbox is currently unchecked. The sub-note below it explains that a remote assessment is conducted in a remote or very remote area of Australia, defined by the Modified Monash Model (MMM).

4. Select **Upload**, and then select **Confirm** in the pop-up window.



5. The assessment will now be uploaded to the My Aged Care assessor portal. The information you added as part of the assessment will automatically populate the corresponding fields, where applicable, in the assessor portal and will display as **Pending Uploads** on the Dashboard in the App.



6. Once you have uploaded the client's information to the assessor portal, you can remove the client locally from your device. From now on, the client's referral and assessment is only viewable through the portal. The only way to interact with the client record using the App is to download the client's referral again.

17.2 Uploading assessments for offline clients

To upload assessment information for offline clients' assessments created on the App when not connected to the internet, the offline client will need to be registered locally or linked to an existing client record.

Following the client's registration, needs assessors can [self-refer clients for assessment](#) before uploading the assessment.

! If the client already has an in-progress assessment, you will not be able to upload the assessment. This should be confirmed prior to starting the assessment for an offline client.

For more information regarding this process please refer to the [My Aged Care – Assessor Portal User Guide 1 – Registering and referring clients](#).

17.3 Locally registering an offline client

If you do not have a referral assigned to you for an offline client saved locally to your device, you will need to register the client and arrange for a referral to be issued and assigned to you. This process can **only** be done when connected to the internet.

! If you have a referral assigned to you for the offline client you wish to upload to the assessor portal, follow the steps in [Linking offline clients and assessments](#).

Once the offline client has been registered and a referral has been assigned to you in the assessor portal you can link the offline client to the assessment referral and upload the assessment to the assessor portal.

Follow the steps below to locally register an Offline client.

1. Select the Offline client that you wish to register from your Dashboard.

The screenshot shows the 'Dashboard' of the Assessor Portal. At the top, there is a navigation bar with a back arrow, the title 'Dashboard', a help icon, a profile icon, and a status indicator 'Not connected'. Below the navigation bar, there is a filter section showing '5 assessments, sorted by Client Last Name'. The main content area displays a grid of client cards. Each card includes the client's name, a set of status buttons (Self referral, Triage not started, and a priority button), and a table with fields for Aged Care ID, Assessment type, and First Clinical. The client 'Harry Miller' is highlighted with a red border. To the right of the grid, there is a vertical sidebar with three buttons: 'Sync', 'New Assessment', and 'Backup Assessment'.

Client Name	Self referral	Triage not started	Priority	Aged Care ID	Assessment type	First Clinical
Jonas Abrego	Self referral	Triage not started	Medium priority		Comprehensive	19 days overdue
Harry Cleora	Self referral	Triage not started	High priority		Comprehensive	27 days overdue
Harry Miller	Self referral	Triage not started	Medium priority		Comprehensive	
Harry Nichols	Self referral	Triage not started	Low priority		Comprehensive	Due in 20 days
Harry Strong	Self referral	Triage not started	Low priority		Comprehensive	4 days overdue

2. Select **More options**, then **Register Client** at the pop up.

The screenshot shows the 'Client Profile' form for a client named Harry Miller. The form includes fields for Estimated Age (85), Gender (Male), Country of (Australia), Ethnicity (African), Does the client identify as an (No - Neither), and Preferred language (English). A red box highlights the 'More options' button in the top right corner. A pop-up menu is open over the 'Estimated Age' field, showing three options: 'Remove Client from Device', 'Register Client', and 'Add to Existing Client'. The 'Register Client' option is highlighted with a red box. A note at the top right of the form states: 'All fields marked with an asterisk (*) are required.'

3. The App will do a real-time check for any potential duplicates. Select **View Potential Matches** to view the possible matching client records.

If there are no matches, select **Register** and proceed to step 5.

! If there are any potential duplicate matches found, you will be required to view these records prior to registering the new client to avoid creating a duplicate client record in My Aged Care.

The screenshot shows a warning message box with a yellow background and a warning icon. The message reads: '2 potential duplicate matches were found'. A red box highlights the 'View Potential Matches' button. Below the message box, there is a 'Register' button.

The list of potential duplicate matches will be displayed on the left side of the screen in list view. Select each record to see a visual comparison of client details against the client record being registered.

< Register a client

Review potential duplicate client

Client details

→ Harry Miller	First name	Harry	Harry
→ Harry Miller	Middle name		
	Last name	Miller	Miller
	Date of Birth	01/07/1938	01/07/1938
	Home phone		
	Address	Level 1, 260 ELIZABETH Street SURRY HILLS NSW 2010	
	Mobile phone		(Not Applicable)
	Email		
	Medicare		
	DVA No		
	CRN		
	ACMPS		

Use new record Use existing record

If none of the potential duplicate matches are the client you are registering, select **Use new record** to complete the registration process: you will need to indicate client consent to register prior.

If you wish to use the matching record, select **Use existing record**.

- Where any client demographic information conflicts between the two records being merged, you must select which information to retain before saving.

The **Online record** is the record that already exists in My Aged Care, and **Captured offline** is the offline client saved locally to your device.

< Harry Miller ? Connected Comp Assessor

Resolve client record conflicts

* The below client information has been identified as conflicting between the two records you are merging. Please select the correct client information before saving. This information will be saved locally until the client is backed up to My Aged Care.

	Captured offline	Online record
Title	Mr	Dr
Gender	Male	Not Specified

Cancel Save client merge



! It is important to view any potential duplicate records prior to registering a new client to prevent the creation of duplicate client records in My Aged Care.

5. Once the offline client has been successfully registered or linked to an existing record, the client details page will display.

< Dashboard ?

Harry Miller's Details

- About
- Event Summary and Approvals
- Refer for Assessment

Personal Information

Born 1st July 1938

Communication requirements

No communication requirements provided

Identity documents (ID)

Medicare	
DVA	
CRN	
ACMPS	
SPARC ID	
Aged Care ID	AC52447042

Identity status

Not Attempted

Health Insurance

No health insurance provided

Address details

Home address:	12 FURZER Street PHII I IP
---------------	-------------------------------

To upload the client to the assessor portal, you will need to link the client to a referral, by either [self-referring clients for assessment](#) to automatically link the client's assessment information prior to uploading or facilitating a referral for assessment prior to [linking to the registered client](#).



17.4 Linking offline clients and assessments

Before uploading the assessment, you will need to link the offline client (locally registered or saved) to an existing client in My Aged Care.

1. In the Offline client's assessment, select **More Options**, then select **Add to Existing Client** at the pop up that appears.

The screenshot shows the 'Client Profile' form for Harry Miller. The form includes fields for Title (Mr), First name (Harry), Middle name, Last name (Miller), Date of Birth, Estimated Age (85), and a 'Remove Client from Device' button. A dropdown menu is open, showing options: 'Assessment options', 'Remove Client from Device', 'Register Client', and 'Add to Existing Client'. The 'Add to Existing Client' option is highlighted with a red box. The 'More options' button in the top right corner is also highlighted with a red box.

! Needs assessors can select [Self refer](#) if the reason for assessment is In-hospital, remote assessment, First Nations or Homeless or at risk of, and there is no existing referral for the client downloaded to their device.

For all other referrals, needs assessors are advised to call the My Aged Care service provider and assessor helpline on 1800 836 799.

2. You will be prompted to call 1800 836 799. Select **Yes** if you have:
 - Already contacted the My Aged Care contact centre, and had a referral sent to your organisation and assigned to you, or
 - Self-referred a client to your organisation.

! A person assigned the Team Leader role in the assessor portal will need to accept the referral and then a Triage Delegate can conduct triage or assign it to another Triage Delegate for triage. Once triage is completed and the assessment has been assigned to you then it will appear in your assessments queue in the assessor portal.

3. A list of existing clients that you can transfer the assessment information will appear. Select the name of the client, then select **Continue**.

Add to existing client

* Merge Harry Miller's Comprehensive Assessment information to:

Harry Boyer

Harry Jones

Harry Miller

This will remove Harry Miller's record from your device and transfer any answers from the assessment to the downloaded referral. Are you sure?

The assessment information collected about the offline client will now be transferred to the existing client, and the assessment can be uploaded to the My Aged Care assessor portal, following the process in [Uploading assessment and support plan information for downloaded assessments](#).

18. Conducting Support Plan Reviews

Needs assessors can use the App to:

- Conduct Support Plan Reviews for client's reviews they have downloaded.
- Conduct a Support Plan Review for a client they have previously assessed.

The steps to undertake a review on the App are as follows.

! To conduct a Support Plan Review (SPR), you must have the client assigned to you in the Assessor Portal before completing the SPR in the App.

18.1 Downloading a Support Plan Review

1. Open the App and navigate to the main dashboard. Search for the client using filters or sort function.

If all clients' details are synchronised and downloaded from the Assessor portal, go to [Completing a support plan review](#).

2. If the client's details are yet to be downloaded from the Assessor Portal, there will be a **Download** icon at the client card. Click on the client card to download the Support Plan Review.

Dashboard

Filters 2 assessments, sorted by Client Last Name

<p>Brook Resp</p> <p>SPR in progress Low priority</p> <p>PALMERSTON, ACT, 2913</p> <p>Aged Care ID AC17337023</p> <p>Assessment type Support</p> <p>Review Type Ad-hoc</p>	<p>Club RespY ↓</p> <p>SPR in progress Low priority</p> <p>Aged Care ID</p> <p>Assessment type Support</p> <p>Review Type Ad-hoc</p>	<p>Sync</p> <p>New Assessment</p> <p>Backup Assessment</p>
---	---	--



3. The client tile will show the download in progress.

Step	Progression
<input checked="" type="checkbox"/> Download Client Details	Downloaded
<input checked="" type="checkbox"/> Download Client Notes	Downloading
<input type="checkbox"/> Download Client Approvals	Ready for download
<input type="checkbox"/> Download Last Completed Review	Ready for download
<input type="checkbox"/> Download Support Plan	Ready for download

4 sync steps remaining

Close

This is the page that shows the download progress of the Support Plan in detail. Select **Close** to return to the Dashboard.

4. Once downloading is finished, you will be able to click **Open assessment** to continue or return to the dashboard.

Step	Progression
<input checked="" type="checkbox"/> Download Client Details	Downloaded
<input checked="" type="checkbox"/> Download Client Notes	Downloaded
<input checked="" type="checkbox"/> Download Client Approvals	Downloaded
<input checked="" type="checkbox"/> Download Last Completed Review	Downloaded
<input checked="" type="checkbox"/> Download Support Plan	Downloaded

+ Open assessment

Close



18.2 Completing a Support Plan Review

1. Click on the client's support plan review card.

The dashboard shows a grid of client assessment cards. The 'Brook Resp' card is highlighted with a red border. The cards display client names, status tags, and key information like Aged Care ID, assessment type, and clinical due dates.

Client Name	Status	Priority	Address	Aged Care ID	Assessment Type	First Clinical
Harry Goff	Self referral	Triage in progress	PHILLIP, ACT, 2606	AC86084068	Comprehensive	8 days overdue
Harry Jones	Self referral	Medium priority		AC36272003	Comprehensive	19 days overdue
Harry Miller	Self referral	Assessment in progress	ALICE SPRINGS, NT, 0870	AC39066840	Comprehensive	4 days overdue
Harry Nichols	Self referral	Triage not started			Comprehensive	Due in 20 days
Brook Resp	SPR in progress	Low priority	PALMERSTON, ACT, 2913	AC17337023	Support	
Club RespY	SPR in progress	Low priority	PALMERSTON, ACT, 2913	AC39712609	Support	

2. The Support Plan **Review** page will display.

The screenshot shows the 'Brook Resp' Support Plan Review page. The 'Support Plan' tab is highlighted with a red border. The page displays an 'Assessment Summary' section with a large text area for notes and a 'Flag as draft' toggle.

