



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:

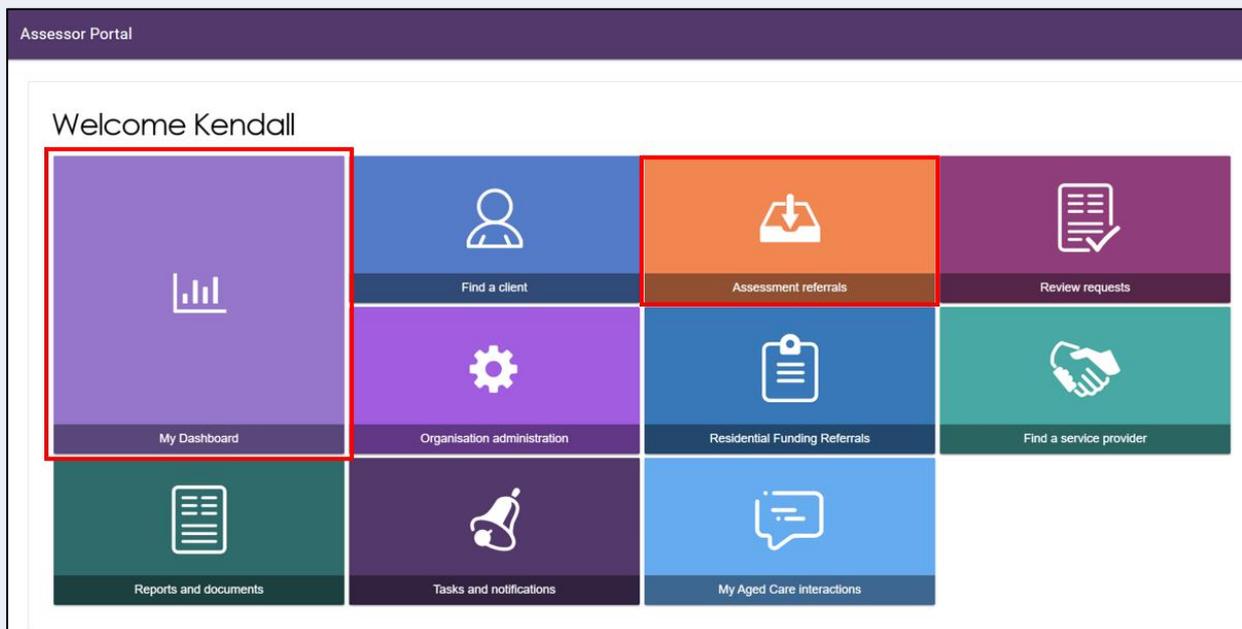
Function	Team Leader	Triage Delegate
Viewing incoming, accepted and assigned assessment referrals	✓	
Viewing triaged assessment referrals	✓	✓
Accept an incoming assessment referral	✓	
Reject or transfer an incoming, accepted or triaged assessment referral	✓	
Assign an accepted assessment referral to myself (if a triage delegate) or another triage delegate for triage		✓
Complete triage		✓
Reassign an accepted assessment referral or an assessment while triage is in progress		✓
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.	✓	

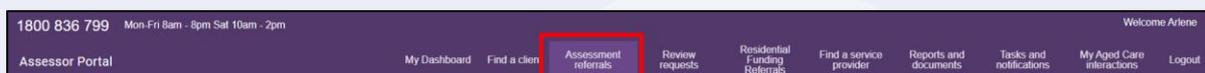
Viewing incoming assessment referrals and client information

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

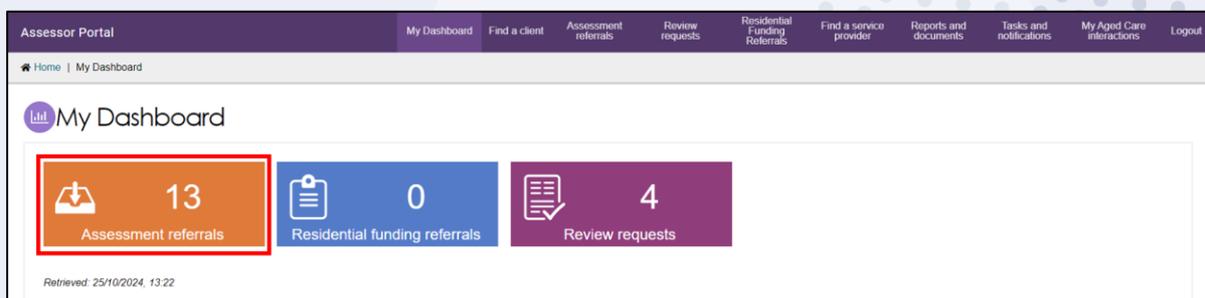
1. Select **My Dashboard** from the home page. You can also select **Assessment referrals** on the homepage.



