

# Assessor Portal User Guide 3 - Managing referrals for assessment and Support Plan Reviews

Referrals for assessment from My Aged Care are managed by the person(s) assigned the Team Leader or Triage Delegate role in the My Aged Care assessor portal (assessor portal).

This guide is intended to help staff manage assessment referrals as well as distinguish what functions sit within each role.

Team leaders can accept or reject assessment referrals. After accepting an assessment referral Triage Delegates are able to assign and complete triage. Following this Triage Delegates and Team Leaders can assign the referral to an aged care needs assessor (assessor). Team Leaders can reassign or unassign the triaged referrals as required.

Team leaders can also transfer incoming and accepted (but not yet commenced) referrals to other assessment organisations. Before accepting referrals, team leaders can change the priority of assessment referrals.

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# Team Leader and Triage Delegate functions

This guide will provide guidance for various functions that both Triage Delegates and Team Leaders can perform, please see the table below for specific functions:

Function	Team Leader	Triage Delegate
Viewing incoming, accepted and assigned assessment referrals	✓	
Viewing triaged assessment referrals	✓	<b>√</b>
Accept an incoming assessment referral	✓	
Reject or transfer an incoming, accepted or triaged assessment referral	<b>~</b>	
Assign an accepted assessment referral to myself (if a triage delegate) or another triage delegate for triage		$\checkmark$
Complete triage		×
Reassign an accepted assessment referral or an assessment while triage is in progress		4
Refer a client for urgent services before starting triage and once triage is completed		<
Convert the assessment between Home Support and Comprehensive		~
Assign an assessment to an assessor once triage is completed	✓	~

Function	Team Leader	Triage Delegate
Reassign or unassign triaged assessment referrals.	✓	

# Viewing incoming assessment referrals and client information

Team Leaders can follow the steps below to view incoming referrals for clients assigned to the outlet.

1. Select **My Dashboard** from the home page. You can also select **Assessment referrals** on the homepage.

Assessor Portal			
Welcome Kendall			
	8	4	
<u>.dd</u>	Find a client	Assessment referrals	Review requests
	\$		
My Dashboard	Organisation administration	Residential Funding Referrals	Find a service provider
	Ś	(=)	
Reports and documents	Tasks and notifications	My Aged Care interactions	

Alternatively, select **Assessment referrals** from the tool bar at the top right-hand corner of the portal.

1800 836 799 Mon-Fri 8am - 8pm Sat 10am - 2pm									Welcon	ne Arlene
Assessor Portal	My Dashboard	Find a clien	Assessment referrals	Review requests	Residential Funding Referrals	Find a service provider	Reports and documents	Tasks and notifications	My Aged Care interactions	Logout

2. Select the Assessment referrals in the My Dashboard page.

Home   My Dashboard             My Dashboard             My Dashboard             Assessment referrals             Retrieved: 25/10/2024, 13/2	Assessor Portal	My Dashboard	Find a client	Assessment referrals	Review requests	Residential Funding Referrals	Find a service provider	Reports and documents	Tasks and notifications	My Aged Care interactions	Logout
My Dashboard	A Home   My Dashboard										
13       0       4         Assessment referrals       Residential funding referrals       4         Retrieved: 25/10/2024, 13/2       13/2       13/2	My Dashboard										
Retrieved: 25/1/02/024, 13:22	Assessment referrals	<b>O</b> Inding referrals		Review rec	<b>4</b> <sub>Juests</sub>						
	Retrieved: 25/10/2024, 13/22										•

3. You can view referrals depending on your assigned role. Select the hyperlink corresponding to the referral origin to view more details.

Assessor Portal	My Dashboard	Find a client	Assessment referrals	Review requests	Residential Funding Referrals	Find a service provider	Reports and documents	Tasks and notifications	My Aged Care interactions	Logout
Home   My Dashboard   Assessment F	Referrals									
My Dashboard	k									
Assessment referrals										
GRAZIER AGED CARE		2								
Retrieved: 20/09/2024, 15:00										

4. The Incoming referrals and Unassigned assessment referrals will be displayed.

Assessor Portal	My Dashboard	Find a client	Assessment referrals	Review requests	Residential Funding Referrals	Find a service provider	Reports and documents	Tasks and notifications	My Aged Care interactions	Logout
Home   My Dashboard   Assessment F	Referrals									
My Dashboard	k									
Assessment referrals					GRAZIER AG	ED CARE O	utlet			
GRAZIER AGED CARE		2			Incoming referrals Triage not started Urgent services per Triage in progress	nding triage		1 0 0 1		
Retrieved: 20/09/2024, 15:00					Assessment unassi	gned		Q		

! A warning notification will be displayed if there are referrals that have not been actioned within the priority timeframes.

Some assessments have overdue SLAs and need to be scheduled.

5. To view referrals, select the **Incoming referrals** tab under the **Assessment referrals** page. You can select to view assessment referrals in a card or list view by selecting the card or list icon. Your selection will be retained for the next time you log in to the portal.

Home   Assessment Referra	als		
Incoming referrals			Currently viewing GRAZIER AGED CARE Outlet
Incoming referrals Triage	e pending Accepted referrals	Referral history	
Filter by			$\odot$
Select all			
Sort Referrals by: Last Name	in order of Alphabetical (A-z	()	<b>↓</b> 60
			1 to 1 out of 1 matching result

6. In the card view, referrals can be filtered or sorted by Last name, First name or Aged Care user ID.

Sort Referrals by: Last Name	in order of ► Alphabetical (A-Z)	GO
Last Name		
First Name		
Aged Care User ID		
Suburb		
State		
PostCode		
Date Referred		
Priority		
Assessment Type		
Date Due	ys overdue	

- 7. You can view more information on the referred client, including client notes and assessment
- history by selecting the double arrow icon on the top right-hand corner of the client card.
  8. To view a client record, select VIEW FULL CLIENT RECORD from the expanded card view.

Aged 82 ( 11 August	1941 ), Male	Referred from Aged Care Gateway on 24 May 2024	
Preferences	ecorded	Action Referral due by 27 May 2024	
Assessment details	 i	Client story	
Assessment type	Home Support		
Assessment reason	the client does not require ongoing support or has ongoing multiple needs that impact their ability to remain living in the community		6
atest screening	25 April 2024		

9. The same referral and client information is available in list view. Select the double arrow icon  $\checkmark$ to the left of the client's name to expand the view.

MCGHEE Molly AC62436597 WODONGA, VIC, 3690 06/03/2023 Medium A 09/03/2023 (438 days overdue) Aged 72 ( 30 October 1951 ), Female Referred from Aged Care Gateway on 6 March 2023 Preferences No preference was recorded Action Referral due by 9 March 2023 Client story No client story was recorded Assessment details Assessment type Home Support Assessment reason Some planks I tore fr 825AD1711 Comments atest screening 6 March 2023 ۹ EW FULL CLIENT RECORD ACCEPT REJECT TRANSFER

! A banner will be displayed on the referral if additional attachments have been added to the client's record as part of an inbound referral.

If the client has pending support relationships, a banner will be displayed on the referral. Team Leaders and Triage Delegates are able to confirm pending support relationships for clients

The process is described in My Aged Care - Assessor Portal User Guide 2 - Registering support people and adding relationships.

A banner will be displayed on the referral if it was issued as a Direct referral.

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Note: Direct referrals have the same key performance indicators as regular referrals. The word 'direct', indicates that the client did not receive a Support Plan Review before being referred.

DirectReferral         Requested: 23 September 2024       Requested action date: 26 September 2024         Aged 71 (12 August 1953 ), Male       Referred from Aged Care Gateway on 23 September 2024         Preferences       Action Referral due by 26 September 2024         No preference was recorded       Action Referral due by 26 September 2024         Assessment details       Client story         Assessment reason       Direct Assessment - Direct referral warning message will be validated in Portal         Assessment setting       Non-Hospital         Support plan review       13 September 2024         Support plan       13 September 2024         Comprehensive Assessment       13 September 2024         Comprehensive Assessment       3 November 2024         Comprehensive Assessment       3 November 2024	×	
Aged 71 (12 August 1953), Male       Referred from Aged Care Gateway on 23 September 2024         Preferences No preference was recorded       Action Referral due by 26 September 2024         Assessment details       Client story         Assessment reason       Direct Assessment - Direct referral warning message will be validated in Portal       01/11/2021         Assessment setting       Non-Hospital       01/11/2021       Image: Comprehensive Comp		
Aged 71 ( 12 August 1953 ), Male       Referred from Aged Care Gateway on 23 September 2024         Preferences No preference was recorded       Action Referral due by 26 September 2024         Assessment details       Client story         Assessment reason       Direct Assessment - Direct referral warning message will be validated in Portal       01/11/2021         Assessment setting       Non-Hospital       01/11/2021         Support plan review       13 September 2024         Support plan       13 September 2024         Comprehensive Assessment       13 September 2024         Comprehensive Assessment       3 November 2024         Comprehensive Assessment       3 November 2024		
Preferences       Action Referral due by 26 September 2024         Assessment details       Client story         Assessment type       Comprehensive       18/11/2021         Assessment reason       Direct Assessment - Direct referral warning message will be validated in Portal         Assessment setting       Non-Hospital       01/11/2021         Support plan review       13 September 2024         View ALL 10 CLIENT NOTES         Comments         Comments         Comments         Comments         Comments		
Assessment details       Client story         Assessment type       Comprehensive       18/11/2021       Image: Client story         Assessment reason       Direct Assessment - Direct referral warning message will be validated in Portal       01/11/2021       Image: Client story         Assessment setting       Non-Hospital       01/11/2021       Image: Client story       Image: Client story         Support plan review       13 September 2024       Image: Client story       Image: Client story       Image: Client story         Comprehensive Assessment       13 September 2024       Image: Comments       Image: Comments       Comments         Comprehensive Assessment       3 November 2021       Image: Comments       Comments       Comments	4	
Assessment type Comprehensive 18/11/2021 Assessment reason Direct Assessment - Direct referral warning message will be validated in Portal Assessment setting Non-Hospital 01/11/2021 Support plan review 13 September 2024 Support plan 13 September 2024 Comprehensive Assessment 13 September 2024 Comprehensive Assessment 3 November 2021 Comments Co		
Assessment reason Direct Assessment - Direct referral warning message will be validated in Portal Assessment setting Non-Hospital 01/11/2021  Support plan review 13 September 2024 Support plan 13 September 2024 Comprehensive Assessment 13 September 2024 Comprehensive Assessment 3 November 2021 Comprehensive Assessment 3 No		
Assessment setting Non-Hospital 01/11/2021		
Support plan review     13 September 2024       Support plan     13 September 2024       Comprehensive Assessment     13 September 2024       Support plan     13 September 2024       Comprehensive Assessment     3 November 2021       Support plan     3 November 2021		
Support plan     13 September 2024     Image: Comprehensive Assessment     13 September 2024     Image: Comprehensive Assessment     VIEW ALL 10 CLIENT NOTES       Comprehensive Assessment     3 November 2021     Image: Comprehensive Assessment     Comprehensive Assessment     Source Assessment		D
Comprehensive Assessment 13 September 2024 (a) VIEW ALL 10 CLIENT NOTES Comprehensive Assessment 3 November 2021 (a) Comments Cobabitant details		
Comprehensive Assessment 3 November 2021		
Conabilant details		

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10. If you want to view the information available in the client record you can either go back on your internet browser to return to the **Incoming referrals** page or choose the **Incoming referrals** option from the tool bar.