Assessment Summary

All fields marked with an asterisk (*) are required

Flag as draft

0/5000

Edit

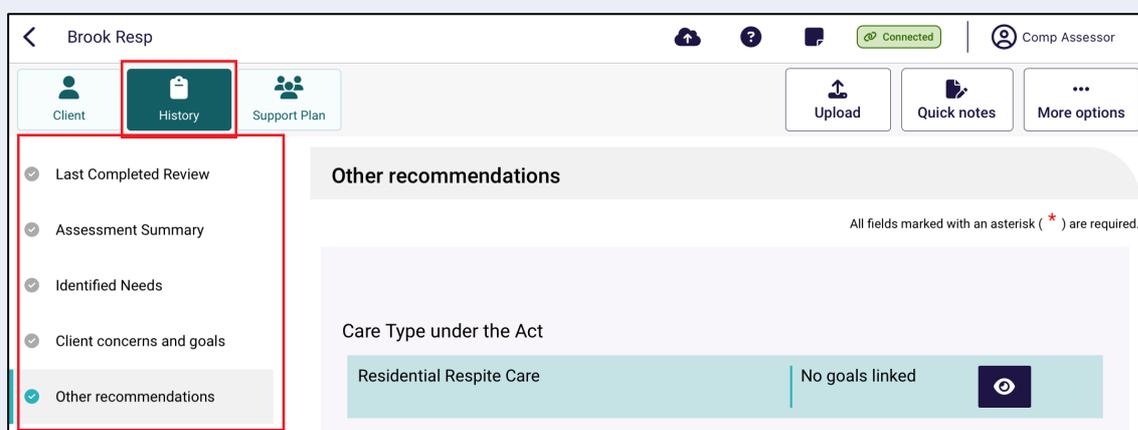
3. Before starting the review, you can view the client's support plan and review history by navigating to the **History** page.

In the **History** page, you can see details of the client's **Last Completed Review**. The support plan review request and outcome details will be displayed only if the client has previously had a review completed.

You can also start the review from the **History** page.

You can also view the client's:

- Last Completed Review
 - Assessment summary
 - Identified needs
 - Client concerns and goals
 - Other recommendations
4. As well as viewing this information, you can schedule a future support plan review in the **Support Plan** tab.



5. Navigate to each of the pages in the support plan to start the review. Once selected, the review will load which will allow you to edit the client's support plan.

! Needs assessors can add general and service recommendations Long-Term Living arrangement and Periods of Reablement and Linking Support.

6. Once the review is complete and all sections have been updated, you can upload the review, similar to [uploading assessments and support plan information](#).

19. Completing the match and refer process and finalising the assessment or completing the review.

To complete the support plan and Support Plan Review, see the [My Aged Care – Assessor Portal User Guide 7 – Completing a support plan and support plan review](#)

Or to complete the match and refer process and finalise the assessment, see the [My Aged Care – Assessor Portal User Guide 8 – Referring for services](#)

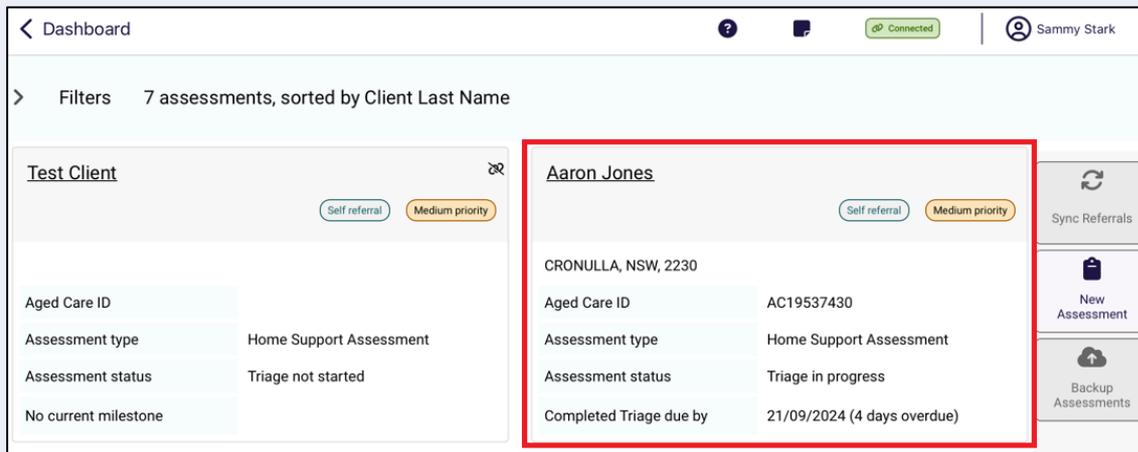
! If you have undertaken an assessment using the App, you will need to contact the client to develop the client's support plan, confirm their referral preferences and obtain their consent to send referrals for service.

20. Removing assessments and reviews from the device

You may choose to remove client details from your device to increase storage space and allow for easier navigation from the App Dashboard. To manually remove client details from the device, follow the steps below.

! Removing a client record from the device will permanently delete any assessment or review information recorded on that device and that has not been uploaded to the assessor portal.

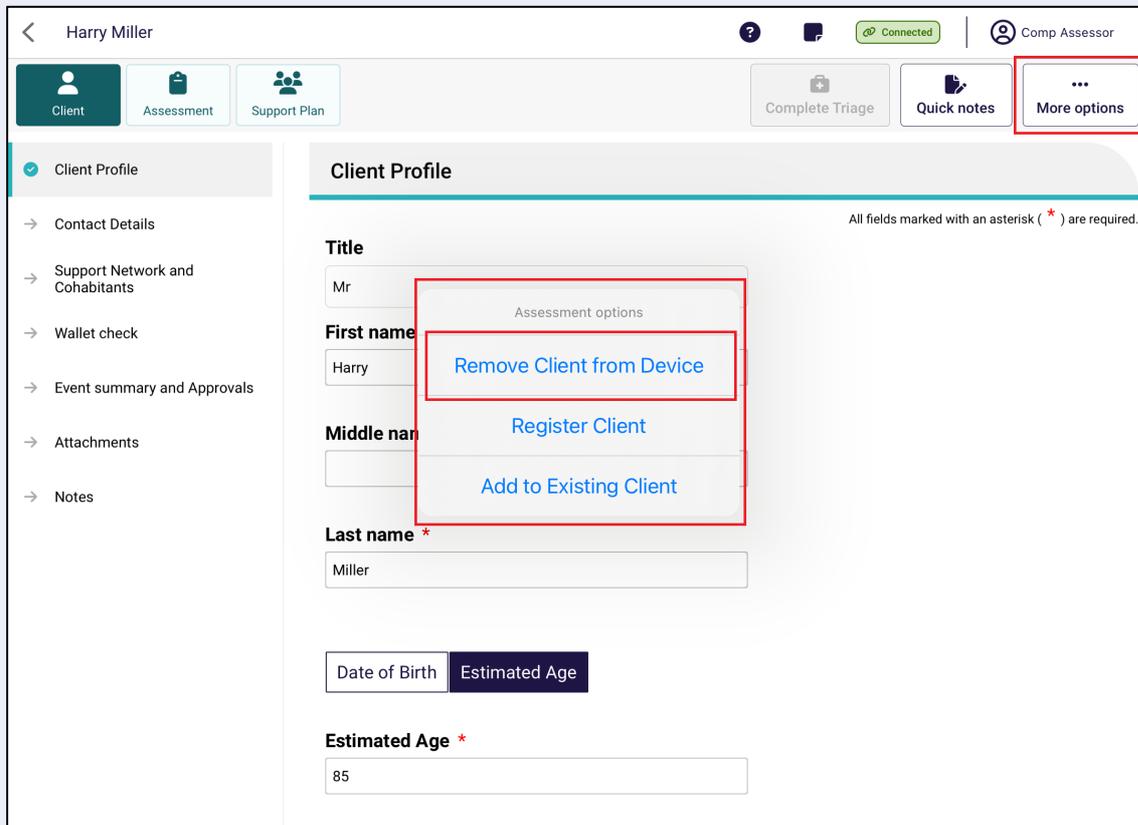
1. Open the App. The dashboard page will be displayed, select your outlet that contains the clients assessment. Once in the outlet, search and click on the client card.



The screenshot shows the app dashboard with a filter for '7 assessments, sorted by Client Last Name'. A client card for 'Aaron Jones' is highlighted with a red box. The card displays 'Self referral' and 'Medium priority' buttons, and a table with the following information:

CRONULLA, NSW, 2230	
Aged Care ID	AC19537430
Assessment type	Home Support Assessment
Assessment status	Triage in progress
Completed Triage due by	21/09/2024 (4 days overdue)

2. From any page in the client's record, you can remove the record from the device by selecting **More options** and then **Remove Client from Device** from the pop up.

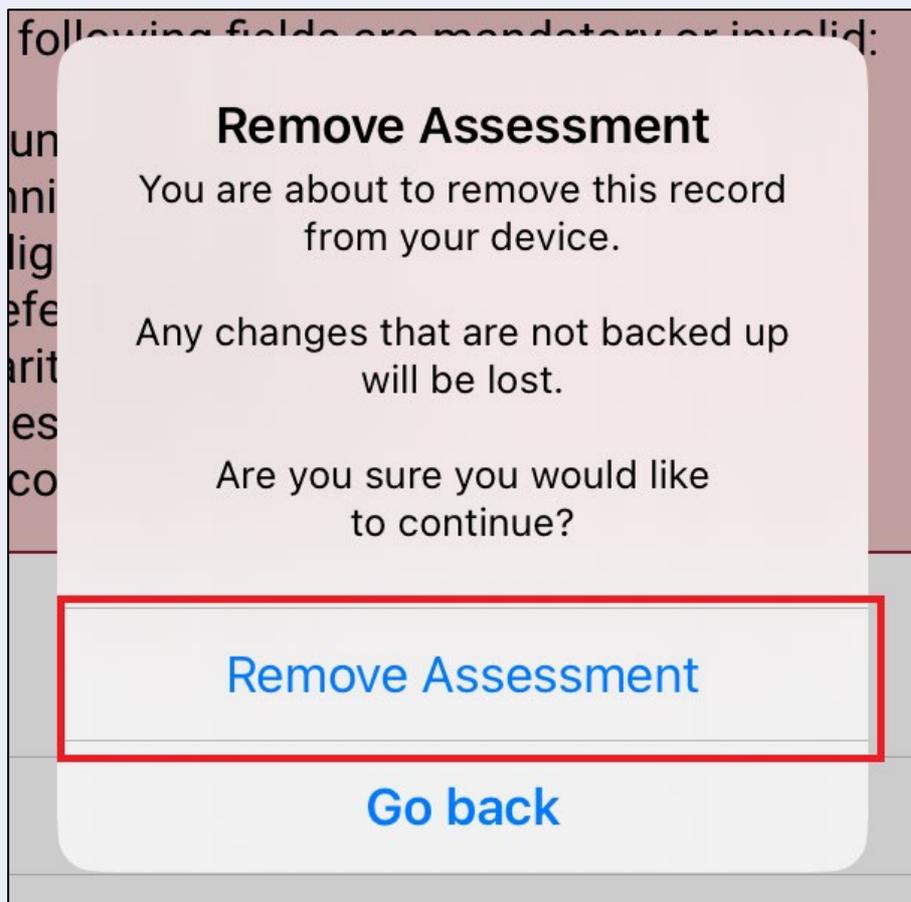


The screenshot shows the client profile page for 'Harry Miller'. The 'More options' button is highlighted with a red box. A pop-up menu is displayed over the 'First name' field, containing the following options:

- Remove Client from Device
- Register Client
- Add to Existing Client



3. Select **Remove Assessment** to remove the record.



! Clients with uploaded assessments will still appear in the app when you select **Refresh** until you complete the client's support plan in the assessor portal.

21. Completing a Residential Respite Classification Assessment

! Unlike Support Plan Reviews and Comprehensive assessments, Residential Respite Assessments can only be completed from the App. If you are using a PC or Laptop to complete the assessment, a [Windows compatible \(sideloaded\) version](#) of the App is available.

Residential Respite Assessments are an assessment of the care recipient's mobility utilising the DEMMI-modified. Respite Classifications are used to determine the level of subsidy Residential Service Facilities will receive for the care of Respite clients under the AN-ACC funding model.

There are 12 tasks in DEMMI-modified, select one rating only for each of the twelve tasks that best matches the resident's capabilities.