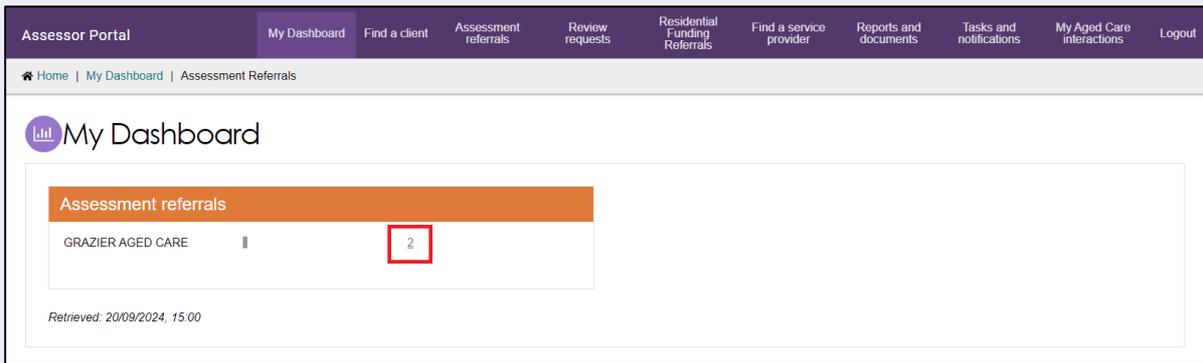
Alternatively, select **Assessment referrals** from the tool bar at the top right-hand corner of the portal.



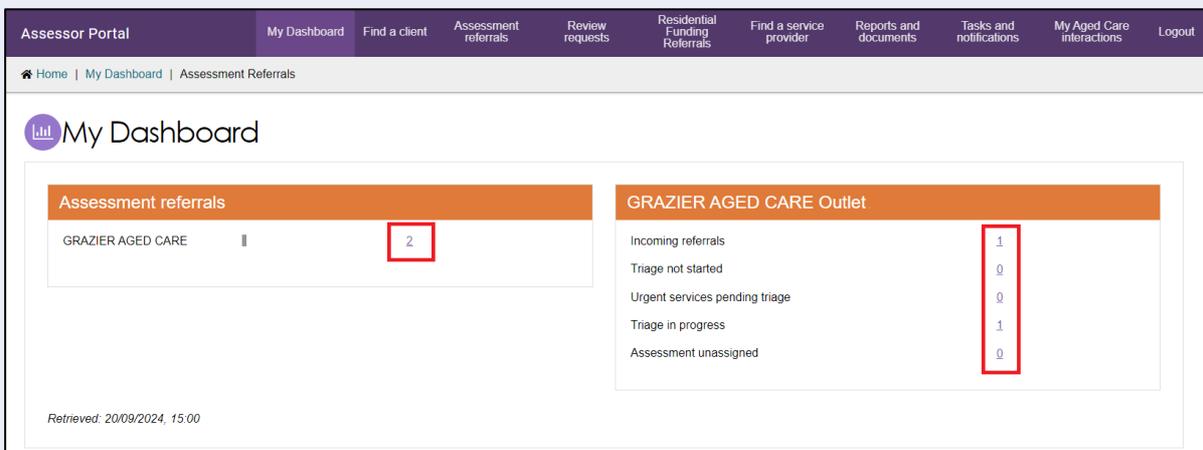
2. Select the **Assessment referrals** in the **My Dashboard** page.