	A Home   Assessment	t Referrals			
Incoming referrals					
Incoming referrals Triage pending Accepted referrals Referral					
		•			

# Accepting incoming assessment referrals and changing the priority

Once a Team Leader has viewed the client record, they can accept or reject the referral. Follow the steps below to accept a referral and change the priority of a referral if required.

1. Select ACCEPT from the expanded card or list view.

Farah Tate has pending a support relationships	
Aged 86 ( 17 March 1938 ), Male Preferences No preference was recorded Assessment details Assessment type Home Support Assessment reason Latest screening 6 March 2023	Referred from Default Organization on 6 March 2023 Action Referral due by 9 March 2023 Client story No client story was recorded Comments Cohabitant details Rayaan TATE
VIEW FULL CLIENT RECORD ACCEPT REJECT TRANSFER	~

•

*	FIELD	Lilly	AC651439	935 DO 260	WNER, ACT, D2	19/02/201	9 22/02/2019 (Due in 3 cays)	🛑 Medium	
	Aged 8	34 ( 17 Febru	ary 1935 ), F	emale		Referred fro	om Aged Care Gateway on 19 F	ebruary 2019	
	Prefer	ences				Action Ref	erral due by: 22 February 201	9	
		amont dotai	recorded			Client story	/		
	Asses	sment detai	Homo Sun	port		No client sto	ory was recorded		
	Asses	sment reasor	the client is	s eligible for C	HSP				
	Latest	screening	19 Februa	ry 2019					
	VIEV	V FULL CLIEN	T RECORD	VIEW PDF	OF CLIENT RECORE				
	ACC	EPT RF.J	FCT TRA	NSFFR					
L '									- -

! Team Leaders can bulk-accept assessment referrals by selecting the tick box next to each client they would like to accept, or by using **SELECT ALL** for all client referrals assigned to their outlet.

The bulk-accepting function defaults the clients' priority to medium.

Team leaders will be unable to change the priority when bulk-accepting referrals.

Bulk-accepting will default assessment setting to **Non-Hospital**. Team Leaders can then change the setting to **Hospital** as required.

- 2. Confirm that the priority of the assessment referral is correct and select the **Assessment setting**. To change the assessment priority, choose from the options provided in the drop down.
- ! When accepting a referral, team leaders can add a free text information into the **Triage category**. Once the referral has been accepted, the information can be used to assist with finding referrals via the search function. This free text option is not to be confused with the triage process that is a required process for accepting referrals.

Accept this referral for Molly Mcghee	×
Change assessment priority? 🕐	-
Triage category:	-
ACCEPT	EL
	Accept this referral for Molly Mcghee Change assessment priority? ? Triage category:

3. Team leaders can change the assessment priority for the referral. When doing this, a reason for changing the priority will need to be provided and a reason provided in the free text box. If

the assessment priority is changed, a new priority timeframe will be calculated and applied to the referral.

! Direct referrals priority default to being high when issued. Team leaders can change the priority of direct referrals when accepting if they determine the client can safely access the assessment at a lower priority level.

Accept this referral for Molly Mcghee	×
Change assessment priority? 😨	
Reason for changing priority *	
Reason description: *	
Triage category:	
ACCEPT	CANCEL

<u>Note</u>: The timeframe will continue to be calculated from the date the referral was issued, not the date the priority was changed.

! As part of the Single Assessment System Program contract, key performance indicators will consider the setting in which the interaction with the client takes place, specifically a non-Hospital or Hospital setting.

Team leaders can select the assessment setting while accepting the referral.

<u>Note</u>: Before commencing the assessment, assessors should verify the information entered by the team leader, noting that the assessment setting may have changed since between the time of the acceptance of the referral and when the assessment takes place.

You can update the assessment setting by selecting **Edit Assessment Setting** in the expanded client card, depending on your role:

- the team leader on the accepted referrals view, or
- the assessor on the current work view.

! W	Olin VELLER			lient card
or	Assessment setting		×	rated
A٩				Support
PI	If you edit the assessment setting for this client, you	must also edit the assessment setting in the IAT.		
	Assessment setting* ?			
	Hospital     Non-Hospital			
			SAVE	
		· (5)(01) _ 2225		
		Accepted on 6 February 2025		
1	lo preference was recorded	Completed Triage due by 9 February 2025		
4	ssessment details	Client story No client story was recorded		
F	NAO-preference Yes	Comments		
	ssessment reason Self-Referral			
4	ssessment setting Hospital			
4	ssessor Africa Green			
1	riage conducted by Africa Green			
5	upport plan   Triage Completed	۹		
0	comprehensive Assessment 🛛 Triage Completed	۲		
	VIEW FULL CLIENT RECORD			
	REFER URGENT SERVICES START ASSESSMENT			

4. Once the referral has been accepted, the referral will move into the **Triage pending** tab under **Unassigned**.

# **Assigning Triage**

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

For further information on the Triage Delegate role, visit <u>Assessor Portal User Guide 12 -</u> <u>Managing Delegate Roles.</u>

Once an assessment referral has been accepted, it will display with a Triage pending status. A Triage Delegate will then need to assign the referral to themselves or to another Triage Delegate for triage.

Once an assessment has been assigned to a Triage Delegate, they can proceed with the triage, reassign the triage to another Triage Delegate or unassign themselves and place the accepted referral back into the triage pending queue.

1. To access triage pending referrals, select the Triage pending tab.

<u>Note:</u> If the Triage delegate has access to multiple outlets, one will need to be selected before continuing with triage.

Once a referral has been accepted it will be under **Triage pending** and unassigned. You will have to filter the **Assigned to** drop down and select **unassigned**, then select **FILTER**.

Triage pending wring referrats	ed referrals Referral history	Currently viewing KAMINI
		te core internet
Filter by		
Last name	First name	Assigned
ADVANCED SEARCH CLEAR FILTERS	I	
Assigned to is Unassigned		
FILTER		
rt Referrals by: in on ccepted Date <del>▼</del> Ear	ser of liest to Lalest 🗸 🗸 GO	
urrent sort order is Accepted Date		

2. Expand the client card which you would like to assign triage for. To assign to yourself or another Triage Delegate for action select **ASSIGN.** 

To transfer the referral to another outlet for triage select **TRANSFER**, for further information on transferring a referral see the section <u>Transferring an assessment referral to another outlet or organisation</u>.

To reject the referral, select **REJECT**. For further information on rejecting a referral see the section <u>Rejecting an assessment referral</u>.

Anted to get stronger so they could do more around the house They also wanted to resume their social life and church the client contacted My Aged Care to arrange an assessment services.  ame to the client's house and developed a support plan to their goals.  B CLIENT NOTES  t details	
the display solving solving where so call life and church the plan wanted to resume their social life and church the client contacted My Aged Care to arrange an assessment services.	
2 ame to the client's house and developed a support plan to hieve their goals. .8 CLIENT NOTES 5 t details	
	nic M
	ige Pat

3. When selecting **ASSIGN** a pop up will appear. From this you will be able to assign the triage decision for the client either to yourself or other Triage Delegates from the selected outlet. Once this has been selected, select **ASSIGN**.

A	ssign triage decision for Olliver LEW	4
Assistent of the second	an lo" te fonserrate SPICER amaal LLOYD basil SHULTZ bbadiah MURRY betrie RUVALCABA farma MCKAY bonta PAULINO Dutlet Team Lead NEVIN denton PEARL bean SHACKELFORD ungelita HERBST thristel ZEPEDA umparo SALCIDO fargret PIERSON fargret PIERSON fargret SPIAN esely KUNZ awad EGAN shten CARVALHO amekia MARKHAM fatthias HYMAN kong OTT koron LIBBY	
	ASSIGN CANCEL	1

- 4. Once the triage has been assigned, the client card will appear under the Triage pending tab., Ensure that the Assigned filter is set to Assigned to me so that clients assigned to you can be found under the Triage Not Started heading. The expanded client card will have the options to:
  - Start triage
  - Reassign, for further information on reassigning a referral see <u>Unassign or reassign</u> referral to an assessor.
  - Refer to urgent services, for further information on referring for urgent services see <u>Referring for urgent services</u>.
  - Transfer, for further information on transferring a referral see <u>Transferring an</u> <u>assessment referral to another outlet or organisation</u>.
  - Reject, for further information on rejecting a referral see <u>Rejecting an assessment</u> referral.

When selecting **REASSIGN**, alternative Triage Delegates will be provided as well as the option to **Place back in the delegate queue** this will place the client back into a **Triage pending** status and in the queue for allocation.

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				riage pending Accepted referral	oming referrals Triage pend
are consusting	ct, a privacy breach may occur.	t for. If the person details are	1 this asses		
E Outlet ACAT-RAS	Referred from GRAZIER AGED CARE Outlet AC on 12 February 2025 Accepted on 12 February 2025	Female, Identifies as: Aborig	Aged 74 ( 29 April 19		Filter by
iry 2025	Completed Triage due by 15 February 2025	led	Preferences No preference was r	_	Last name
	Client story No client story was recorded Comments	nprehensive	Assessment details FNAO-preference Assessment type	CH CLEAR FILTERS	ADVANCED SEARCH CI
		f-Referral	Assessment reason Assessment setting	ussigned to me	Assigned to is Assigned to
		ca Green	Assessor	R	FILTER CLEAR
Iry 2	Completed Triage due by 15 February 2 Client story No client story was recorded Comments	led nprehensive I-Referral ipital ca Green	Assessment testing Assessment details FNAO-preference Assessment type Assessment reason Assessment setting Assessor	CH CLEAR FILTERS	Last name ADVANCED SEARCH CI Assigned to is Assigned to FILTER CLEAR

# **Completing Triage**

In the **Assessments** tile under the **Triage pending** tab, clients that triage has not been completed for will display under the **Triage Not Started** heading.