Detailed description of the assessment tool

The DEMMI-modified is an instrument that measures the mobility of older people across clinical settings. It is preferably based on direct observation of the resident. However, it is not appropriate to ask a resident to complete tasks if there is a falls risk or risk of causing distress to the resident.

The clinical needs assessor should use their clinical judgement to evaluate if the DEMMI-modified can be undertaken and at what point the assessment should cease.

The four DEMMI domains are:

- bed mobility
- chair
- static balance (no gait aid)
- walking.

Only clinical needs assessors who have completed training in DEMMI-modified based respite assessments under the AN-ACC funding model can assess clients using the DEMMI-modified.

For information on the DEMMI–modified tool, refer to the [AN-ACC Reference Manual](#).

To complete the DEMMI–modified in the App first an assessment must be downloaded to the App. Refer to [Self-Refer a Care Recipient for a Residential Respite Assessment](#) or [Complete an assigned Residential Respite Assessment Referral](#) for guidance.

Clinical needs assessors can use the App to:

- Conduct a Residential Respite Classification Assessment they have downloaded.
- Self-refer Residential Respite Classification Assessments.
- Reject Residential Respite Classification Assessments.

21.1 Refer for a Residential Respite Assessment

! Unlike Support Plan Reviews and Comprehensive assessments, Residential Respite Assessments can only be completed from the App. If you are using a PC or Laptop to complete the assessment, a [Windows compatible \(sideloaded\) version](#) of the App is available.

1. Open and log in to the App. Select **Find A Client** from the dashboard. You can follow the steps set out in section [9.1 Finding a client](#).

Welcome Comp Assessor
Referrals last synced 11:44 today

Assessment Outlets

UAT SAS trial Outlet Due in 19 days

Triage Not Started	2
Urgent Services Pending Triage	0
Triage In Progress	2
Assessment Not Started	0
Assessment In Progress	1
SPR In Progress	2

Facilities (AN-ACC)

In home respite

Sync
No uploads pending
Find A Client
No backups pending



2. Search and open the client's record.

Once you are in the client's record, confirm that the personal details are correct. Then, select **Event Summary and Approvals** and ensure that the client has a current Residential respite care approval.

The screenshot shows the 'Barry Bartels's Details' page. On the left sidebar, the 'Event Summary and Approvals' tab is highlighted with a red box. The main content area is divided into sections: 'Triage History' (Triage Completed on 06 June 2024 12:28 pm by Comp Assessor from UAT SAS trial Outlet. Outcome: Comprehensive (clinical) assessment required), 'Other recommendations' (Residential Respite Care (Low priority)), and 'Current care approvals'. Under 'Current care approvals', there are three entries: 'Home Care Package Level 1' (Approval start date 3 March 2020), 'Residential Permanent' (Approval start date 3 March 2020), and 'Residential Respite Low Care' (Approval start date 3 March 2020). A red box highlights the 'Residential Respite Care' entry with an approval start date of 6 June 2024.

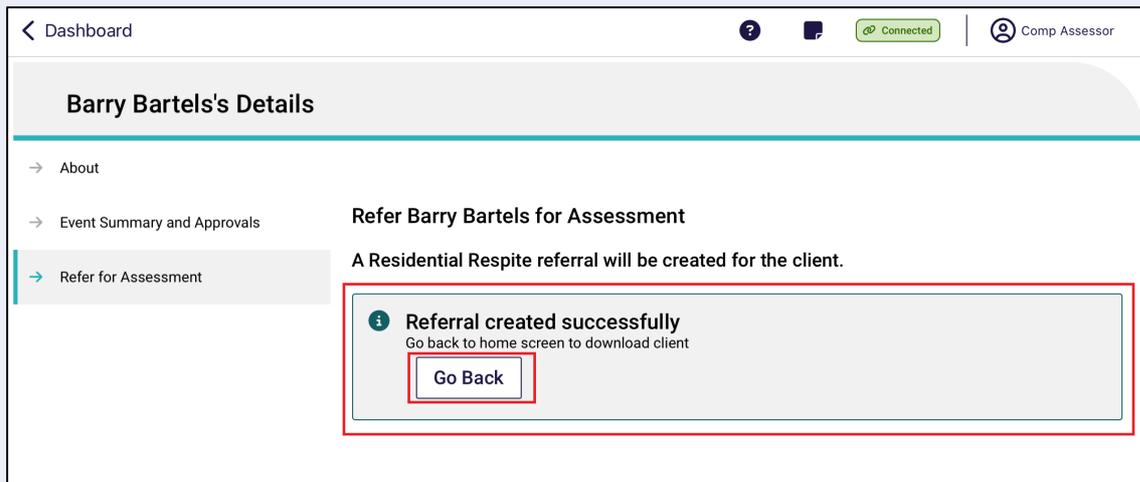
3. Go to the Refer for Assessment tab, and select the type **Residential Respite Assessment**.

Input an Assessment date, ensure the assessment date is the date that you conducted the assessment. The Assessment date may impact the effective date of the classification that is generated and subsidy paid to the provider.

Confirm the correct Assessment Setting is selected and once the details are correct and click **Create Referral**.

The screenshot shows the 'Barry Bartels's Details' page with the 'Refer for Assessment' tab selected, highlighted with a red box. The form title is 'Refer Barry Bartels for Assessment'. Below the title, it states 'A Residential Respite referral will be created for the client.' The form includes several fields: 'Select an outlet for referral' (UAT SAS trial Outlet), 'Select an assessment type: *' (Residential Respite Assessment, highlighted with a red box), 'Assessment date *' (06/06/2024), 'Assessment Setting: *' (Non-Hospital), and 'Reason for self referring:' (Change in Respite Care needs). A 'Create Referral' button is located at the bottom right, highlighted with a red box.

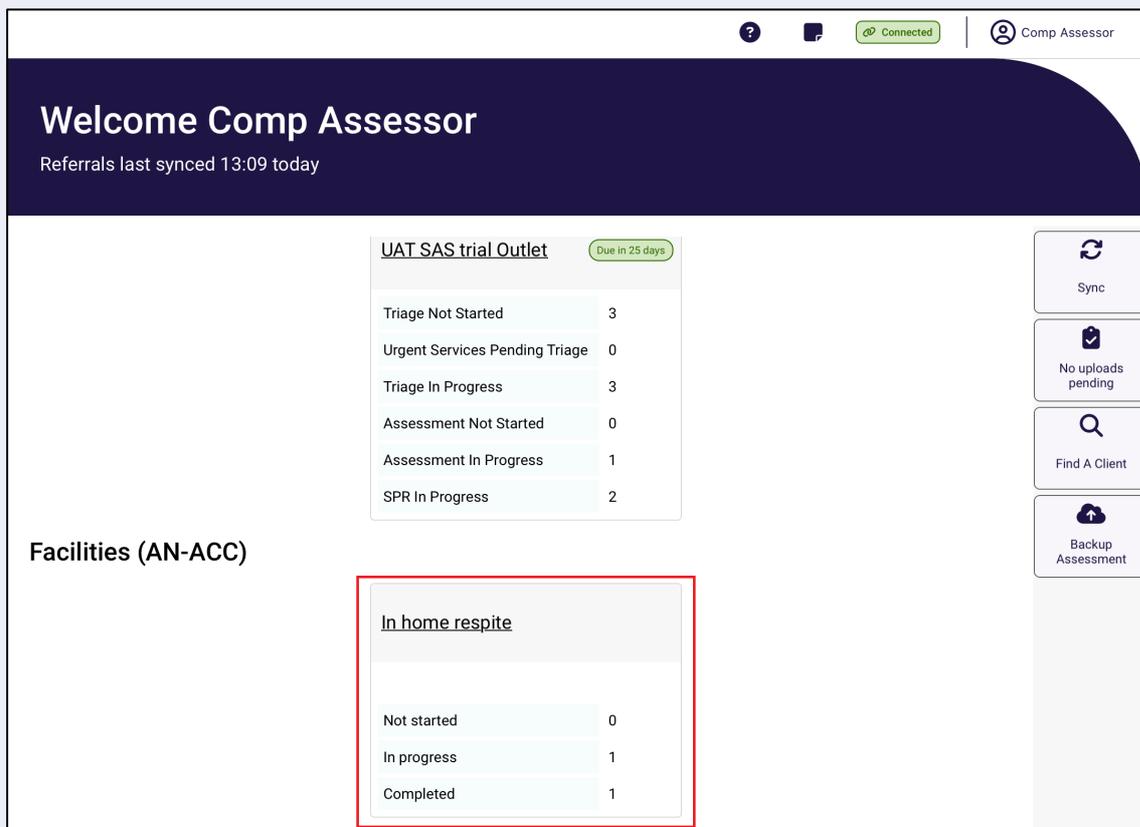
You will see a confirmation screen confirming that the referral was created successfully. Click the **Go Back** button to return to the Dashboard to the downloaded client that you have self-referred.



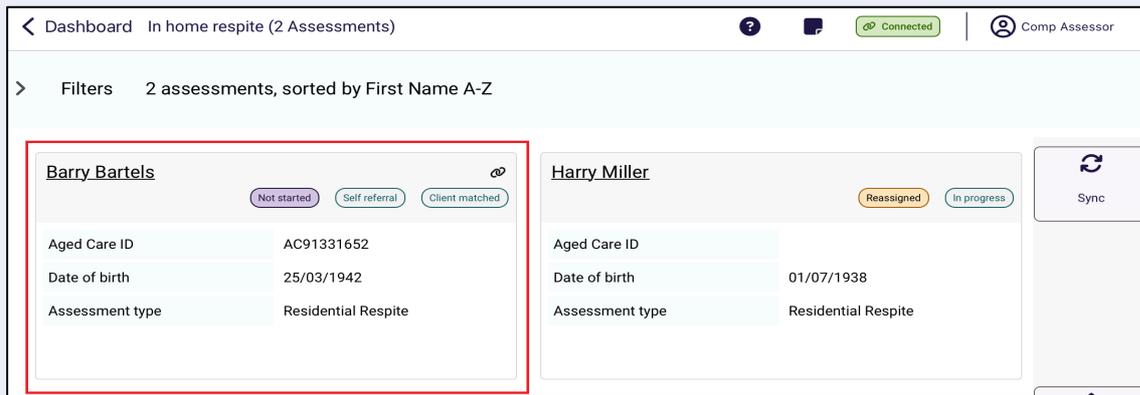
Refer to the next section on how to complete an assigned Residential Respite Assessment Referral for how to complete the DEMMI-modified.

21.3 How to start an assigned Residential Respite Assessment Referral.

Residential Respite Assessments that have been assigned to you by your Team Leader will automatically appear on your App. To access your assigned Residential Respite Assessments, navigate to the Dashboard and click on your outlet.



To complete the assessment, click on the client's card to download the assessment to your device.



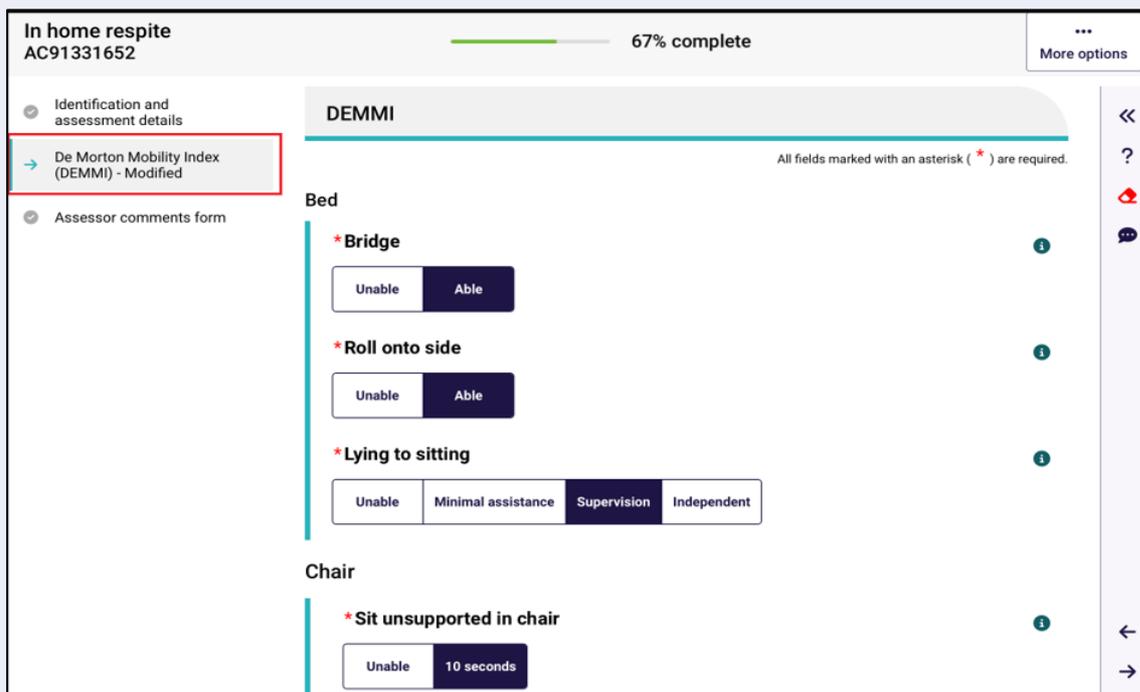
Select **Start Assessment**.