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



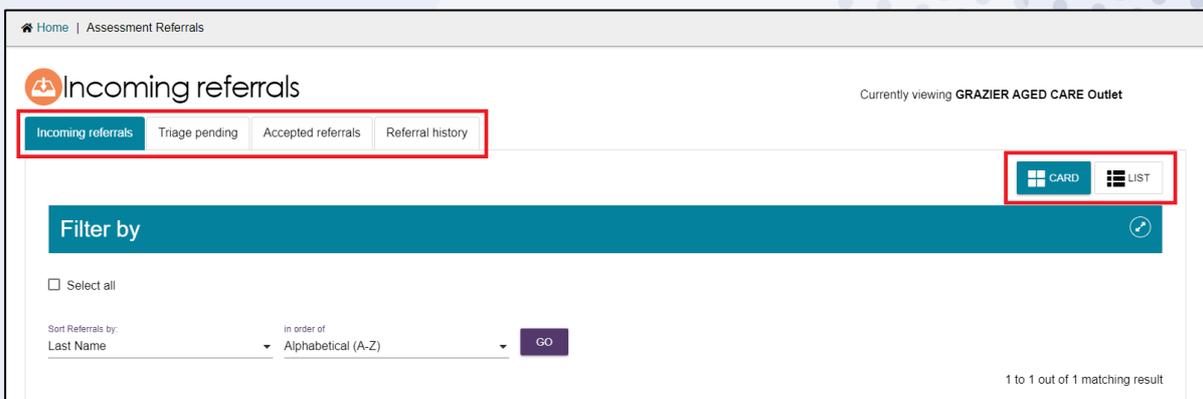
- The **Incoming referrals** and **Unassigned** assessment referrals will be displayed.



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



- 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.



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

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.

UATAdrain (Vern) RTAGJAEDEN

Aged 82 (11 August 1941), Male Referred from Aged Care Gateway on 24 May 2024

Preferences
No preference was recorded

Assessment details

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

Latest screening 25 April 2024 

Action Referral due by 27 May 2024

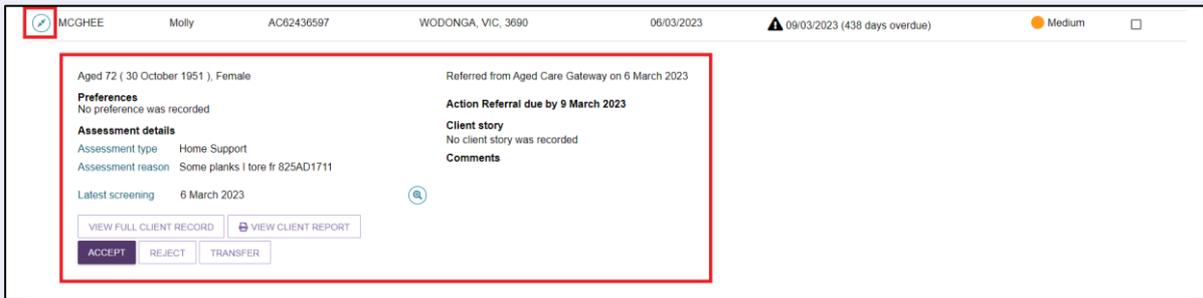
Client story
No client story was recorded

Comments

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

ACCEPT REJECT TRANSFER

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



! 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

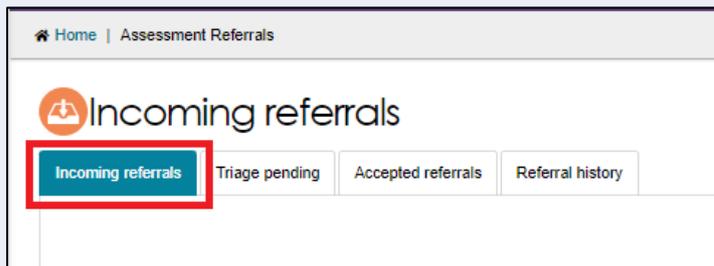
The process is described in [My Aged Care - Assessor Portal User Guide 2 - Registering support people and adding relationships](#).

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

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.