1. Expand the client card and select **START TRIAGE** to begin the triage.

Stella STACEY				
Please confirm that Stella STACEY, 29 April 1950, 7 this assessment for. If the person details are incorre	74 Years, AC34201301 is the person you are conducting ect, a privacy breach may occur.			
Aged 74 ( 29 April 1950 ), Female, Identifies as: Aboriginal	Referred from GRAZIER AGED CARE Outlet ACAT-RAS on 12 February 2025 Accepted on 12 February 2025			
Preferences No preference was recorded	Completed Triage due by 15 February 2025			
Assessment details         FNAO-preference       Yes         Assessment type       Comprehensive         Assessment reason       Self-Referral         Assessment setting       Hospital         Assessor       Africa Green	Client story No client story was recorded Comments			
VIEW FULL CLIENT RECORD  VIEW CLIENT REPORT START TRIAGE REASSIGN REFER URGENT SERVICE	ES REJECT TRANSFER			

Before commencing triage, consent from the client must be received using the consent script. The Consent for Triage script should be read out to the client.

2. Select **CONTINUE** to progress. The final stage of consent will require the Triage Delegate to record who the **Consent was obtained from**, options provided will be:

- The client
- The client with help from a support person
- The client's authorised representative
- Consent was not given.

Consent for Triage	>
consent. If the support person does not want their personal information to be included in the client's My Aged Care record, this should be noted in the client's My Aged Care record.	
Where the client lacks capacity, for another individual to formally act on behalf of the client in My Aged Care, the person must be confirmed as an authorised representative in My Aged Care. See My Aged Care - Representatives and My Aged Care Fact Sheet - Confirming Representatives in My Aged Care for more details regarding representatives and representatives in My Aged Care.	
Script to be read	
In giving your consent for me, acting on behalf of my assessment organisation, to check the type of aged care assessment you require, you understand that:	
The assessment organisation will collect information that allows them to confirm whether you need a home support or comprehensive assessment	
<ul> <li>The assessment organisation will collect personal information about you, such as your name and address, and information about your basits and are needs</li> </ul>	
<ul> <li>The information you provide will be recorded in your My Aged Care client record.</li> <li>If you provide the assessment organisation with personal information about other people such as your family or your support person, they will assume that you have the other person's consent. Information about these other people will be included in your My Aged Care client record.</li> </ul>	
<ul> <li>The information you provide may also be recorded in the assessment organisation's IT systems.</li> <li>The assessment organisation may share your personal information with other organisations to manage the support you need, for example, the Department of Health and Aged Care, and aged care or health providers.</li> <li>As we go through the process, please tell me if you do not want any of your information to be recorded. We can discuss how to manage</li> </ul>	
<ul> <li>this further.</li> <li>You can change your mind and withdraw your consent to participate in the process at any time. However, this will mean the assessment organisation cannot conduct your aged care assessment. You will need to arrange your own aged care services.</li> <li>You can view the My Aged Care privacy policy on the My Aged Care website at myagedcare gov.au for more information on how we</li> </ul>	
handle your personal information. • Do we have your consent to confirm whether Olliver Lew needs a home support or comprehensive assessment?	
	1
consent Obtained From "	I
	1
CONTINUE	

If the client or their representatives choose to not give consent, <u>the triage process is to end</u>. The Triage Delegate is required to provide a reason for refusal. Options provided will be;

• The assessment is no longer required

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- Client's support person is not available
- Client does not have the capacity to understand and communication consent
- Client's representative withdraws consent
- Client's representative not available to give consent, or,
- Other reasons that can be specified further in a free text format.

Please note that the use of the 'Other, please specify' value should be limited to rare and unusual situations that are not captured by existing values.

Once a reason for not providing consent is given, select SAVE AND CLOSE.

Consent for Triage	\$
Please select a reason for not providing the consent	•
<ul> <li>assessment.</li> <li>The assessment organisation will collect personal information about you, such as your name and address, and information about your health and care needs.</li> <li>The information you provide will be recorded in your My Aged Care client record.</li> <li>If you provide the assessment organisation with personal information about these other people such as your family or your support person, they will assume that you have the other person's consent. Information about these other people will be included in your My Aged Care client record.</li> <li>The information you provide may also be recorded in the assessment organisation's IT systems.</li> <li>The assessment organisation may share your personal information with other organisations to manage the support you need, for example, the Department of Health and Aged Care, and aged care or health providers.</li> <li>As we go through the process, please tell me if you do not want any of your information to be recorded. We can discuss how to manage this further.</li> <li>You can change your mind and withdraw your consent to participate in the process at any time. However, this will mean the assessment organisation cannot conduct your aged care assessment. You will need to arrange your own aged care services.</li> <li>You can view the My Aged Care privacy policy on the My Aged Care website at myagedcare. gov. au for more information on how we handle your personal information.</li> <li>Do we have your consent to confirm whether Olliver Lew needs a home support or comprehensive assessment?</li> </ul>	
Consent was not given -	
Please select a reason for not providing the consent * Please select a reason for not providing the consent	
Please select a reason for not providing the consent	
Please be advised that without capturing the consent, you cannot proceed any further with the Triage. If sure, then select 'Save and Close'. This will reject the referral.	•
SAVE AND CLOSE CANCEL	

# **Triage Pre-population options**

Triage Delegates will have the option to pre-populate responses from the clients previously finalised assessment.

 Select the COMFIRM PRE-POPULATION button to pre-populate the relevant previous screening/assessment. Select the BLANK TRIAGE button to begin the triage without prepopulated responses. Selecting the CANCEL button will navigate the Triage Delegate back to the expanded view.

<u>Note:</u> In exceptional cases when the client's previous referral was rejected after triage was completed, the Triage Delegate will only be able to complete the triage with the pre-populated rejected referral.

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Pre-populate or start a blank triage	¢
By selecting 'Confirm Pre-population' the new Triage will be pre-populated with answers from the Home Support Assessment completed on 6 December 2022. Please select 'Blank Triage' if you want to start the new triage with no pre-population. Note that you will not be able to select to pre-populate the new triage after a blank triage has been created.	
CONFIRM PRE-POPULATION BLANK TRIAGE CANCEL	]

2. The Triage Delegate will confirm the demographic details of the client. Once confirmed, to progress select SAVE AND CONTINUE TO TRIAGE.

		U
Does the client identify as an Aboriginal or Torres Strait Islander?		<b>▲</b> JE
ndigenous origin:		
No - Neither     No. Abstissed		Z
) Yes - Torres Strait Islander		ge
○ Yes - Both		late
Not stated/inadequately desc		1011
		18
Does the client prefer a First Nations Assessment Organisation for their assessment?		-
Preferred language *		
English		
/larital status *		
Accommodation type *		Z
ndependent Living		• ige
long with a		late
Nith partner		
Government ID references		1
Department of Veterans' Affairs (DVA) card number		
		-
		Ť
	SAVE AND CONTINUE TO TRIAGE CANC	
		•

- **3.** Follow the prompts for the pre-populated or blank triage. All mandatory questions must be answered before completing triage by selecting **COMPLETE TRIAGE** button.
- 4. Triage Delegates will be required to respond to the question What type of needs assessor is recommended for client assessment. The Triage Delegate will be provided with the options of Clinical, Non-clinical and not eligible for assessment. The option that is selected will display in the portal showing:
  - Comprehensive (clinical) assessment required
  - Home Support (non-clinical) assessment required
  - Not eligible for an aged care assessment.

Advice for assessment	
What type of assessor is recommended for client assessment? *       Clinical     Non-Clinical       Not eligible for assessment	

<u>Please note</u>: The **COMPLETE TRIAGE** button will be disabled until all mandatory questions have been answered in the triage.

5. To save the recorded information but not complete the triage select the **SAVE TRIAGE** button.

If the triage needs to be cancelled, select the **CANCEL TRIAGE – NO FURTHER ACTION REQUIRED** button. The reason for cancellation must be provided by the Triage Delegate. A list of options will be provided under **Reason for ending the triage**. Once the cancelation has been confirmed the referral will be rejected and the Triage Delegate will be navigated back to the client summary page.

Mrs Olliver Meghann LEW	
	1 / 500
	Priority of assessment * Low Medium High
	Outcome/advice for assessment notes *
	17.300
	COMPLETE TRAGE   SAVE TRAGE   CANCEL TRAGE - NO FURTHER ACTION REQUIRED

6. Once **COMPLETE TRIAGE** has been selected, a pop up will confirm that you would like to complete the triage. Select **COMPLETE TRIAGE** to finalise.

ori L	Complete Triage
tcc	Once you select 'Complete Triage', you cannot modify any of the responses in this questionnaire. If sure, then please select 'Complete Triage', otherwise select 'Take me back to Triage'.
	COMPLETE TRIAGE TAKE ME BACK TO TRIAGE

Once the triage is completed, the Triage Delegate will be able to view the follow buttons on the client card;

- Assign to assessor
- Refer urgent services
- Convert to home support assessment or comprehensive assessment.
- Reject
- Transfer
- View full client record
- View client report.

The client card will also display the date that the triage was completed.

Once the client's triage has been completed, the referral for that client will remain under **the Triage pending** tab, under the **Triage Completed** heading.

# Home   Assessment Referrals			
Triage pending			
Incoming referrals Triage pending Ac	cepted referrals Referral history		
Filter by			
T neor by			
Last name		First name	Assigned to Assigned to reference and the second se
ADVANCED SEARCH CLEAR FILTER	RS		
Assigned to is Assigned to me			
FILTER CLEAR			
Sort Refemals by: Accepted Date	in order of Earliest to Latest GO		
Current sort order is Accepted Date		-	
Time Orientidad			
Triage Completed			
Cinda	0		
MURRT			
✓ MOSMAN, NSW, 2088 Triage conducted by: Ashten Carvalho Inside conducted by: Ashten Carvalho			
Date accepted: 14 December 2022			
Comprehensive	Triage Completed		
▼ Low			

# Viewing triage information

Triage Delegates and Team Leaders can view the clients triage information from the client's summary page. This is done by selecting the magnifying glass icon next to **Home Support Assessment or Comprehensive Assessment**.