21.4 Completing a Residential Respite Assessment

1. Confirm the client details are correct by reviewing the **Identification and assessment details** section.
2. Select the **De Morton Mobility Index (DEMMI) – Modified** tab to complete the Modified DEMMI Assessment.

Select the question mark to display tool help. This will provide guidance on how to complete the assessment. Complete all mandatory fields until the page has a tick next to it.



3. Tool tips are available by selecting the information icon in the top right-hand corner of each question.

The screenshot shows the 'DEMMI' assessment interface. On the left, there is a sidebar with three items: 'Identification and assessment details', 'De Morton Mobility Index (DEMMI) - Modified', and 'Assessor comments form'. The main content area is titled 'DEMMI' and includes a note: 'All fields marked with an asterisk (*) are required.' Below this, the 'Bed' section contains three questions:

- *Bridge**: A text input field with the description 'Person is lying supine and is asked to bend their knees and lift their bottom clear of the bed'. Below the field are two buttons: 'Unable' and 'Able'. An information icon is in the top right corner.
- *Roll onto side**: Two buttons: 'Unable' and 'Able'. An information icon is in the top right corner.
- *Lying to sitting**: Four buttons: 'Unable', 'Minimal assistance', 'Supervision', and 'Independent'. An information icon is in the top right corner.

Below the 'Bed' section is the 'Chair' section with one question: ***Sit unsupported in chair**, which also has an information icon in the top right corner.

4. Once the assessment is complete you may add comments, these comments will be stored with the assessment and can be viewed by the department if needed.

The screenshot shows the 'Comments' section of the assessment interface. At the top, it says 'In home respite AC91331652' and '100% complete'. There are 'Complete' and 'More options' buttons. The sidebar on the left has three items: 'Identification and assessment details', 'De Morton Mobility Index (DEMMI) - Modified', and 'Assessor comments form', which is highlighted with a red box. The main content area is titled 'Comments' and includes the note: 'All fields marked with an asterisk (*) are required.' Below this, there is a text input field with the prompt: 'Please add any comments you have in relation to this assessment below:'. Below the field is a 'Test example of assessor notes.' and a character count '31/4000'.



5. Once the assessment is complete click the **Complete** button.

In home respite
AC91331652

100% complete

Complete

More options

Identification and assessment details

De Morton Mobility Index (DEMMI) - Modified

Assessor comments form

Comments

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

Please add any comments you have in relation to this assessment below:

Test example of assessor notes.

31/4000

6. Select **Complete Assessment** at the next screen. This will submit the assessment and generate a classification for the client, there is no further action required.

Complete Assessment

You are about to complete this assessment

Once completed you cannot edit the assessment, however you will be able to review it and upload it.

You can Reopen the assessment to edit it by 'Reopening' it before uploading.

Complete Assessment

7. Following this you will be re-directed to the Upload Assessment page. Select **Upload**.

Upload Assessment

Assessment Summary: Residential Respite

Name: Aayden Johnson

Date of Birth: 5 February 1940

Gender: Female

Date of Assessment: 26 September 2024

PPE supplied and used

Is the Client receiving care in a Memory Support Unit?

DEMMI

Bed

Bridge: Unable

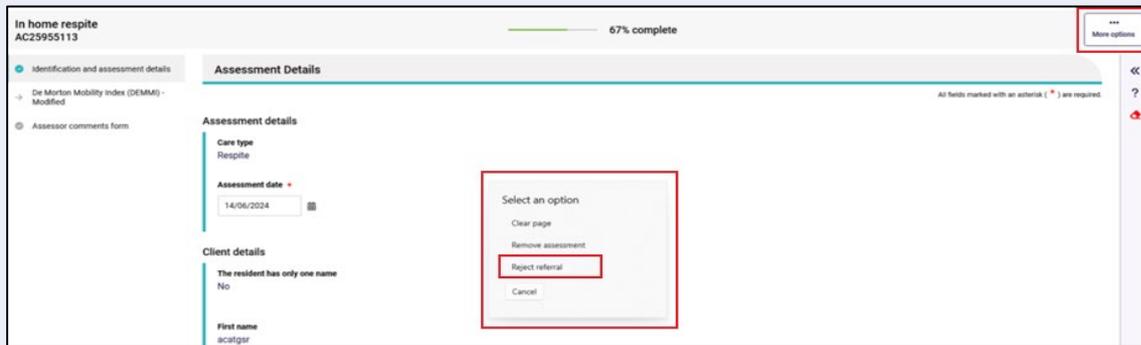
Upload



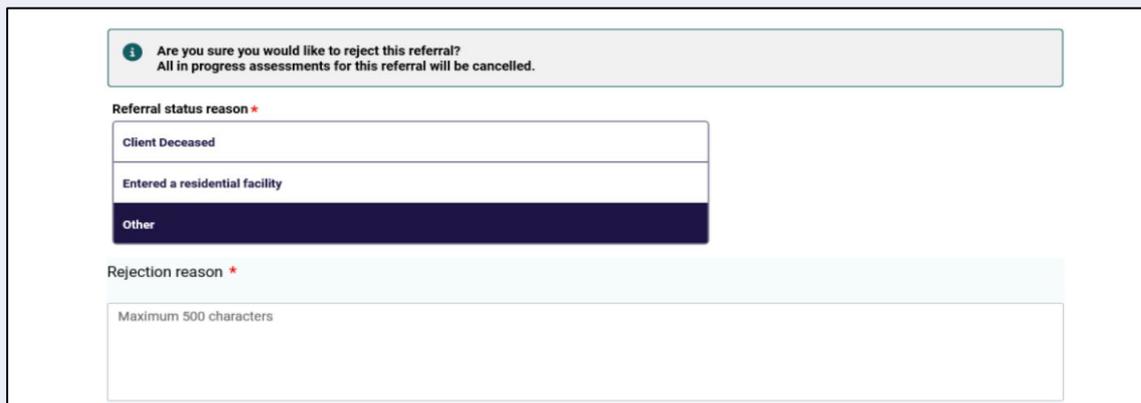
21.5 Rejecting a Residential Respite Assessment

If a Team Leader assigns a residential respite assessment to you, you can choose to reject it.

1. Open and log in to the App, [download and open an assessment](#). Select actions in the top right corner, then select **Reject Referral** from the pop up.



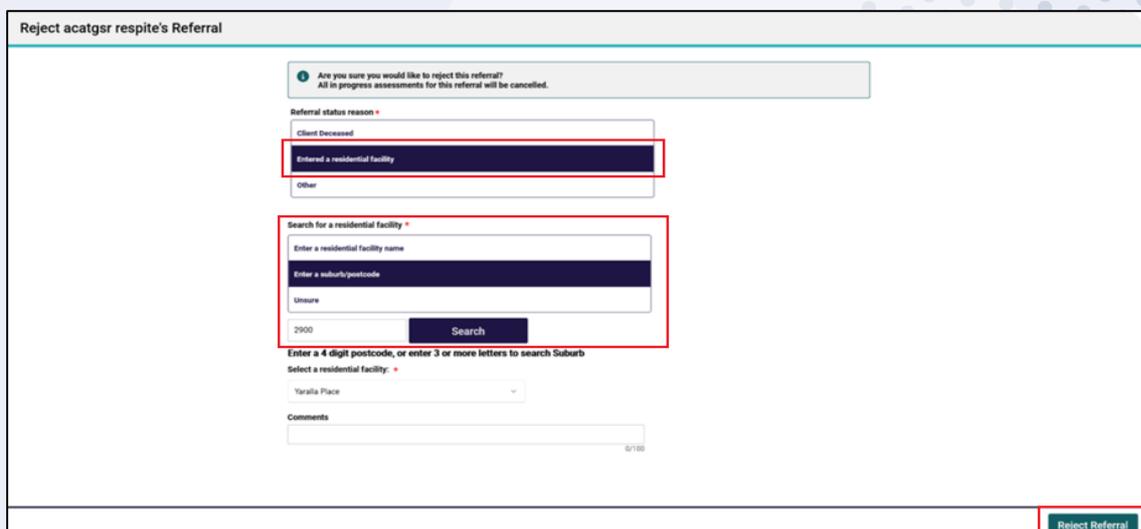
2. Select the appropriate rejection reason, this may be either **Client Deceased**, **Entered a residential facility** (Figure 1) or **Other** (below). Please note, for the reason **Client Deceased** please contact your team lead or the My Aged Care contact centre to complete the process.



3. If the client has entered a residential service facility, please select **Entered a residential facility**. These referrals will now be assigned to an appropriate RFA Organisation.

The options provided are either searching by residential facility name or suburb/ postcode; Or if you are unsure, please select **Unsure** and a departmental officer will be assigned the referral manually.

Figure 1 - "Entered a residential facility"



4. Once all the criteria have been entered select **Reject Referral**. The referral will now be rejected, there is no further action needed.
5. Residential Respite Assessments for clients who have entered a residential facility are to be completed by Residential Funding Assessors. If a client has entered a Residential Facility, reject the referral due to Entered a residential facility by completing the following steps:
 - a. Select Entered a residential facility.
 - b. Either enter a residential facility name, enter a suburb/ postcode or if you are unsure select Unsure.
 - c. Select Search.
 - d. Scroll down until the applicable Residential Facility has been highlighted and select done.

! You can upload an assessment to the My Aged Care assessor portal from the App without answering all mandatory questions. However, you will need to complete all mandatory questions before you can complete the assessment in the My Aged Care assessor portal.

Clinical needs assessors are expected to contact the client to confirm the outcome of the assessment, discuss the client's service preferences, and obtain consent to send referrals for service.

Part C - Residential aged care funding assessments (RAC funding assessors)

22. Conducting an RAC funding assessment

! Please note that 'assessment' in part C refers to residential aged care funding assessments completed by residential aged care funding assessors who complete assessments using the Australian National Aged Care Classification (AN-ACC) assessment tool.

22.1 Find a client

1. On the **Facilities** page, all assessment referral/s that have been assigned to you will be listed. Scroll up and down to view more facilities and clients.

Select a facility to display all referrals for that Facility that are assigned to you.

The screenshot shows the 'Facilities (AN-ACC)' page in the My Aged Care app. At the top, it says 'Welcome Unrestricted 1 UAT' and 'Referrals last synced 13:39 today'. Below this, there are two facility cards:

Facility Name	Address	Not started	In progress	Completed
Edge Hill Orchards	15 OREGON Street MANOORA QLD	1	0	0
Gosling Creek Aged Care	1501-1503 Forest Road ORANGE NSW	4	0	0

On the right side of the screen, there are four action buttons: 'Sync', 'No uploads pending', 'Quality Assurance', and 'No backups pending'.



- Once you have clicked on the facility you are wanting to assess in, the resident referrals for this facility will be displayed. Scroll up and down the page to locate the resident you wish to assess or use sort and filter options to narrow the number of residents being displayed.

! If you are not connected to the internet, only referrals that have been previously downloaded will be available. It is recommended that you sync your device daily before commencing.

Dashboard UAT Pitz RESI- HCP & STRC outlet (7 Assessments) Connected | Unrestricted 1 UAT

Filters 7 assessments, sorted by First Name A-Z

Resident Name	Status	Aged Care ID	Date of birth	Assessment type
AGAntwon UATHayes	237 days overdue (Not started)	AC23765274	09/11/1940	Residential Permanent
AGLeonard UATLinnie	237 days overdue (Not started)	AC08129645	08/12/1940	Residential Permanent
AGNorval UATKoelpin	237 days overdue (Not started)	AC83537217	18/09/1940	Residential Permanent
AGZiemann UATFrieda	237 days overdue (Not started)	AC35942036	03/03/1941	Residential Permanent

Sync, New Assessment, Quality Assurance Assessment, No uploads pending, No backups pending

There are four ways to filter or order referrals:

- Filtering on keyword for example First Name, Last Name or Aged Care ID,
- Filtering on the Status (Assessment status),
- Filtering Assessment type,
- Order on First Name or Last name in ascending or descending alphabetical order, and
- Sorting on due or departure date in ascending or descending order.

Dashboard UAT Pitz RESI- HCP & STRC outlet (7 Assessments) Connected | Unrestricted 1 UAT

Filters 7 assessments, sorted by First Name A-Z

Keyword

Q Keyword filter

Order: First Name A-Z | Status: Select a status | Assessment type: Select an assess...

× Clear filters

Resident Name	Status	Aged Care ID	Date of birth	Assessment type
AGAntwon UATHayes	237 days overdue (Not started)	AC23765274	09/11/1940	Residential Permanent
AGLeonard UATLinnie	237 days overdue (Not started)	AC08129645	08/12/1940	Residential Permanent

Sync, New Assessment, Quality Assurance Assessment



Select the Filter dropdown to expand the filter menu. It displays the Sort By option and Filter options. The Filter option text box is an active search. It will refine results when typed.

In the following example, the residents are sorted by Last name in ascending alphabetical order, and any residents' names that contains "Ra" will appear.

Dashboard UAT Pitz RESI- HCP & STRC outlet (7 Assessments) Connected Unrestricted 1 UAT

Filters Filters applied 1 assessment, sorted by Last Name A-Z, filtered by 'Ra'

Keyword

Q Ra Cancel

Order Status Assessment type

Last Name A-Z Select a status Select an assess...

Clear filters

Ram Chandra

115 days overdue Not started Reassessment

Aged Care ID AC03906039

Date of birth 03/05/1976

Assessment type Residential Respite

Sync

New Assessment

Quality Assurance Assessment

3. Select the resident's record.

Depending on the resident's assessment status, selecting the record will either start the assessment, or will be directed to the first page of the assessment in progress.

Start of an assessment

Nia Sharma

You are about to start an assessment for Nia Sharma (AC67952275, 03 Feb 1967, Female).

This will put the assessment in-progress.

Start Assessment Reject Referral

Is a quality assurance or training assessment also being conducted?

QUALITY ASSURANCE TRAINING

Assessment in progress

Nia Sharma
Connected
Unrestricted 1 UAT

UAT Pitz RESI- HCP & STRC outlet
AC67952275

18% complete

More options

- ✓ Identification and assessment details
- Palliative Care
- Nursing
- Resource Utilisation Group - Activities of Daily Living
- Australia-modified Karnofsky Performance Status
- Frailty
- Braden Scale
- De Morton Mobility Index (DEMMI) - Modified
- Australian Modified - Functional Independence Measure
- Behaviour Resource Utilisation Assessment
- Assessor comments form

Assessment Details

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

Assessment details

Care type
Permanent

Assessment date *
30/05/2024

***Was PPE supplied by your organisation used?**

Yes
 No

***Is the Client receiving care in a Memory Support Unit?**

Yes
 No

Client details

The resident has only one name
No

<<
?
🔴

←
→

22.2 Self-Referral

! Prior to conducting a self-referral, RAC funding assessors should contact the Department.

RAC funding assessors can self-refer the assessment when they identify a resident in a service or facility that does not have an assessment referral. This could happen if the resident has entered care since the time of the assessment referral being issued.

1. Select **New Assessment** on the right-hand side in the facility dashboard menu.

Dashboard UAT Pitz RESI- HCP & STRC outlet (7 Assessments)
Connected
Unrestricted 1 UAT

Filters 7 assessments, sorted by First Name A-Z

AGAntwon UATHayes 237 days overdue Not started

Aged Care ID	AC23765274
Date of birth	09/11/1940
Assessment type	Residential Permanent

AGLeonard UATLinnie 237 days overdue Not started

Aged Care ID	AC08129645
Date of birth	08/12/1940
Assessment type	Residential Permanent

AGNorval UATKoelpin 237 days overdue Not started

Aged Care ID	AC83537217
Date of birth	18/09/1940

AGZiemann UATFrieda 237 days overdue Not started

Aged Care ID	AC35942036
Date of birth	02/02/1941

↻
Sync

📁
New Assessment

✓
Quality Assurance Assessment

⬆️
No uploads pending

⬆️
No backups pending

2. The **New assessment** screen appears. Enter the resident's My Aged Care client identifier (AC ID) and select **Search**. The service provider will be able to provide the AC ID for the resident.

UAT Pitz RESI- HCP & STRC outlet (7 Assessments) New assessment

New Assessment

Enter the client's My Aged Care identifier to search for their client record

AC53206991

Search

10/10

3. Check the details of the search result. If the details are correct, select the record to start the assessment.

UAT Pitz RESI- HCP & STRC outlet (7 Assessments) New assessment

New Assessment

Enter the client's My Aged Care identifier to search for their client record

AC53206991

Search

10/10

i The following client record matches the client identifier that you entered.
If the details provided below match the personal details of the client, click on the client record card below to commence their assessment.
Otherwise, correct the client identifier and search again.

Daniella Romine
Date of Birth: 5 March 1941
AC53206991
Gender: Female

4. If required, fill in any mandatory fields in the **Add Client** page, by selecting the appropriate options. Mandatory fields are shown by a red line over the field name and a red asterisk.

New assessment Add client

Care Type* **Permanent** Respite

Self-Referral Reason* **New Permanent Resident** Respite Resident

Assessment Date 30/05/2024 ?

Aged Care ID* AC53206991

5. Once all mandatory fields are complete, select **Start Assessment**.



< New assessment Add client

Care Type * Permanent Respite

Self-Referral Reason * New Permanent Resident Respite Resident

Assessment Date ?

Aged Care ID * 10/10

The resident has only one name

First Name * 8/50

Last Name * 6/50

Date of Birth ?

Gender * Female

Start Assessment

6. The client record will now appear in the main menu under the status of **In-progress**. You can use the filter function to highlight all the assessments with this status.

< Dashboard UAT Pitz RESI- HCP & STRC outlet (6 Assessments) Connected | Unrestricted 1 UAT

Filters 2 assessments, sorted by First Name A-Z

Keyword

Order First Name A-Z **Status** In Progress - 2 **Assessment type**

× Clear filters

<p>AGMarlee UATColt</p> <p>252 days overdue In progress</p> <p>Aged Care ID: AC34890376</p> <p>Date of birth: 31/07/1941</p> <p>Assessment type: Residential Permanent</p>	<p>Pridata UAT</p> <p>256 days overdue Urgent In progress</p> <p>Aged Care ID: AC98773435</p> <p>Date of birth: 01/07/1924</p> <p>Assessment type: Residential Permanent</p>	<p>Sync Referrals</p> <p>New Assessment</p> <p>Quality Assurance</p> <p>Upload 2 Completed</p> <p>Dashboard</p>
---	--	---



23.3 Undertaking Assessments

The steps to undertake an assessment on the App are as follows.

! For comprehensive information on how to complete the clinical component of the assessment, refer to your AN-ACC Assessor Manual.

1. Open and log in to the App, following the process in [Find a Client](#), locate the resident you wish to assess and open their assessment referral.
2. Complete each page of the assessment which includes clinical tools.

The below screenshot shows a typical page in an assessment.

- As you complete each section, the progress bar shows grey ticks for each completed and teal arrows for in progress or incomplete sections.

- There is an overall assessment progress percentage complete indicator at the top of the screen.

- Select a specific clinical tool or page by selecting the associated tab.

→ Braden Scale

→ De Morton Mobility Index (DEMMI) - Modified

→ Australian Modified - Functional Independence Measure

- Select the information  icon next to each question, to find out more information about the question.

***Roll onto side** 

 Person is lying supine and is asked to roll onto one side without external assistance

Unable

Able

! You must fill out all mandatory questions. Mandatory fields are shown by a red line over the field name and a red asterix.

- Select the double chevron << on the top right side of the screen to expand the menu and to navigate to the previous and next sections.

Nia Sharma
Connected
Unrestricted 1 UAT

UAT Pitz RESI- HCP & STRC outlet
AC67952275

36% complete

More options

- Identification and assessment details
- Palliative Care
- Nursing
- Resource Utilisation Group - Activities of Daily Living
- Australia-modified Karnofsky Performance Status
- Frailty
- Braden Scale
- De Morton Mobility Index (DEMMI) - Modified
- Australian Modified - Functional Independence Measure
- Behaviour Resource Utilisation Assessment
- Assessor comments form

DEMMI

Bed

***Bridge**

Unable

Able

***Roll onto side**

 Person is lying supine and is asked to roll onto one side without external assistance

Unable

Able

***Lying to sitting**

Unable

Minimal assistance

Supervision

Independent

Chair

***Sit unsupported in chair**

Unable

10 seconds

>> Close menu

? Help

 Clear page information

 DEMMI Tool Notes

← Previous section

→ Next section

- In this menu you can also select? **Help** to display more detailed information about that page or tool. It will open on another screen. Select **Close** to return to the assessment.

1 of 1

← Close

De Morton Mobility Index (DEMMI) - Modified

Description of section
Measures the mobility of older people across clinical settings and rates what the person is capable of doing (Can Do), rather than what they currently do.

- Capability – take account of physical function, cognition and behaviour, motivation, and organisational ability.
- If differences in function occur in different environments or times of the day (i.e. day/night), record the lower score.
- Preferably base this tool on direct observation, unless there is a falls risk or it causes the resident distress.
- Rate with current aids and appliances in place.

Scoring definitions

- *Minimal assistance* – “hands-on” physical but minimal assistance, primarily to guide movement.
- *Supervision* – another person monitors the activity without providing hands-on assistance. May include verbal prompting.
- *Independent* – the presence of another person is not considered necessary for safe mobility.

- On each tool, there is a notes section where you can enter notes or comments.

Selecting the speech bubble icon  next to this section will expand the comments section.

Any comments made here are for your own reference and will not be uploaded with the assessment.

The below screenshot example shows the **AM-FIM Tool Notes** page.

AM-FIM Tool Notes

Comments go here

3

3

16/5000

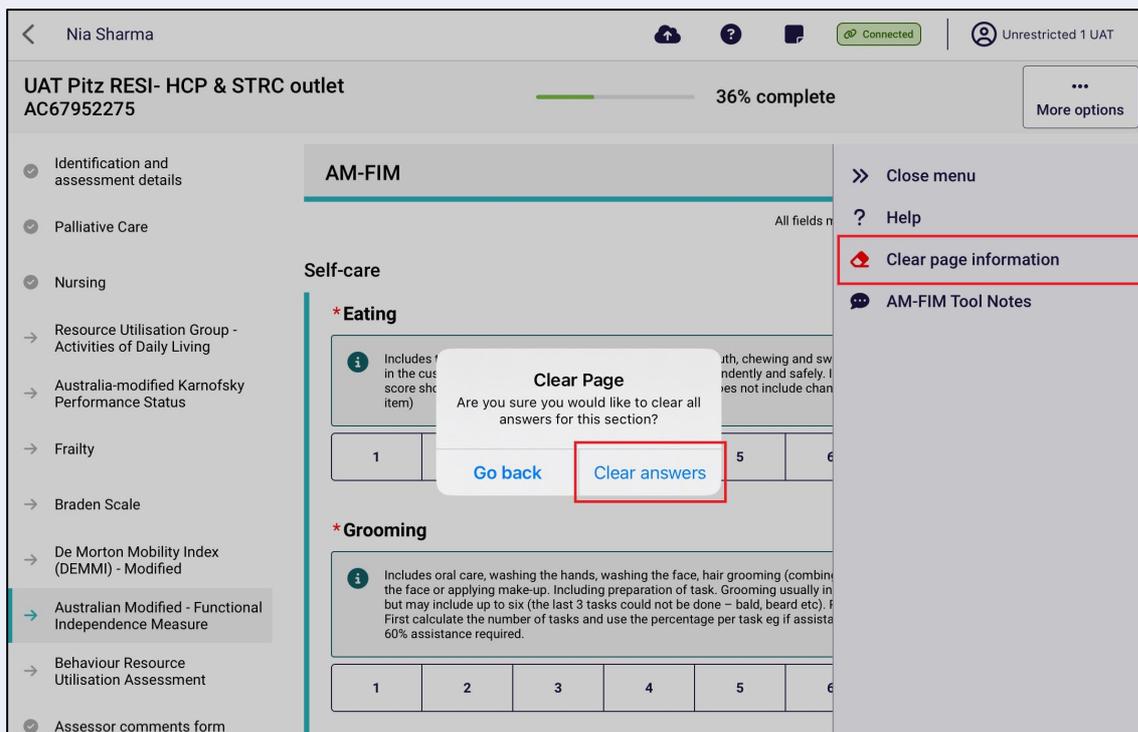
Clear

3 Any notes that you enter here are for your own reference and use. They will not be uploaded with the assessment.

With some notes sections there is an additional information  section. It gives additional information to that in the Help sections.