	Zula LEMKE		×
	Aged 84 ( 29 July 1939 ), Male	Transferred from Wangaratta ACAS on 7 February 2023 Accepted on 7 February 2023	^
U	Preferences No preference was recorded Assessment details Assessment type Home Support Assessment reason Triage conducted by Garnet Bermudez Support plan Triage Completed	Client story 06/02/2023 After suffering a stroke, the client's balance was badly affected, which made them lose their confidence. They stopped going out to meet friends, spending time at church 23/03/2022 An assessor came to the client's house and developed a support plan to help them achieve their goals.	
	Home Support Assessment Triage Completed	VIEW ALL 10 CLIENT NOTES Comments Cohabitant details Precious KANE	

# Referring for urgent services

Triage Delegates can refer a client for urgent services once an assessment referral has been accepted. This can occur before or after triage.

1. To refer urgent services before conducting triage, in the Triage pending tab, the Triage Delegate will select the card for the client they are referring for urgent services. Then select the button REFER TO URGENT SERVICES.

Aged 68 ( 24 October	r 1955 ), Male		Referred from Aged Care Gateway on 19 September 2024 Accepted on 19 September 2024	Î
P <b>references</b> No preference was re	corded		Completed Triage due by 22 September 2024	- 11
Assessment details			Client story	- 8
Assessment type	Comprehensive		Commente	- 81
Assessment reason	the client has needs that exceed a basic programme	support	Comments	- 11
Assessment setting	Non-Hospital			- 81
Friage conducted by	Simon Flower			- 11
Support plan	Triage Completed	٩		- 8
Comprehensive Asse	ssment 🔵 Triage Completed	Q		- JI
atest screening	19 September 2024	Q		- 8
		Ŭ		- 81

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.. •• 2. The Triage Delegate will then be navigated to the Goals & recommendations tab under Support Plan and services.

	ort plan and	d services			
Identified needs	Goals & recommendation	s Manage services & referrals	Associated People	Review	
Client co ADD AREA OF No client concer Other red	oncerns and goa CONCERN Ins or goals. Commendations	als S			
ADD A GENER	AL RECOMMENDATION	DD A SERVICE RECOMMENDATION			
There are no set	rvice recommendations for t	nis client			

When a client has been referred for urgent services, **Urgent Services Pending Triage** will be shown on the client's card.

# **Converting Assessment**

Triage Delegates are able to convert a client's assessment from Comprehensive to Home Support, or Home Support to Comprehensive.

1. Once triage has been completed and based on their clinical judgement, the Triage Delegate can convert the assessment by selecting the CONVERT TO HOME SUPPORT ASSESSMENT or CONVERT TO COMPREHENSIVE ASESSESSMENT.

erences				
eference was recor	ded		Completed Triage due by 22 September 2024 Client story	
ssment type Co	omprehensive		No client story was recorded	
ssment reason the pro	e client has needs that exceed a ba ogramme	sic support	Comments	
ssment setting No	on-Hospital			
e conducted by Sir	mon Flower			
ort plan prehensive Assessm t screening	<ul> <li>Triage Completed</li> <li>Triage Completed</li> <li>19 September 2024</li> </ul>	@ @		

2. When converting from a Comprehensive Assessment to a Home Support Assessment, Triage Delegate will need to enter the **Reason for change** as being **Low level care needs**.

Convert to home support assessment	×
You are about to convert the assessment type from Comprehensive to Home Support for Kim JOLLEY. Assessments should only be converted if the client's needs can be met by the level of care that can be provided through Home Support assessments (e.g. home support services). Are you sure you want to proceed?	
All fields marked with an asterisk (*) are required.          Reason for change *         Low level care needs	
Reason or comments: *	
0 / 255 YES, CONVERT ASSESSMENT NO, CANCEL	]

When converting from a Home Support Assessment to a Comprehensive Assessment, Triage Delegates will need to enter the **Reason for change** as being **High level care needs**.

× Convert to comprehensive assessment
You are about to convert the assessment type from Home Support to Comprehensive for Paris SILVER. Assessments should only be converted if the client's needs exceed the level of care that can be provided through Home Support assessments (i.e., Home support services). Are you sure you want to proceed?
All fields marked with an asterisk (*) are required.          Reason for change *         High level care needs
Reason or comments: *
0 / 255 YES, CONVERT ASSESSMENT NO, CANCEL

# Assigning an assessment referral to an assessor

Before a Triage Delegate assigns an assessment referral to an assessor, triage must be completed.

...

• •

 Referrals that can be assigned are located in the Triage pending tab, under the Triage Completed heading. Expand the client card for the referral you wish to assign, select ASSIGN TO ASSESSOR.

ning referrais Triage pending Accepted referrais \$	Referral history		
Filter by	Zula LEMKE		×
Last name	Assessment reason And on I went though the dogs were spent and the grub was getting low 423/674461 And he grub was getting low 423/674461	23/03/2022	0
ADMINICED SEARCH CLEAR FILTERS Assigned to is Assigned to me FILTER CLEAR	sunit Triage conducted by Garnet Bermudez Support plan Triage Completed ( Home Support Assessment Triage Completed (	The plan included a home maintenance service provider, who suggested ways to make their garden safer and easier to maintain. They introduced a short ramp so the client would have safe access outside their home VEWALL TO CLENT NOTES	
Reference To Septed Date • Earliest to Latest rrent sort order is Accepted Date		Comments Cohabitant details Precious KANE	
riage Completed	MEW FULL CUENT RECORD         Development           ASSIGN TO ASSESSOR         REFER URGENT SERVICES         REJE	cr	

2. The Triage Delegate can Change assessment priority before assigning the referral. Respond Yes or No to the question Assign now, if you wish to assign now, and then choose the assessor. To proceed select ASSIGN. If you do not wish to assign now, this referral will remain under the Triage pending tab, under the Triage Completed heading.

Change assessment priority? ?			Î
Low			
Home Support Assessmen	t, currently unassigned.		_
Assian now ? • Yes	No		
Assign to: *			
Christel DAMICO	(0 assessments assigned)		
O Sophia HENDRICK	(0 assessments assigned)		
C Kylar HINSON	(0 assessments assigned)		
C Roderick ISLAS	(0 assessments assigned)		
C Kama JOSEPH	(0 assessments assigned)		
C Finn PICARD	(0 assessments assigned)		
Dagmar RADER	(0 assessments assigned)		
Keven RFA	(0 assessments assigned)		
Abbey REDMAN	(0 assessments assigned)		
Myrtle SANDBERG	(0 assessments assigned)		
C Karma WAITERS	(0 assessments assigned)		
Garnet BERMUDEZ	(1 assessment assigned)		
Sammy HERMANN	(1 assessment assigned)		
D Lesley MATTOX	(1 assessment assigned)		
) Jake JADE	(2 assessments assigned)		
) Shani LEWIS	(2 assessments assigned)		
Dannette I UONG	(2 assessments assigned)		
Anitra HORNING	(4 assessments assigned)		
D Letitia LOFTON	(4 assessments assigned)		
D Mylo MEDLIN	(4 assessments assigned)		
O Soledad PENA	(4 assessments assigned)		
Cathie LEUNG	(5 assessments assigned)		
Destin PAULINO	(6 assessments assigned)		
C Elegande DECK	(F accomments assigned)		
	ASSESSOR		
SEARCH FOR A SPECIFIC	ASSESSOR		



3. The assessment referral will appear in the **Accepted referrals** list, under the name of the assessor the referral was assigned to. The referral will also appear in the assigned assessor's **Current assessments** list for action.

Acce	pted referrals
Incoming referrals	Triage pending Accepted referrals Referral history
Filter by	
Sort Referrals by: Priority	in order of High to Low GO
Current sort order	r is Priority
Name o	fassessor
	$\odot$
Zula LEMKE	
✓ WODONGA	s, VIC, 3690
Aged care user Date accepted:	r ID: AC38807822 .7 February 2023
Completed Sup	pport Plan: 7 February 2023
Home Sup	pport A 470 days overdue
Triage Complete	ed 🗸 🗸 Low

# Unassigning or reassigning an assessment referral

Team Leaders can unassign an assessment referral and reassign the referral to another assessor in the same outlet. There is no limit on the number of times referrals can be unassigned or reassigned.

1. From the **Accepted referrals** tab, access the expanded referral view by selecting the arrow on the client card.

coming referrals Triage pending Accepted referrals Referral history	
Filter by	
Sort Referrats by: in order of Priority	
Name of assessor	
Zula LEMKE VODONGA, VIC, 3690 Aged care user ID: AC36807622 Date accepted: 7 February 2023 Completed Support Plan: 7 February 2023	

2. Select **REASSIGN**. If using list view, select **REASSIGN** from the expanded view.

anning reserves		Y			
Filter by		Brenna SINCLAIR			×
Hillehman by Hanty : urrent sort order is Priority Garnet Bermudez Brenns SINCLAIR VEST WODONGA, VIC, 3994 Aged care state (2) Date socoketo & Portuary 2023	• High fa Low	Assessment details Assessment faile Assessment reason Home Support Assesso Garnet Bermudez Trage conducted by Garnet Bermudez Home Support Assessment  In Progress Latest screening 31 October 2022	۹	07/02/023 An assessor came to the client's ho developed a support plan to help their goals. 03/11/2022 Client in good spirits, cooked for the VRXALL SCUERT NOTES Comments	we and nem achieve  we achie

3. Select the assessor that the referral is being assigned to and select **SAVE**. If the referral is going to be unassigned and added back to the queue, select **Unassign and add to the queue**.

Wiy Dashbuaru	referrals requests	Assessments Neview.		provider	Doformale	app A	
D: 4-:	f l f D		_			×	
e-assign thi	s reterral for Bre	enna sinciai	r				
Sophia HENDRICK	(0 assessments assigned)						
D Rylar HINSON	(0 assessments assigned)						
O Roderick ISLAS	(0 assessments assigned)						
O Kama JUSEPH	(U assessments assigned)						
C Lesley MATTOX	(U assessments assigned)						
O Finn PICARD	(0 assessments assigned)						
O Dagmar RADER	(0 assessments assigned)						
O Keven REA	(0 assessments assigned)						
O Abbey REDMAN	(0 assessments assigned)						
O Myrtie SANDBERG	(U assessments assigned)						
O Karma WAITERS	(U assessments assigned)						
O Sammy HERMANN	(1 assessment assigned)						
O Jake JADE	(2 assessments assigned)						
O Shani LEWIS	(2 assessments assigned)						
O Dannette LUONG	(2 assessments assigned)						
Anitra HORNING	(4 assessments assigned)						
O Letitia LOFTON	(4 assessments assigned)						
O Mylo MEDLIN	(4 assessments assigned)						
O Soledad PENA	(4 assessments assigned)						
O Cathie LEUNG	(5 assessments assigned)						
O Destin PAULINO	(6 assessments assigned)						
O Eleazar PECK	(6 assessments assigned)						
O Margie LUCAS	(7 assessments assigned)						
O Evelina MATHIAS	(8 assessments assigned)						
O Lyndon HINSON	(9 assessments assigned)						
O Lyndon SAMS	(11 assessments assigned)						
O Lucia MEDLEY	(12 assessments assigned)						
O Clotilde PENNINGTON	(13 assessments assigned)						
O Monserrate SALINAS	(17 assessments assigned)						
O Nadia SCHENK	(48 assessments assigned)						
<ul> <li>Unassign and add to the qu</li> </ul>	ieue						
SEARCH FOR A SPECIFIC ASS	ESSOB						
						· · ·	
					SAVE	CANCEL	
					SAVE	CANCEL	
Jonas		Prisc	illa			Tn	161

If reassigned, the assessment referral will appear under the relevant assessor in the list of **Accepted referrals**.

			Currently viewing Northern Sydney LHD
accoming referrals Triage pending Accepted referrals	Referral history		
			CARD
Filter by			0
Son Referrals by: in order of Last Manna Abshahatiral (A.7)	GO		
			61 to 72 out of 72 matching result
Ellie Winkler			
Ellie Winkler	0	0	Ø
Lynelle ANTHONY	(2) Lyn ROSEN	© Catherine TILLEY	Farah PERRYMAN
Ellie Winkler	Lyn     ROSEN     V EELROSE, NSW, 2005     V EELROSE, NSW, 2005	Catherine     Catherine     TILLEY     PRENCHS FOREST INSW. 2006     Anderson water ID, ACRESSEA	Earth     PERRYMAN     • SEAFORTH NSW 2002     Made consumption     AddBM2702
Ellie Winkler Lynelie ANTHONY	Lyn ROSEN      P EELROSE, I/SW 2085      Aged cast user ID: AC05157791      Date accepted: 27 February 2023      Pred Charlos Intervention: 24 Mach 2023	Catherine TILLEY • FRENCHS FOREST NSW, 2006 Aged care user ID: AC36205864 Date accepter: 15 February 2023 Find Clinical Intervention: TU March 2023	Farah PERRYMAN • SEAFORTH, NSW 2002 Aged care user ID: AC68447832 Date accepted: 13 February 2023 Fraid Citade Intervention. 10 Nachet 2023
Ellie Winkler	C     ELROSE, NSW, 2085     Aged care user ID: Acc1517791 Dbb acc050052 27 February 2023 Pirst Clinical Intervention: 24 March 2023     Comprehensive     Comprehensive     Comprehensive     Care Comprehensive	Catherine     TILLEY      P FRENCHS FOREST NSW. 2006 Apd Care user 10. ACX203554 Deteopdet: 15 February 2023 First Clancel Intervention: 12 March 2023      Every Comprehensive     Add days overdue	Farah     PERRYMAN      SEAFORTH, NSW 2002     Aged care user 10: ACG467782     Date accepted. 19: Fedbaugr 2023     First Clinical Intervention: 10 March 2023      First Clinical Intervention: 10 March 2023      Comprehensive     A 45 days overdue

If unassigned, the referral will appear under Unassigned in the list of Accepted Referrals.

Accepted referrals Currently Viewing Northern Sydney LHD ACA							
Incoming referrals Triage pending Accepted referrals Referral his	story						
			CARD IN LIST				
Filter by			0				
Bort Refermals by: Last Name • Alphabetical (A-Z)	<b>GO</b>						
			61 to 72 out of 72 matching results				
Unassigned							
⊘ Betty BALL	Cinda MURRY	Tommie HEFNER	⊘ DATASIX				
Vesley Hospial KOGARAH, ISW, 2217 Aged care user ID AC72807274 Data accepted: 21 May 2024 Completed Support Plan: 30 June 2024	✓ MOSMAN, NSW, 2088 Aged care user (D. AC61565487 Date accepted: 14 December 2022 Completed Support Plan: 23 January 2023	CASTLE HILL, NSW 2154     Aped care user ID: AC44228971     Date accepted: 15 December 2022     Completed Support Plan: 24 January 2023	MILSONS POINT, NSW, 2061 Aprid care user ID: AC01379428 Date accepted: 22 March 2023				
Comprehensive	Comprehensive A 491 days overdue	Comprehensive A90 days overdue	Comprehensive				
Triage Completed Volume Low	Triage Completed Volume Low	Triage Completed V Low	Delegate Decision     Complete     Medium				

# Rejecting an assessment referral

If an outlet is unable to accept an assessment referral and cannot transfer it, a Team Leader can reject the referral. Referrals may also be rejected after acceptance, but only before the assessment has commenced.

1. Select **REJECT** on the expanded card view of the referral information.

John DOOR		
Male	Referred from Aged Care Gateway on 9 October 2024	
Preferences No preference was recorded	Action Referral due by 12 October 2024	
Assessment details	Client story	
Assessment type Comprehensive	Comments	
Assessment reason Seit-reterral Assessment setting Non-Hospital		
	REPORT	
ACCEPT REJECT TRANSFER		
	•	

- 2. Enter a reason for rejecting the assessment referral, and then select **REJECT**. The rejected referral will automatically be sent to My Aged Care to action.
  - ! The use of the 'Other' value when rejecting referrals should be limited to rare and unusual situations that are not captured by existing values. If an existing value primarily captures the nature of the rejection reason, please utilise that option. The free text field will be available for further information for any rejection reason selected.

•    īri	Reject this referral for John Door	×
F F F	Select a reason:* Client/family/rep unavailable Duplicate Client Record Interpreter not available Unable to contact client Outside assessment region Assessment no longer required Care approval meets needs Client medically unstable Client age - alternate options Client does not consent Client deceased Clinical staff not available Client prefers an FNAO Hospital assessment required Client prefer later assessment Ineligible at Triage Other	0
er en	Rejection reason:	20
ent ent	REJECT	

! An older Aboriginal and/or Torres Strait Islander person should not be rejected based on a client's preference (e.g. under the reason 'Client prefers an FNAO") unless it is a last resort. A transfer prior to the assessment is preferable to a rejection. For more information please refer to the My Aged Care Assessment Manual.

## Rejecting an assessment with the reason of Client deceased

! Rejecting an assessment with the reason of Client deceased will change the client's status to Deceased and make the client record read-only. Any unaccepted service referrals will be recalled, services in place will be ceased, assessments will be cancelled and the client's access to the client portal will be revoked. My Aged Care will not send correspondence to the client or their representatives after the status is changed to Deceased.

Where a client is active in the national priority system or has been assigned a Home Care Package, this will remove the client from the national priority system and withdraw any assigned Home Care Packages.

If a client is deceased during an assessment referral period, Team leaders will need to provide the following information:

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

When a client is marked as deceased, a notification will be sent to the client's associated assessor and provider, telling them to close or finalise any in-progress tasks.

Reject this referral for Billy Road	×
Select a reason:"	
C Client/family/rep unavailable	
O Duplicate Client Record	
Interpreter not available	
O Unable to contact client	
O Outside assessment region	
Assessment no longer required	
Care approval meets needs	
C Client medically unstable	
Client age - alternate options	
O Client does not consent	
Client deceased	
Culinical statt not available	
Prefer Indigenous assess org	
O Hospital assessment required	
<ul> <li>Client prefer later assessment</li> </ul>	
O Ineligible at Triage	
O Other	
You are about to notify the department that Billy Road has passed away. Their record will become read only. You will still be able to finalise outstanding assessments and support plan reviews, and add notes and attachments.	
Please supply the following information:	
Who, when and how were you informed that this person is deceased?*	
0 / 500	
0,000	
Date of death (if known)	
dalhim/yyyy	
Add Attachments	
You can upload files up to 5 MB to this record. The following file types are accepted: jpeg.jog.omp.eng.docx, xlsx, pdf, rtf, txt (if available)	
🕹 Choose a file	▼
REJECT	EL

When a client is marked as deceased, if they have an in-progress assessment or have commenced services, a notification will be sent to the associated assessor in the assessor portal, advising the assessor to close or finalise the in-progress tasks.

## Transferring an assessment referral to another outlet or organisation

Only incoming, accepted or triaged referrals may be transferred to another outlet or organisation. A referral can only be transferred to another organisation or outlet once.

• To transfer assessment referrals to an alternative assessment organisation or outlet follow the steps below.

- ! Before transferring a referral, the Team leader must ensure that:
  - The client understands why their referral is being transferred and consents to the transfer of the referral to the new assessment organisation
  - They have contacted the assessment organisation that will be receiving the client referral to confirm that they will accept the referral.

A referral should not be transferred before confirmation has been obtained that it will be accepted by the receiving assessment organisation.

1. From either the **Incoming referrals**, **Triage pending** or **Accepted referrals** tab of the **Assessment Referrals** tile, select the arrow next to the client's name and then select **TRANSFER** in the expanded view.

#### CARD view example:

Joel Swift	Lilly FIELD	×
Lilly	Aged 84 ( 17 January 1935 ), Female	Referred from Aged Care Gateway on 14 February 2019 Accepted on 14 February 2019
FIÉLD	Preferences No preference was recorded	Finalised Support Plan due by: 28 February 2019
DOWNER, ACT, 2602     Aged care user ID: AC65143935     Date accepted: 6 February 2019     Finalised Support Plan: 20 February 2019	Assessment details Assessment type Home Support Assessment reason the client is eligible for CHSP Latest screening 14 February 2019	Client story No client story was recorded
Home Support Due today	VIEW FULL CLIENT RECORD	CORD
X Assessment - Medium	REASSIGN REJECT TRANSFER	

## LIST view example:

1

File	ELD Lilly	AC65143935	DOWNER, ACT, 2602	19/02/2019	Not Started (Finalised Support Plan)	05/03/2019	Joel Swift	🔴 Medium
	Aged 84 ( 17 Februa	ry 1935 ), Female	Referred Accepted	from Aged Care Gat I on 19 February 201	eway on 19 February 2019 9			
	Preferences	ecorded	Finalised	d Support Plan due	by: 5 March 2019			
	Assessment details Assessment type Assessment reason	s Home Support the client is eligible for CHSP	Client st No client	ory story was recorded				
	Latest screening	19 February 2019	۹					
	REASSIGN RE	JECT TRANSFER	ENT RECORD					

The following warning will appear when you select **TRANSFER**.