AM-FIM Tool Notes	
1	Total assistance (subject = less than 25%)
2	Maximal assistance (subject = 25%+)
3	Moderate assistance (subject = 50%+)
4	Minimal assistance (subject = 75%+)
5	Supervision (subject = 100%+)
6	Modified independence (device)
7	Complete independence (timely, safely)

- Finally, there is a **Clear page information** section denoted by the red eraser icon. Select this and then select **Clear answers** at the pop-up, to permanently erase answers.



The screenshot shows the AM-FIM tool interface for user Nia Sharma. The page is titled "UAT Pitz RESI- HCP & STRC outlet AC67952275" and shows a progress bar at 36% complete. The main content area is titled "AM-FIM" and includes sections for "Self-care", "Eating", and "Grooming". A "Clear Page" dialog box is displayed in the center, asking "Are you sure you would like to clear all answers for this section?" with "Go back" and "Clear answers" options. On the right side, a menu is open, showing options: "Close menu", "Help", "Clear page information" (highlighted with a red box), and "AM-FIM Tool Notes".



24. Undertaking Quality Assurance and Training Assessments

RAC funding assessors can conduct Quality Assurance and Training assessments in the App. There are two methods available.

! Quality Assurance and Training assessments cannot be undertaken on self-referred assessments.

24.1 Sharing referral details with the assessor undertaking the assessment

The unrestricted RAC funding assessor is assigned to undertake the assessment.

1. Out of your facilities, select the facility where the resident being assessed lives.

The screenshot shows the app interface for an Unrestricted 1 UAT user. The header displays 'Welcome Unrestricted 1 UAT' and 'Referrals last synced 13:39 today'. Below this, there is a section titled 'Facilities (AN-ACC)' with two facility cards: 'Edge Hill Orchards' (365 days overdue) and 'Gosling Creek Aged Care' (270 days overdue). Each card lists assessment status: 'Not started', 'In progress', and 'Completed'. To the right of the facilities are four action buttons: 'Sync', 'No uploads pending', 'Quality Assurance', and 'No backups pending'.

Facility	Overdue	Not started	In progress	Completed
Edge Hill Orchards	365 days overdue	1	0	0
Gosling Creek Aged Care	270 days overdue	4	0	0

2. Next, select the client.

The screenshot shows the app interface for an Unrestricted 1 UAT user. The header displays 'Dashboard UAT Pitz RESI- HCP & STRC outlet (7 Assessments)'. Below this, there is a section titled 'Filters' with '2 assessments, sorted by First Name A-Z, filtered by 'Ni''. There are two client cards: 'AGLeonard UATLinnie' (238 days overdue, Not started) and 'Nia Sharma' (102 days overdue, Not started). Each card lists assessment details: 'Aged Care ID', 'Date of birth', and 'Assessment type'. To the right of the clients are four action buttons: 'Sync', 'New Assessment', 'Quality Assurance Assessment', 'No uploads pending', and 'No backups pending'.

Client	Overdue	Not started	Aged Care ID	Date of birth	Assessment type
AGLeonard UATLinnie	238 days overdue	Not started	AC08129645	08/12/1940	Residential Permanent
Nia Sharma	102 days overdue	Not started	AC67952275	03/02/1967	Residential Permanent



3. A Pre-assessment screen appears. The assigned assessor can select if a **Quality Assurance** or **Training** assessment is also being conducted.

4. The assessment details to be shared will be displayed. The RAC funding assessor that will be conducting the Quality Assurance or Training assessment must scan the QR code or enter the Referral ID on their device.

Alternatively, referral details can also be shared after starting an assessment. On the assessment page, select the **ellipses (three dots)** and select **Share referral details** at the pop-up.

The screenshot shows the 'Assessment Details' screen for 'UAT Pitz RESI- HCP & STRC outlet AC67952275'. The progress is 9% complete. A 'More options' menu is open, showing options: 'Clear page', 'Remove assessment', 'Reject referral', and 'Share referral details'. The 'Share referral details' option is highlighted with a red box. The main content area includes sections for 'Assessment Details', 'Care type', 'Assessment date', and 'Client details'.

In the Share referral details screen, select the **Quality Assurance** or **Training** options.

The screenshot shows the 'Share referral details' screen. The question is 'Is a quality assurance or training assessment also being conducted?'. There are two buttons: 'QUALITY ASSURANCE' and 'TRAINING', both of which are highlighted with a red box.

! Referrals can only be shared by the assessor assigned to undertake the assessment. Referrals cannot be shared after the assessment is finalised and uploaded.



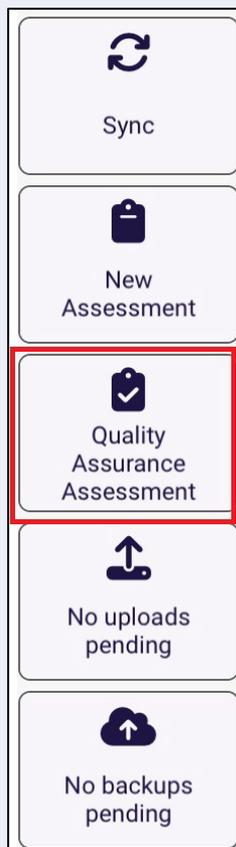
24.2 Scanning referral QR code or entering the referral ID

1. Select the appropriate assessment button under **Quick Actions** in the main menu.

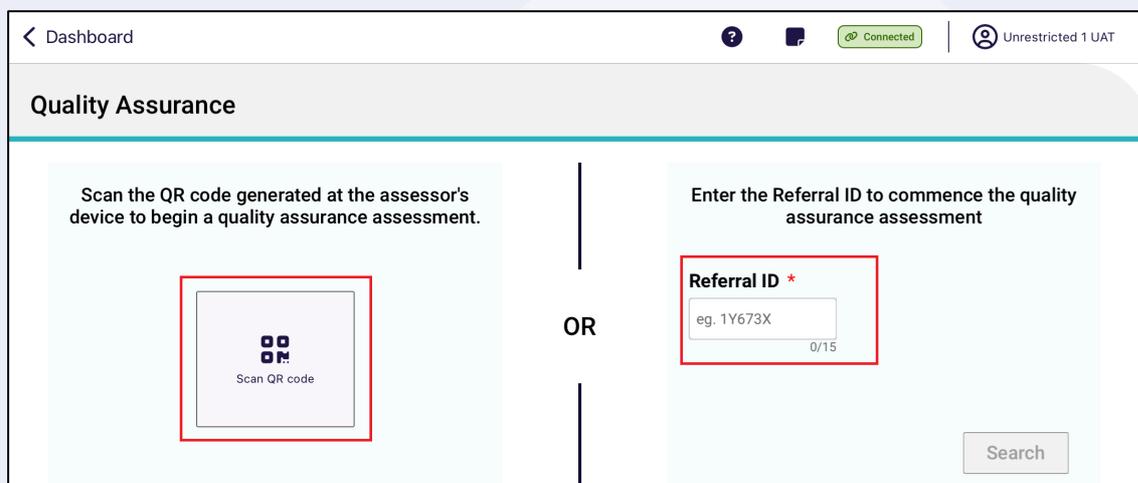
! The **Quality Assurance** and **Training** buttons visible will be dependent on the role of the user.

Senior RAC funding Assessors undertaking a Quality Assurance will need to select the **Quality Assurance** button, or if conducting a Training assessment, select the **Training** button.

A RAC funding assessor (Restricted) undertaking a Training assessment will need to select the **Training** button.



2. Select either to **Scan the QR code** generated on the device of the RAC funding assessor that will undertake the assessment, or enter the **Referral ID**. Then select **Search**.



After the Referral ID is successfully matched, confirm the client's details before starting the Quality Assurance or training assessment.



If the RAC funding assessor has been unable to successfully match the Referral ID, this could be due to a [connectivity issue](#) or the referral ID is not valid. If there is a connectivity issue a [local \(offline\) assessment](#) can be undertaken.

3. The Quality Assurance or Training assessment screen will now appear. A banner at the top of the screen indicates the type of assessment type that is being undertaken. The below screenshot shows the Quality Assurance assessment example.

You are conducting a Quality Assurance Assessment

! RAC funding assessors that have started a Quality Assurance or a Training assessment will not have the ability to reject the referral, but can remove the assessment.

24.3 Local (Offline) Assessments

Assessments could be done offline if there is an issue with internet connectivity. This applies to normal assessments as well as Quality Assurance and Training assessments. However, the assessment cannot be uploaded to the My Aged Care system until the client details that were entered whilst offline are successfully matched with a client record in the system.

The screenshot shows the 'New Assessment' screen. At the top, there is a status bar with a back arrow, a help icon, a 'Not connected' indicator, and a user profile 'Unrestricted 1 UAT'. Below this is a header 'New Assessment'. The main content area has a light blue background with the text 'Enter the client's My Aged Care identifier to search for their client record' and a search input field containing 'AC49733751' and a 'Search' button. Below the search area is a red error message: 'You are operating offline and it is not possible to match the client identifier that you entered with a client record. You can start an assessment while offline, but it cannot be uploaded until the client details that you enter are matched with a client record.' At the bottom, there is a 'Start Assessment' button.

After starting a local assessment, you will be required to complete all mandatory fields including assessment details and client details.

The screenshot shows the 'Add client' screen. At the top, there is a status bar with a back arrow, a help icon, a 'Not connected' indicator, and a user profile 'Unrestricted 1 UAT'. Below this is a header 'Add client'. The main content area has a white background with several fields: 'Facility *' with a dropdown menu showing 'UAT Pitz RESI- HCP & STRC outlet'; 'Care Type *' with radio buttons for 'Permanent' and 'Respite'; 'Self-Referral Reason *' with radio buttons for 'New Permanent Resident' and 'Respite Resident'; 'Assessment Date' with a date input field showing '06/06/2024' and a calendar icon; 'Aged Care ID *' with an input field containing 'AC49733751' and a '10/10' character count; and a checkbox labeled 'The resident has only one name'.



Once back online and connected to the internet, you will be required to match the local assessment with the correct Referral ID after commencing the assessment. This can be done when they have internet connectivity and selecting the **Matched client** button.

⚠ You will not be able to upload this assessment until the client details entered are matched to the correct client record using the MATCH CLIENT button

You are conducting a Self Referral Assessment

UAT Pitz RESI- HCP & STRC outlet
AC49733751

18% complete

Match Client

More options

Identification and assessment details

- Palliative Care
- Nursing
- Resource Utilisation Group - Activities of Daily Living
- Australia-modified Karnofsky Performance Status
- Frailty
- Braden Scale
- De Morton Mobility Index (DEMMI) - Modified
- Australian Modified - Functional Independence Measure
- Behaviour Resource Utilisation Assessment

Assessment Details

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

*** Care type**

Permanent

Respite

Assessment date

6 June 2024

*** Was PPE supplied by your organisation used?**

Yes

No

*** Is the Client receiving care in a Memory Support Unit?**

Yes

No

If the details do not match, you will need to go back and update the details to match or choose which details to use if the client ID is matched correctly. You will not be able to click **Confirm** unless the details are corrected.