Before you transfer, contact the Assessment Organisation you want to refer the client to. Please provide as much information as possible in the comments box below to assist the receiving organisation. Please note, a referral can only be transferred once. Please ensure that you have client consent for assessment type before transferring.

2. In the pop-up box the type of assessment required must be selected from a drop-down list, either **Home Support** or **Comprehensive Assessment**. If you select Comprehensive

Assessment, it will provide an Assessment setting of **Hospital** or **Non-Hospital**. Once these have been selected, select the button **ADD ADDRESS** to search the address.

A Home   Assessment Referrals   Transfer	
Transfer this referral for Billy Road	
All fields marked with an asterisk (*) are required.	
What type of assessment does the client require? * Comprehensive Assessment	
Assessment setting: ? Hospital Non-Hospital	
Search for Assessment Organisation: *	
Use the client's address (No address provided)   Enter a Hospital address ADD ADDRESS	
SEARCH TRANSFER CANCEL	

 A pop up will appear and address details of the Clients address, or the Hospital Address will need to be entered. Select VALADATE THIS ADDRESS. Below a list of addresses will be provided, select the most relevant address. To finalise the address, select SAVE ADDRESS.

		<b>~</b>		
Add address				
Il fields marked with an asterisk (*) are required.				
lospital outlet name (Building name) * IOSPITAL				
treet number e.g. 201 or 34-38 Street name HOSPITAL		H.		
treet type Prescent		U.		
nter Suburb and postcode and select from the list below * DEAKIN, ACT, 2600		U.		
SUBURB IS NOT LISTED, CLICK HERE				
ountry* uustralia		Ш.		
VALIDATE THIS ADDRESS				
bid you mean				
ore than 10 results, please refine search ) Not found, use entered address anyway: DEAKIN ACT 2600				
pecial instructions (up to 100 characters)				
	SAVE ADDRESS CANCEL			
		•		

4. Select the appropriate assessment organisation for referral transfer and then select the reason from the drop-down menu.

Transfer this referral for Lilly FIELD	
All fields marked with an asterisk (*) must be completed before submission	
What type of assessment does the client require? * Comprehensive Assessment	$\mathbf{\tilde{z}}$
Assessment setting: (?)	
Hospital     Non-Hospital	
Search for Assessment Organisation: *	
Client address o ann people T part DI AID ATHOL SA 5024	
<ul> <li>Enter an alternative assessment address</li> </ul>	
SEARCH	
Select Assessment Organisation * O Northern Adelaide ACAT, MODBURY, Ph 02 5201 0347	
Select a reason for transfering this client * ?	×
Comments:	
TRANSFER CANCEL	0 / 255
Select a reason for transfering this client *  Select one	•
Select one	
Insufficient capacity	
Outside assessment org region	
Client change in circumstances	i
Remote Assessment	
Clinical staff not available	
ce Other	

5. Provide as much detail as possible about the reason for transferring the referral in the comments box to assist the receiving organisation and then select **TRANSFER**.

•

••••

rc	ansfer this referral for Collin Braddington
A	Il fields marked with an asterisk (*) must be completed before submission
0	Abst type of assessment does the client require? * Comprehensive Assessment
Α	ssessment setting: 🝞
C	) Hospital
0	Non-Hospital
s	earch for Assessment Organisation: *
C	) Use the client's address
	Client address
C	5 SECOND Avenue Assessmultate VIC 3195     Enter an alternative assessment address
0	Enter a suburb/postcode
	Enter suburb or postcode and select from the list below: DONCASTER EAST, VIC, 3109
S	SEARCH select Assessment Organisation * O Central East ACAS, FOREST HILL, Ph 02 9606 3000
5	elect a reason for transfering this client * 🍞 Other
C A ci	omments.* is discussed, this client has requested to be assessed by Central East ACAS based on a previous experience with a family member. The current lient address is temporary and subject to change.
	TRANSFER CANCEL
	Desis Dender, Deferral has been transferred eucosofully

# Client records from inactive outlets

Departmental staff can transfer client records linked to an inactive outlet to an active outlet in the same assessment organisation, or to another assessment organisation.

Future Support Plan Review requests or new assessment referrals will be issued to the active outlet. Care extension requests transferred to the active outlet will appear as 'unassigned' in the delegate queue.

The assessors and the contact centre will see a note of the transfer in the My Aged Care client record. The client's online account includes a notification of the transfer.

In the assessor portal, the notification of the transfer can be seen in the **Notes** tab of the client record.

ome   Find a client   Activectient INI	JKANSW													
tiveclient INDRANS 10, 78 years old, 1 July 1945, AC8072 DRNA LIPPMANN LANE BONNER, AC	W 7811 CT, 2914							Primary contact: Acti No support relations?	eclient IndraNsw (si os recorded	et)				
Notes lient summary Client details S	upport network A	Approvals Plans	Atlachments	Services	My Aged Care int	leractions No	Tasks and Notifi	ations Residents	Funding Classifica	ions		REFER THIS CLIENT FOR ASSES	ISMENT 🕒 VIEW CI	LIENT REPO
Filter by	• 60													$\odot$
Filter by Softy: Please select ADD ANOTE Date created End date	GO Note type	Description									Created by organisation	Created by outlet	Note status	$\odot$
Filter by For the select ACCO ANOTE Date created End date 11/12/2023	GO GO Note type Referral Note	Description This client record	has now been tra	ansferred from I	ndra Combined As	isessment to Indr	ra Combineone Assessm	ent on 11/12/2023.			Created by organisation System	Created by outlet System	Note status Active	
Filter by           wity: Masse select           ADD A NOTE           Date created         End date           11/12/02/3         6/11/12/02/3	CO Note hype Referral Note Other	Description This client record waddas	has now been tra	ansferred from I	ndra Combined As	isessment to indr	ra Combineone Assessm	ant on 11/12/2023.			Created by organisation System System	Created by outliet System System	Note status Active Active	0
Filter by With Yease select Cale Created Cal	O     Note type     Referral Note     Other     Other	Description This client record waddas dfsflds	has now been tra	ansferred from I	ndra Combined As	isessment to Indr	ra Combineone Assessm	ent on 11/12/2023.			Created by organization System System System	Created by outlet System System System	Note status Active Active Active	
Date creation         End of the creation           ACCO ANOTE:	© OO Note type Referral Note Other Other Other	Description This client record waddas dfsffds asddsa	has now been tra	ansferred from I	ndra Combined As	sessment to Indr	ra Combineone Assessm	ant on 11/12/2023.			Cinaled by organization System System System System	Created by outlet System System System System	Note status Active Active Active Active	

# **Residential Funding Referrals**

The Residential Funding Referrals tile is available to accept any residential funding referrals.

1800 836 799 Mon-Fri 8am - 8pm Sat 10am - 2 Assessor Portal	pm		Welcome Tis
Wolcomo Tisha			
at d	Residential Funding Referrals	Find a service provider	Reports and documents
	<u> </u>	Ś	i,=)
My Dashboard	Aged Care Assessor app	Tasks and notifications	My Aged Care interactions

A clinical aged care needs assessor (clinical needs assessor) will have access to the **Current Work** and **Recent Work** tabs.

The Current Work tab contains Residential Respite Assessments that are assigned to you.

Home   Residential Funding Referrals	
Ourrent work	Currently viewing Community Options ACT Limited
Current work Recent work	
Filter by	0
Son by Last Name • Alphabelical (A-Z)	ω
Current sort order is Last Name	1 to 34 out of 34 matching results
MVE:ve ABDULLAH Aged 69, (20 October 1942), Male	
Aged care user ID: AC43927532 Care type: Residential Reppte Date issued: 1 November 2022	
Set5-referral	

The **Recent Work** tile contains Residential Respite Assessments that you have completed in the past 2 years.

				Currently viewing Community Options AC	T Limited
Recent work					` .
					JST
1				(	0
is units of					
Alphabetical (A-Z)      v	00				
				1 to 50 out of 117 matching n	esuita
		0	AUTOHMcGlynn	MVEve	
ON agust 2020), Fernale	AUTOVBONITA Aged 78, (16 September 1944), Mate		AUTOVNICHOLAS Aged 77, (19 January 1945), Male	ABDULLAH Aged 80, (29 October 1942), Male	
r ID. AC03536158 sidential Respite	Aged care user ID: AC93767101 Care type: Residential Respite		Aged care user ID: AC39986872 Care type: Residential Respte	Aged care user ID: AC43927532 Care type: Residential Respte	
September 2022	Date closed: 9 September 2022		Date closed: 15 September 2022	Date closed: 1 November 2022	
X Rejected - Transferred		✓ Finalised	✓ Finalised	✔ Fnaised	
	0	0			
AN Jugust 1942), Male	BEIER Aged 80, (27 October 1942), Male				
r ID. AC04414546	Aged care user ID: AC34364109				
soensa kespee 9 September 2022	Care type: Hesidential Respite Date closed: 17 October 2022				
- Finalized		X Rejected - Entered a residential facility			

Filters can be applied to both the Current and Recent work tabs.

				Currently viewing Community Options ACT Limited
		Ļ		CARD LIST
Filter by				0
First name	Last name	Aged Ci	are user ID	
ADVINCED SEARCH CLEAR FILTERS				
Sort by: Last Name • Alphabetical (A-Z)	• 60			
Current sort order is Last Name				1 to 50 out of 117 matching results

For more information on self-referring a client and starting a Residential Respite Assessment, please refer to the <u>Aged Care Assessor Application User Guide</u>.

# Support Plan Reviews

! When a new assessment is raised for a client, the assessment referral will be required to undergo triage. This includes new assessments which have resulted from a Support Plan Review where it has been identified that the client's needs have changed to the point of needing a new assessment.

Team leaders can manage Support Plan Reviews via the **Review requests** tile on the assessor portal home page.

1800 836 799 Mon-Fri 8am - 8pm Sat 10am - 2pm	ř.	Welcome Arlen
Assessor Portal		Logo
Welcome Arlene		
Lut	Find a client	Assessment referrats
My Dashboard	Review requests	Crganisation administration
		Ś
Find a service provider	Reports and documents	Tasks and notifications

In the **Review requests** section, team leaders can view **Upcoming reviews**, **Assigned reviews** and **Review history**.