Match the client's details

⚠ The client details that you entered in the assessment do not match with the client record.
Go back and check the details that you have entered and search again.

	Client details entered	Details from client record
First Name	Cole son	Coleson
Last Name	McLaughlin	Mclaughlin
Date of Birth	24 November 1932	24 November 1932
Gender	Male	Male
SPARC ID		
ACMPS ID		

Confirm



Once the details match, select **Confirm**, and continue with the rest of the assessment.

Match the client's details

⚠ One or more of the client details entered do not match with the client record.

If this is not the correct client record, go back and check the details that you have entered and search again.

If you confirm that this is the correct client record, the client details entered will be overwritten with those from the client record.

	Client details entered	Details from client record
First Name	Coleson	Coleson
Last Name	McLaughlin	Mclaughlin
Date of Birth	24 November 1932	24 November 1932
Gender	Male	Male
SPARC ID		
ACMPS ID		

Confirm

25. Completing, re-opening and uploading assessments

25.1 Completing an assessment

If there are any pages that are incomplete or needs review, the progress bar will be under 100% and the page that has not been completed will not show a tick icon.

1. Select each of the pages that have an arrow to complete.

Nia Sharma
Connected
Unrestricted 1 UAT

UAT Pitz RESI- HCP & STRC outlet
AC67952275

73% complete

More options

- Identification and assessment details
- Palliative Care
- Nursing
- Resource Utilisation Group - Activities of Daily Living
- Australia-modified Karnofsky Performance Status
- Frailty
- Braden Scale
- De Morton Mobility Index (DEMMI) - Modified
- Australian Modified - Functional Independence Measure
- Behaviour Resource Utilisation Assessment
- Assessor comments form

RUG-ADL

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

***Bed Mobility**

1 - Independent or Supervision only
2 - (Not a valid option for this question)
3 - Limited physical assistance
4 - Other than two persons physical assist
5 - Two or more persons physical assist

***Toileting**

1 - Independent or Supervision only
2 - (Not a valid option for this question)
3 - Limited physical assistance
4 - Other than two persons physical assist
5 - Two or more persons physical assist

For further information, go to My Aged Care | www.myagedcare.gov.au | 1800 836 799

137

- If your input has contradicted a previous input in another tool, you will be shown the following warning. You will be able to choose to amend either the input that you have just created or the other contradicted input.

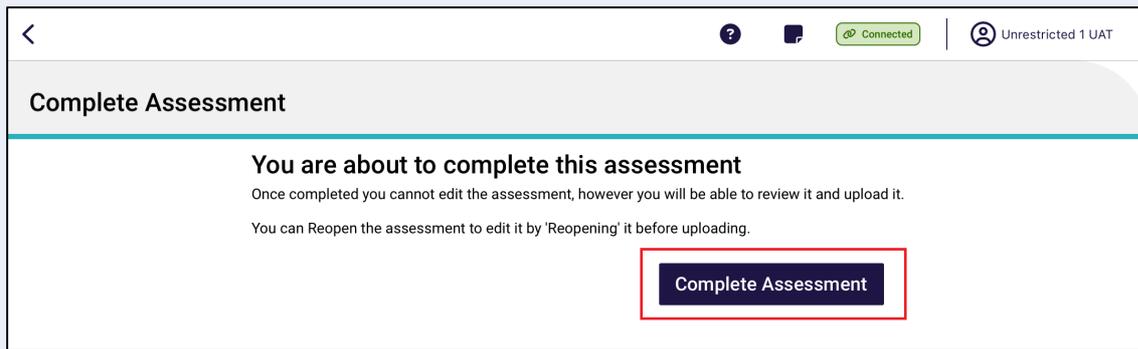
The screenshot shows the 'UAT Pitz RESI- HCP & STRC outlet' form for AC67952275. The progress bar indicates 91% completion. A warning message is displayed: 'The following warning conditions have been found. Please review them before continuing. Transfers - Toilet'. Below this, the 'AM-FIM' section is visible, with a sub-warning: 'Warning: Please review the FIM Transfer Toilet and Braden Scale Activity Scores as these may be inconsistent.' The 'Toilet' section has a score of 6, and the 'Tub or Shower' section has a score of 3. The 'Assessor comments form' is also visible in the sidebar.

- Once all pages are complete (tick icons) and the progress bar is showing 100% completed, select **Complete** on the top right.

The screenshot shows the same form now at 100% completion. The progress bar is full, and the 'Complete' button is highlighted in the top right corner. The 'Assessment Details' section is visible, showing 'Care type' as Permanent, 'Assessment date' as 06/06/2024, and two questions: '* Was PPE supplied by your organisation used?' and '* Is the Client receiving care in a Memory Support Unit?'. The 'Client details' section shows 'The resident has only one name' as No. The 'Assessor comments form' is also visible in the sidebar.

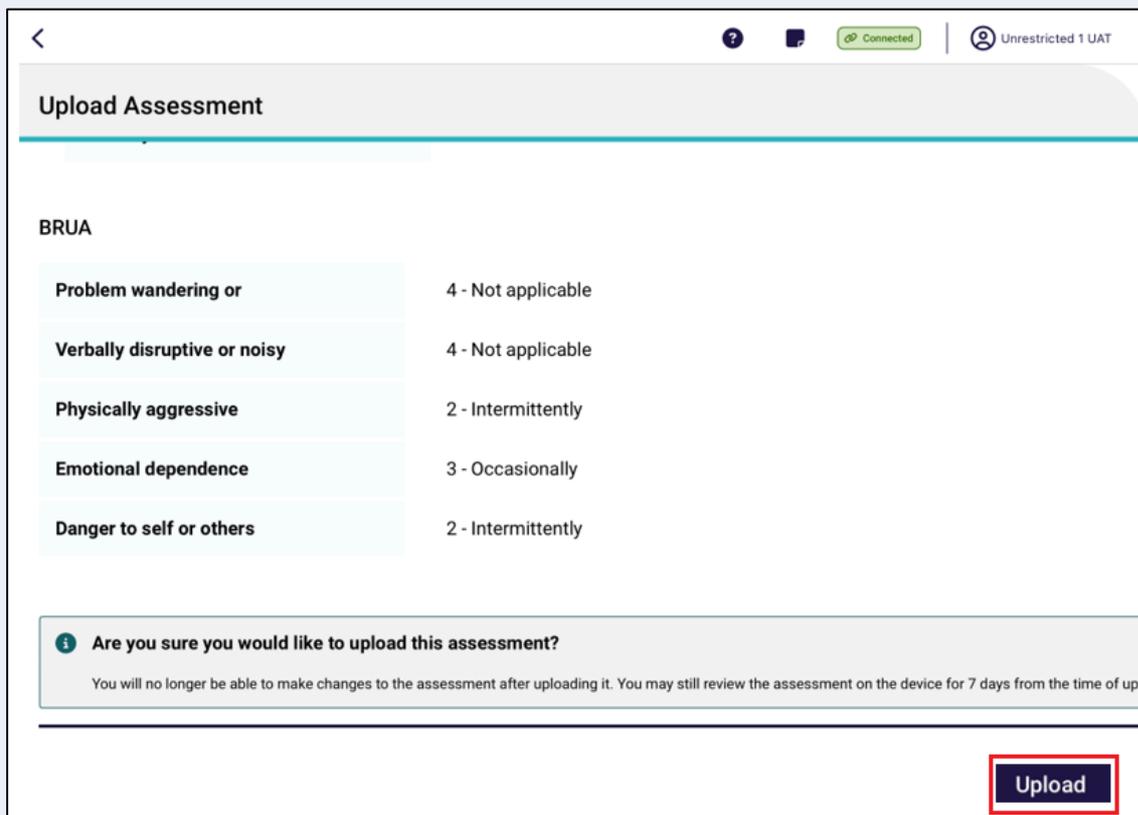


4. Select **Complete Assessment** again to confirm.



5. A summary of the assessment appears. Scroll to the bottom and then select **Upload**. The assessment will remain in the completed status until either the **Upload** button is pressed or automatically uploaded after 7 days.

After upload, the assessment will disappear from the **In-progress assessments** section of the main menu.



25.2 Re-opening a completed assessment

An assessment that has the status of **Completed** or **Uploaded** can be reopened, but only **Completed** assessments can be reopened for edits. Uploaded assessments can be reopened for view only.

1. To reopen a complete assessment, select the Facility, then select **Completed**. Select the assessment to reopen.

Dashboard header: Welcome Unrestricted 1 UAT, Referrals last synced 15:24 today. Status: Connected, Unrestricted 1 UAT.

Facilities (AN-ACC)

Facility Name	Days Overdue	Not started	In progress	Completed
Edge Hill Orchards	372 days overdue	1	0	0
Gosling Creek Aged Care	277 days overdue	4	0	0
RFA Auto Facility	262 days overdue	2	0	0
UAT Pitz RESI- HCP & STRC outlet	248 days overdue	6	1	1

UAT Pitz RESI- HCP & STRC outlet (Completed count highlighted in red box)

Right sidebar actions: Sync, No uploads pending, Quality Assurance, Backup Assessment.

! Assessments with a 100% progress completed indicator will still appear in the **In-progress assessment** section of the main menu. These assessments are technically complete but is not officially in the Completed status until the **Complete Assessment** button is selected.

Dashboard: UAT Pitz RESI- HCP & STRC outlet (6 Assessments). Status: Connected, Unrestricted 1 UAT.

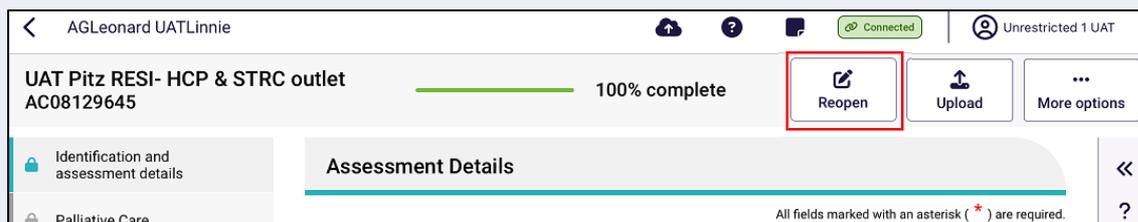
Filters: 6 assessments, sorted by First Name A-Z

Assessment Name	Days Overdue	Status	Aged Care ID	Date of birth	Assessment type
AGAntwon UATHayes	252 days overdue	Completed	AC23765274	09/11/1940	Residential Permanent
AGLeonard UATLinnie	252 days overdue	Completed	AC08129645	08/12/1940	Residential Permanent
AGMarlee UATColt	252 days overdue	Not started	AC34890376	31/07/1941	Residential Permanent
Pridata UAT	256 days overdue	Urgent, Not started	AC98773435	01/07/1924	Residential Permanent

Right sidebar actions: Sync Referrals, New Assessment, Quality Assurance, Upload 2 Completed, Backup 2 Assessments.