•



In the Upcoming reviews tab team leaders can:

- View scheduled reviews
- View reviews requested by service providers
- Assign reviews to assessors
- Change review priority
- Cancel reviews.

In the Assigned reviews tab team leaders can reassign reviews to different assessors.

In the **Review history** tab team leaders can view a history of completed and cancelled reviews.

## **Viewing Support Plan Reviews**

A Support Plan Review request will contain the following information:

- The person/organisation requesting the Support Plan Review
- The assessor who last conducted the assessment
- Reasons for request including:
  - Client's change in circumstances
  - o Impact on client's needs
  - o Primary reason for request
  - o Services client is currently receiving
  - Options explored to increase the client's current support.

A banner will be displayed on the request if additional attachments have been added to the client's record as part of the Support Plan Review request.

Upcoming reviews Upcoming reviews Assigned reviews Review history			
Filter by			×
Sont Reviews by: Scheduled Date Earliest to Latest	Jacquelyne MATSON		
Current sort order is Scheduled Date	Aged 87 (31 July 1936), Female Requested by Representative	Reason for request Clients change in circumstances:	
Jacquelyne MATSON	Contact Eldon Cronin 02 4712 1288 Request submitted by: Farah Moy	Change in care needs impact on client's needs: She is 85 years old. She has a hep replacement and she need some assistance with domestics assistance	Beck
WEST WODONGA, VIC, 3690     Aged care user ID: AC05627757     Requested review date: 1 March 2023	Client last assessed by: Dagmar Rader ASSIGN REVIEW CANCEL REVIEW TRANSFER REVIEW	VIEW FUIL CLIENT RECORD VIEW ALL CLIENT NOTES	WOD ged car tequest

If the client has pending support relationships, a banner will be displayed on the review. Team leaders are able to confirm pending support relationships for clients, this process is described in <u>My Aged Care – Assessor Portal User Guide 2 – Registering support people</u> and adding relationships.



Team leaders can sort, and filter Support Plan Reviews based on several categories.

Assigned	ed reviev	VS
Upcoming reviews	Assigned reviews	Review history
Filter by		
Sort Reviews by:		in order of
Scheduled Date		Earliest to Latest     GO
Last Name First Name Aged Care User ID Suburb State PostCode Scheduled Date Actual Date Assessment Status Review Status Urgency	:	

# **Assigning a Support Plan Review**

Team leaders will only be able to assign the Support Plan Review request that has the parent assessment type as Home Support assessment then only to non-clinical aged care needs assessors (non-clinical assessor) within the outlet. If the client is undergoing support, the team leader is to contact the assessor to determine whether to end the support period or cancel the review.

Alvin CRAYFORD	
Urgent request Requested: 23 July 2019 Requested action date: 2 August	t 2019
Files were attached to this request <u>View client attachments</u>	
Undergoing reablement	
Requested by Aged Care Service Provider Abbyson Hostel	Reason for request Why is this request urgent? requires urgent attention
Contact Tom Senseney tom.senseny@test.kch.cp	Clients change in circumstances: Risk of vulnerability
Request submitted by: Aged Care Provider	Impact on client's needs: Increasing in care needs
Assessment Status: Undergoing Support	Primary reason for request: Request for additional CHSP services for clients who are in receipt of HCP Clients on Level 1 or 2: where budget is allocated, cleint can access additonal short-term or episodic Allied Health and Therapy or Nursing services from CHSP.
	Services client is currently receiving: Client is currently receiving domestic assistance at home, to support her day to day activites

To assign a Support Plan Review, follow the steps below.

1. Navigate to the **Upcoming reviews** tab and select **ASSIGN REVIEW** on the expanded client card.

Upcoming reviews     Assigned reviews     Review history		
Filter by  Select all  Soft Revew by: Scheduled Date Earliest to Latest	Jacquelyne MATSON	×
Current sort order is Scheduled Date  Jacquelyne MATSON	Aged 87 (31 July 1936), Female Requested by Representative Contact Eldon Cronin 02 4712 1288	Reason for request Clients change in circumstances: Change in care needs Impact on client's needs: She is 85 years old. She has hep replacement and she need some assistance with domestics assistance
WEST WODONGA, VIC, 3690     Aged care user ID:     Requested review date: 1 March 2023	Request submitted by:     Farah Moy       Client last assessed by:     Dagmar Rader       ASSIGN REVIEW     CANCEL REVIEW	FER REVIEW VIEW FULL CLIENT RECORD VIEW ALL CLIENT NOTES

2. Before assigning to an assessor, you can change the Support Plan Review priority. Select an assessor to assign the Support Plan Review to and select **ASSIGN**.

ll fields marked with an a	sterisk (*) are required.	
hange support plan review p	priority?	
ssian to:*		
) Garnet BERMUDEZ	(3 assessments and 0 reviews assigned)	
) Christel DAMICO	(0 assessments and 0 reviews assigned)	
) Sophia HENDRICK	(0 assessments and 1 reviews assigned)	
Sammy HERMANN	(1 assessments and 0 reviews assigned)	
Kylar HINSON	(0 assessments and 0 reviews assigned)	
) Lyndon HINSON	(9 assessments and 0 reviews assigned)	
) Anitra HORNING	(4 assessments and 1 reviews assigned)	
Roderick ISLAS	(0 assessments and 0 reviews assigned)	
) Jake JADE	(2 assessments and 0 reviews assigned)	
) Kama JOSEPH	(0 assessments and 0 reviews assigned)	
) Cathie LEUNG	(5 assessments and 0 reviews assigned)	
) Shani LEWIS	(2 assessments and 1 reviews assigned)	
		ASSIGN

Once assigned, a banner will appear on the bottom of your screen.

You have successfully assigned this review to the assessor.

The Support Plan Review will now appear in the **Assigned reviews** tab. Assigned reviews will also appear in the **Current reviews** tab of the assessor the review was assigned to.

## **Transferring a Support Plan Review**

Team leaders are able to transfer Support Plan Reviews to other assessment organisations.

1. To begin transferring a Support Plan Review, go to **Upcoming reviews** and select the client card you wish to transfer for the Support Plan Review. Select **TRANSFER REVIEW**.

Before making the t box to assist the red	ransfer, please contact the A eiving organisation. Please	Assessment Organisation you want to r note, a review can only be transferred	efer the client to and provide as much information as possible in the comments once. Please ensure that you have client consent before transferring.
	ZIEWS Review history		
Filter by Select all Son Reviews by: Scheduled Date	in order of	Jacquelyne MATSON	I
Current sort order is Scheduled Date Uurrent sort order is Scheduled Date Jacquelyne MATSON		Aged 87 (31 July 1936), Female Reguested by Representative Contact Eidon Corolin 02 4712 1288	Reason for request Clients change in circumstances: Change in care needs Impact on client's needs: She is 85 years old. She has a hep replacement and she need some assistance with domestics assistance
WEST WODONGA, VIC, 3690 Aged care user ID: Requested review date: 1 March 2	123	Request submitted by: Farah Moy Client last assessed by: Dagmar Rader ASSIGN REVIEW CANCEL REVIEW TRAN	FER REVIEW FULL CLIENT RECORD VIEW ALL CLIENT NOTES

2. You will need to enter a **What is the reason for the transfer** and search and select the Assessment Organisation which the Support Plan Review will be transferred to. Once the reason for transfer and organisation has been selected, select **TRANSFER**.

ansfer this support plan review for Jacquelyne Matson Il fields marked with an asterisk (*) are required. hat is the reason for transfer? * ilient has relocated omments: earch for Assessment Organisation: * ) Use the client's address Client address •) Senter an alternative assessment address SEARCH TRANSFER CANCEL	Home   Review Requests   Transfer	
Il fields marked with an asterisk (*) are required.  hat is the reason for transfer?*  client has relocated  omments:  earch for Assessment Organisation: *  Use the client's address Client address Client address  ExercH TRANSFER CANCEL CANCEL	ansfer this support p	olan review for Jacquelyne Matsor
hat is the reason for transfer? * <pre>client has relocated omments: earch for Assessment Organisation: *    Use the client's address    Client address    O    Enter an alternative assessment address SEARCH TRANSFER    CANCEL</pre>	All fields marked with an asterisk (*) are require	ed.
comments: earch for Assessment Organisation: * ) Use the client's address Client address ♀ ) Enter an alternative assessment address SEARCH TRANSFER CANCEL	What is the reason for transfer? *	
earch for Assessment Organisation: *  Use the client's address Client address Client address Client an alternative assessment address SEARCH TRANSFER CANCEL	Client has relocated	
<ul> <li>Use the client's address</li> <li>Client address</li> <li>P</li> <li>Enter an alternative assessment address</li> <li>SEARCH</li> <li>TRANSFER CANCEL</li> </ul>	Search for Accessment Ornanisation: *	
Client address Client address Enter an alternative assessment address SEARCH TRANSFER CANCEL	Use the client's address	
Enter an alternative assessment address SEARCH TRANSFER CANCEL	Client address	
SEARCH TRANSFER CANCEL	•	
SEARCH TRANSFER CANCEL	<ul> <li>Enter an alternative assessment address</li> </ul>	
TRANSFER CANCEL	SEARCH	
	CANCEL	

# **Reassigning a Support Plan Review**

To reassign a Support Plan Review, follow the steps below.

1. From the **Assigned reviews** tab, select **REASSIGN REVIEW** on the Support Plan Review to be reassigned or unassigned.

Assigned reviews     Assigned review     Review history	
Filter by	Ilan TISDALE ×
Scheduled Date   Scheduled Date  In order or Earliest to Latest	Aged 83 (31 July 1940), Female
Current sort order is Scheduled Date	Requested by Reason for request GP Clients change in circumstances: Wodonga Change in care needs
Sophia Hendrick	Contact         Impact on client's needs:           Jonas Madden         25549 8944           Pauline is requesting an aged care assessment for Margaret for services           Saleem. Finn@test offoss.fbk         under the act. The requested approval is for home Care           Paulare is requested approval is for home Care         Paulare is requested services is for home Care
lian TISDALE	Request submitted by: Braeden Kinard reason for this request is because Wants to access respite to the view of possible permanent placements that was still working up until trues Client tast assessed by: Abbey Redman years ago as a Community Adordacy Working and the as on that lives Assigned to: Soonia Hendrick term memory loss and as no environ years ago as a term was all working and the assignment of the advectory for
WEST WODONGA, VIC. 3890     Aged care user ID.     Requested review date: 18 February 2023	had a COVID infection, there was concerned in that she was sealing. Margaret is also dilabetic and takes regular insultin. Concerns with the memory that she may have double dose on medications- particularly insultin- if her memory continues to decline. Very hard to contact on the phone. SMS or letter is best.
Not Starled	REASSIGN REVIEW CANCEL REVIEW CHANGE PRIORITY VIEW FULL CLENT RECORD VIEW ALL CLENT NOTES

2. Select another assessor and **REASSIGN**.

Reassign this review for Lilly Field		×
All fields marked with an asterisk (*) are required.		
Assign to:*		
O Louis MONFORE (0 assessments and 0 reviews assigned)		
Joel SWIFT (3 assessments and 1 reviews assigned)		
	REASSIGN CANCE	EL

The Support Plan Review will now be reassigned to the selected assessor and the review will appear in their **Current reviews** tab.