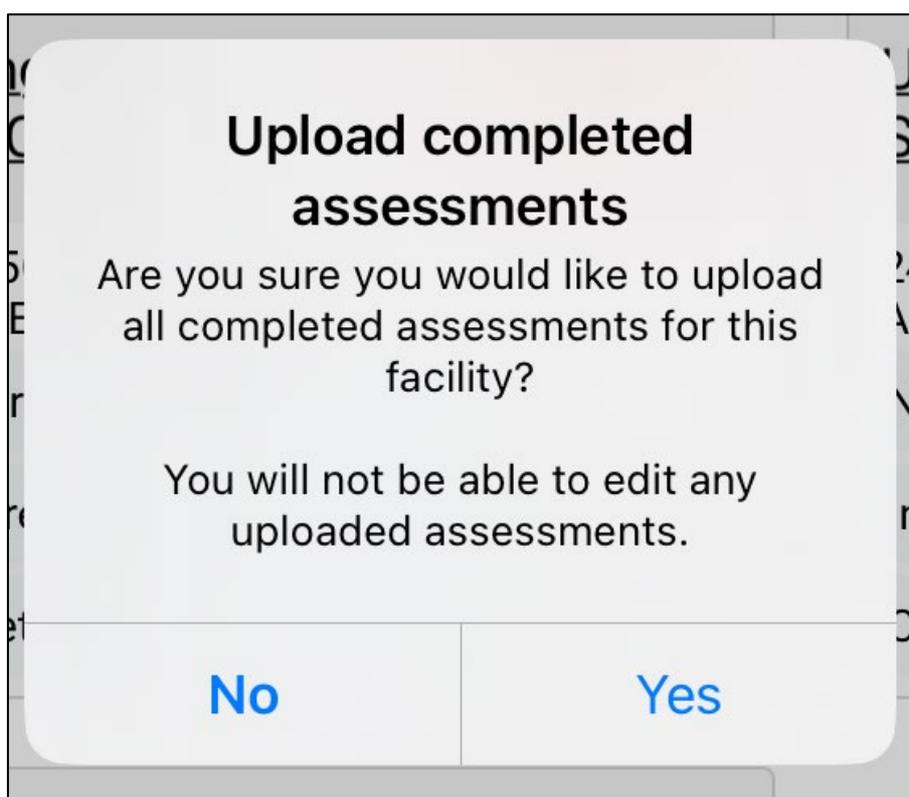
2. The selected assessment displays. Select **Reopen**.



3. The completed assessment will be reopened for edits. It will need to go through the process for [Completing an assessment](#) again.

25.3 Re-opening an uploaded assessment

! Once the assessment has been uploaded you are unable to reopen and edit the assessment.



25.4 Uploading Assessments

RAC funding assessors can upload assessments once they are complete.

The assessment will remain in the completed status until either the **Upload** button is pressed or automatically uploaded after 7 days. After upload, the assessment will disappear from the **In-progress assessments** section of the main menu and will move to the Uploaded section of the Facility's page.

! You must have an active internet connection to upload the assessment.

If you do not have an active internet connection, the completed assessment will be saved on your device for 7 days and uploaded when you enter an internet service area.

1. After completing the steps in [Completing an Assessment](#), a summary of the assessment appears. Scroll to the bottom and then select **Upload**.

2. After going to the Facility page and selecting **Completed**, all completed assessments can be uploaded at once by selecting **Upload [number] Completed**.

26. Removing Assessments and Clearing Assessment Data

- ! Removing an assessment from the device will permanently delete any assessment information recorded on that device.
- ! Completed but not yet uploaded assessments cannot be removed.
- ! Removing an uploaded assessment from your device does NOT remove the data from My Aged Care.



26.1 Removing an uploaded assessment

To remove an uploaded assessment:

1. Open the uploaded assessment that you wish to remove. See the [Find A Client](#) section for more details.
2. Click the **More options** button in the top righthand side

The screenshot shows a user interface for an assessment. At the top, it displays the user's name 'Nia Sharma' and the assessment title 'UAT Pitz RESI- HCP & STRC outlet AC67952275'. A progress bar indicates '100% complete'. A red box highlights a 'More options' button in the top right corner. The main content area is divided into sections: 'Assessment Details' and 'Client details'. Under 'Assessment details', there are fields for 'Care type' (Permanent), 'Assessment date' (6 June 2024), and two questions: 'Was PPE supplied by your organisation used?' (No) and 'Is the Client receiving care in a Memory Support Unit?' (No). Under 'Client details', there is a question 'The resident has only one name' (No) and a 'First name' field.

3. Select **Remove assessment** from the pop-up. This will NOT remove the assessment data from the Department's system.

The screenshot shows a pop-up menu with two options: 'Remove assessment' and 'Share referral details'. A red box highlights the 'Remove assessment' option.



26.2 Removing an in-progress assessment

To remove an in-progress assessment:

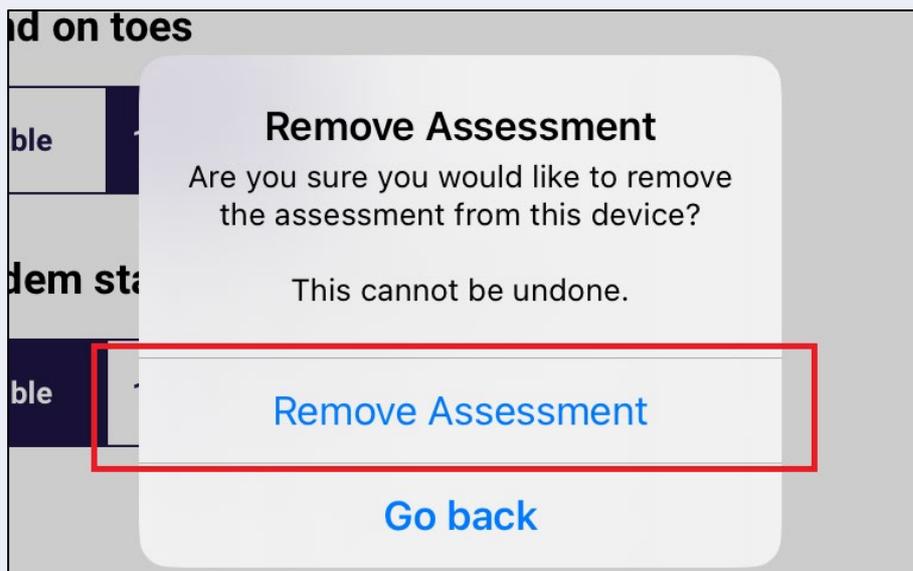
1. Open the assessment that you wish to remove. See the [Find A Client](#) section for more details.
2. Select the **More options** button in the top right corner of the app.

The screenshot shows the Pridata UAT app interface. At the top, it displays 'Pridata UAT' and 'Unrestricted 1 UAT'. The main header shows 'UAT Pitz RESI- HCP & STRC outlet AC98773435' and a progress bar at '82% complete'. A red box highlights the 'More options' button in the top right corner. The left sidebar lists various assessment categories, with 'De Morton Mobility Index (DEMMI) - Modified' selected. The main content area shows the DEMMI assessment form with sections for 'Stand on toes', 'Tandem stand with eyes closed', and 'Walking'. The 'Walking' section includes 'Walking distance +/- gait aid' and 'Walking independence'.

3. Select **Remove assessment** from the **Select an option** pop-up.

The screenshot shows a 'Select an option' pop-up menu. The options listed are: 'Clear page', 'Remove assessment', 'Reject referral', and 'Share referral details'. The 'Remove assessment' option is highlighted with a red box.

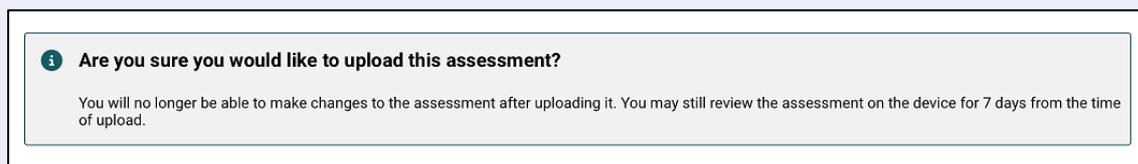
4. Select **Remove assessment** from the **Remove Assessment** pop up.



5. The assessment will be removed. If you choose the same client again from the Facilities page, you will be prompted to start a new assessment. ALL data will have been removed.

26.3 Clear Uploaded and Not Started assessments

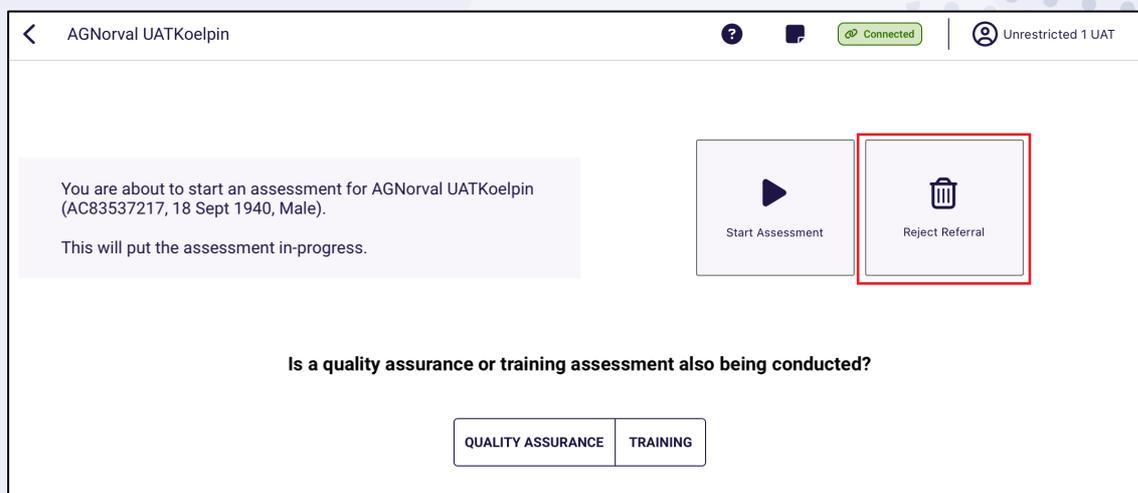
For not started or uploaded assessments, to clear them they will either require to be manually removed by following the steps set out in [26.1 Removing an uploaded assessment](#) or will automatically be removed 7 days after successfully uploading.



26.4 Rejecting a Referral

RAC funding assessors may reject a referral if a Resident is not available to be assessed. Please note that for self-referred assessments, you will not be able to reject the referral.

1. Go to the Resident's client card to display the Start Assessment screen. Then, select **Reject Referral**.



2. Select the reason for the rejection. Choose from **Client Deceased**, **Client Unavailable**, or **Other**. Please note that for **Residential Respite referrals** option of **Client has exited facility** will be available instead of **Client Unavailable**.

< ? Connected | Unrestricted 1 UAT

Reject AGNorval UATKoelpin's Referral

i Are you sure you would like to reject this referral?
All in progress assessments for this referral will be cancelled.

Referral status reason *

Client Deceased
Client Unavailable
Other

Reject Referral

a) **Client Deceased**

Select the client's deceased date if known, then select **Reject Referral**.

< ? Connected | Unrestricted 1 UAT

Reject AGNorval UATKoelpin's Referral

i Are you sure you would like to reject this referral?
All in progress assessments for this referral will be cancelled.

Referral status reason *

Client Deceased
Client Unavailable
Other

Client Deceased Date (if known) *

📅

⚠️ Cancelling this referral with the reason of Deceased will set the client record in MyAgedCare system to Deceased which will prevent future use of the record. You should only proceed with this action if you are confident that the referral is for a deceased individual.

Reject Referral



b) Client Unavailable

Client unavailable should be selected if the client is currently unavailable for some reason, for example is in hospital but is expected to return to the service or facility at some point of time in the future. Select **Reject Referral**.

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Reject AGNorval UATKoelpin's Referral

i Are you sure you would like to reject this referral?
All in progress assessments for this referral will be cancelled.

Referral status reason *

Client Deceased
Client Unavailable
Other

Reject Referral

c) Client has exited facility

This option is available for Residential Respite referrals only. Select **Reject Referral**. This option will transfer the referral to an assessment organisation at the client's registered home address.

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Reject MMO'Conner NDEve's Referral

i Are you sure you would like to reject this referral?
All in progress assessments for this referral will be cancelled.

Referral status reason *

Client Deceased
Client has exited facility
Other

Reject Referral



d) Other

If the assessment cannot be completed for any other reason, select **Other** and enter the reason in the textbox. You must enter a reason in **Rejection reason** before you will be able to reject the referral. Then, select **Reject Referral**.

An example of this would be if the resident has returned to their home in the community.

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Reject AGNorval UATKoelpin's Referral

i Are you sure you would like to reject this referral?
All in progress assessments for this referral will be cancelled.

Referral status reason *

Client Deceased
Client Unavailable
Other

Rejection reason *

Rejection reason comment here. 30/500

Reject Referral