•

! Team leaders can also reassign Home Care correspondence notifications, by going to Tasks and notifications in the assessor portal homepage and clicking on the HCP Notifications tab. More information on this can be found on <u>My Aged Care - Assessor Portal User Guide 9</u> - Tasks and notifications.

Please select Home Care correspondence notification recipient	
Ashten Carvalho	
○ Jawad Egan	
O Benji English	
○ Shamika Franke	
○ Kenton Gagne	
○ Efren Gatlin	
O Noma Graziano	
O Dominique Guinn	
C Kim Hendrick	
○ Lyn Houle	
O Matthias Hyman	
Rayland Knudson	

# **Cancelling a Support Plan Review**

To cancel a Support Plan Review, follow the steps below.

1. In either the **Upcoming reviews** tab or **Assigned reviews** tab, select **CANCEL REVIEW** from the expanded view of the client card for the review to be cancelled.

IICIN TISDALE Aged 83 (31 July 1940), Female Requested by GP Wordong	Reason for request
Aged 83 (31 July 1940), Female Requested by GP Wodonga	Reason for request
Requested by GP Wodonga	Reason for request
	Change in care needs
Contact Jonas Madden 02 5545 9844 Saleem Finn@test.offoss.fbk Request submitted by: Braeden Kinard Client last assessed by: Abbey Redman Assigned to: Sophia Hendfrick	Impact on client's needs: Pauline is requesting an appd care assessment for Margaret for services under the act. The requested approval is for Home Care PackageResidential care RepstReservational Care Permanent. The reason for this request is because Wants to access respite to the view of possible permanent placement Margaret was situation of the years ago as a Cemmunity Advoccy Worker. Margaret has a son that lives in Wangarata bol unors as a FFO wirker. Margaret has not care to the service of t
Assigned to. Oopina Herturick	had a COVID infection, there was concerns that she was eating. Margaret is also diabetic and takes regular insuin. Concerns with there memory that she may have double dose on medications-particularly insulin- if her memory continues to decline. Very hard to contact on the phone. SMS or letter is best.
R C A	equest submitted by: Braeden Kinard lient last assessed by: Abbey Redman ssigned to: Sophia Hendrick REASSIGN REVIEW CANCEL REVIEW

## 2. Enter a reason for the cancellation and select CANCEL REVIEW REQUEST.

The review will be removed from the Upcoming reviews tab. Completed and cancelled Support Plan Reviews will also appear in the Recent reviews tab of the assessor who completed the review.

Support Plan Reviews will also be cancelled automatically where a new assessment referral is issued and accepted for the client. This will allow the new assessment to commence without requiring the Support Plan Review to be completed.

Cancel this review for Jacquelyne Matson	×
Reason for cancellation *	<u> </u>
Details: *	
	0 / 255
	CANCEL REVIEW REQUEST CANCEL

# Cancelling a Support Plan Review with the reason of Client deceased

! Cancelling a Support Plan Review with the reason of Client deceased will change the client's status to Deceased and make the client record read only. Any unaccepted service referrals will be recalled, services in place will be ceased, assessments will be cancelled and the client's access to the client portal will be revoked. My Aged Care will not send correspondence to the client or their representatives after the status is changed to Deceased. My Aged Care will send a notification to the client's assessor and provider advising them to close or finalise any in-progress items.

Where a client is active in the National Priority System or has been assigned a Home Care Package, this will remove the client from the National Priority System and withdraw any assigned Home Care Packages.

When cancelling a Support Plan Review with the reason of **Client deceased**, you will need to provide the following information:

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

Support Plan Reviews will also be cancelled automatically where a new assessment referral is issued and accepted for the client. This will allow the new assessment to commence without requiring the Support Plan Review to be completed.

Cancel this review for Moses Mehan	>
Reason for cancellation * Client deceased	•
You are about to notify the department that Moses Mehan has passed away. Their record will become read only. You will still be able to finalise outstanding assessments and suppor plan reviews, and add notes and attachments.	t
Please supply the following information:	
Who, when and how were you informed that this person is deceased? * ?	
0/5	<u>//</u> 500
Date of death (if known)	
dd/mm/yyyy	
Add Attachments	
You can upload files up to 5 MB to this record. The following file types are accepted: .jpeg, .jpg, .bmp, .png, .docx, .xlsx, .pdf, .rtf, .txt (if available)	
L Choose a file	
Details: *	
CANCEL REVIEW REQUEST CANCE	L

Notes and attachments can be attached to the client record after the status is set to **Deceased**.

When a client's status is changed to **Deceased**, if they have an in-progress assessment or has commenced services, a notification will be sent to the associated assessor in the assessor portal, advising the assessor to close or finalise the in-progress tasks.

#### Change priority for a Support Plan Review

Team leaders can change the priority of a Support Plan when assigning a review to an assessor in the **Upcoming reviews**.

1. In the **Upcoming reviews** tab, select **ASSIGN REVIEW** from the expanded view of the client card.

oming reviews Assigned reviews Review history					
Filter by	Jacquelyne M/	ATSON			×
cheduled Date					
Jacquelyne MATSON	Aged 87 (3) July 1936), Female Requested by Contact Eldon Cromn 02 4712 (288) Request submitted by: Farah Moy Citerial last assessed by: Dagmar Ra	ader	Reason for reques Clients change in ci Change in care nee Impact on client's n She is 85 years assistance with don	It incumstances: ds Beeds: She has a hep replacement and she need some nestics assistance	

•

2. From the dropdown list select either **Urgent** or **Non-urgent** and select an assessor from the list then **ASSIGN**. When changing priority to **Urgent** you must enter the reason for changing the priority in **Reason description**.

Assign this r	eview for Raymond C	reenan	
All fields marked with an aste	erisk (*) are required.		
Change support plan review priority?			
Urgent		•	
Reason description: *			
Change in carer availability			
		28 / 255	
Assign to:*			
O Dennis BOUY	(11 assessments and 0 reviews assigned)		
O Clarence CATRONE (	(0 assessments and 2 reviews assigned)		
O Ernest CATRONE	(2 assessments and 0 reviews assigned)		
Nathan CATRONE	(2 assessments and 0 reviews assigned)		
O Robert CATRONE	(4 assessments and 0 reviews assigned)		
O Samuel CATRONE (	(0 assessments and 0 reviews assigned)		
	(0 assessments and 0 reviews assigned)		
<ul> <li>Edgar CONLAN (</li> </ul>			

A confirmation message will be displayed, and the reviews priority will be saved.

You have successfully assigned this review to the assessor.

# Changing the Support Plan Review priority after being assigned

To change Support Plan Review priority after it has been assigned follow the below steps.

1. Navigate to Assigned reviews tab, open a client card and select CHANGE PRIORITY.

Assessor Portal		Assessment referrals	Review requests	Find a client	Find a service provider	Reports and documents	Tasks and notifications	My Aged Care interactions	Logout
Home   Manage Assigned Reviews									
Norman Darga									
Carfield MEHAN									
MORDIALLOC, VIC, 3195     Aged care user ID. Ac50230059     Requested review date: 14 September 2018     Actual review date: 17 September 2018     Request action date: 24 September 2018					×				
In Progress									
Frank Davidson	Aged 89 (13 August 1931), Female Representative NA Contact Arthur Coman 02.6752.646 02.6752.646 Request submitted by Jessie Darga Chirate bit Ansered by Bac Charga	Reason for request Clients change in circum Change in care needs Impact on client's needs And the heaven's scowl began to blow He turns guess Then I made a hi	nstances: s: ed and the husk; to me and Cap : ke for I didnt like	ys howleded and t says he III cash in e to hear h 925481	he wind this trip I 121				
<ul> <li>✓ MORDIALLOC, VIC, 3195</li> <li>Aged care user ID. Ac32022645</li> <li>Requested review date: 24 July 2019</li> </ul>	Assigned to: Frank Davidson REASSIGN REVIEW CANCEL REVIEW CHANGE PRIORITY	VIEW FULL CLIENT RECOR	RD VIEW ALI	L CLIENT NOTES					
Not Started					-				
Steve Herrera									
DANDENONG, VIC, 3175     Aged care user ID: AC28245650									•

2. Select from the drop-down list then CHANGE PRIORITY.

When changing priority to **Urgent** you must add the reason for changing the priority in **Reason description** then select **CHANGE PRIORITY**.

Assessor Portal				Assessment referrals	Review requests	Find a client	Find a service provider	Reports and documents	Tasks and notifications	My Aged Care interactions	Logout
🖀 Home   Manage As	signed Revie	ews									
Last name @	First name	Age	ed care user		Scheduled /	Requested		Review	X Assigned to	🔶 Urgency 🍕	
🖉 Mehan	Garfield	A	Change	e support	plan re	eview p	riority foi	r Charlie	Norman Darg	ja 🛕 Urgent	
🖉 Kearny	Michael	A	Catrone	Э					Clarence Cat	rone	
💽 Lapa	Julius	A							Claude Kearr	ıy	
Catrone	Charlie	A	All fields marked wi	ith an asterisk (*) are re	quired.				Frank Davids	on	
Aged 8 Reques	9 (13 Augus) sted by	1931	Select new priority Non-urgent Urgent								
N/A	entative		Reason description: *								
Arthur 0 02 6752	Conlan 2 6498							0 / 2	55 i to		
Reques Client la Assigne	t submitted ast assessed ad to:	by: I by:					CHANGE PR	RIORITY	-		
REAS	SIGN REVIE	N	CANCEL REVIEW	CHANGE PRIORITY	VIEW FULL CLIE		EW ALL CLIENT NOT	ES			

A confirmation message will be displayed, and the reviews priority will be displayed in the **Assigned review** tab.

You have successfully changed the priority of this review.	×