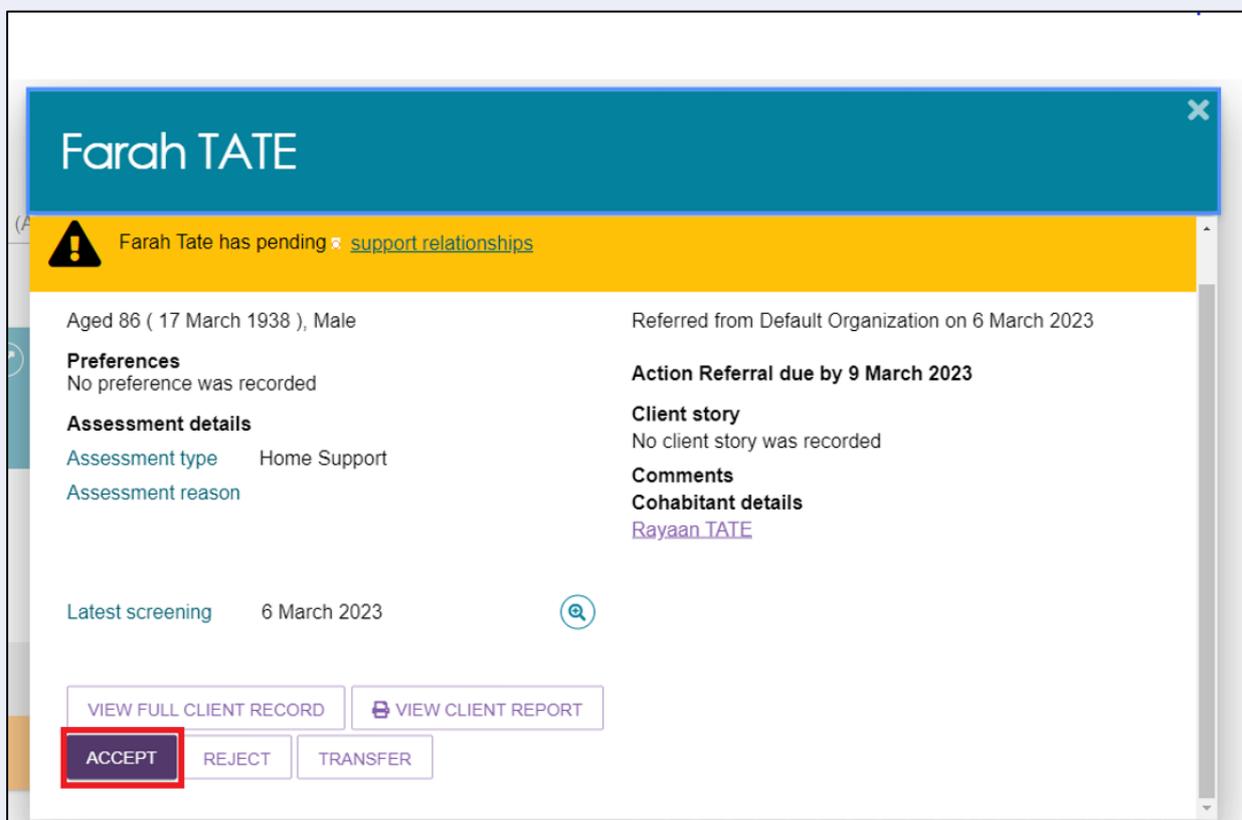
10. If you want to view the information available in the client record you can either go back on your internet browser to return to the **Incoming referrals** page or choose the **Incoming referrals** option from the tool bar.



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.



FIELD Lily AC65143935 DOWNER, ACT, 2602 19/02/2019 22/02/2019 (Due in 3 days) Medium

Aged 84 (17 February 1935), Female Referred from Aged Care Gateway on 19 February 2019

Preferences
No preference was recorded

Assessment details
Assessment type Home Support
Assessment reason the client is eligible for CHSP
Latest screening 19 February 2019

Action Referral due by: 22 February 2019
Client story
No client story was recorded

! 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:

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: * 0 / 255

Triage category:

ACCEPT CANCEL

Note: 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.

Note: 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.

! Warning: 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 CANCEL

Client card for Olin VETTER

Assessment details:

- Assessment setting: Hospital
- Assessment reason: Self-Referral
- Assessor: Africa Green
- Triage conducted by: Africa Green

Support plan:

- Triage Completed
- Comprehensive Assessment: Triage Completed

Buttons: VIEW FULL CLIENT RECORD, VIEW CLIENT REPORT, REFER URGENT SERVICES, START ASSESSMENT

- 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 [Assessor Portal User Guide 12 - Managing Delegate Roles](#).

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.

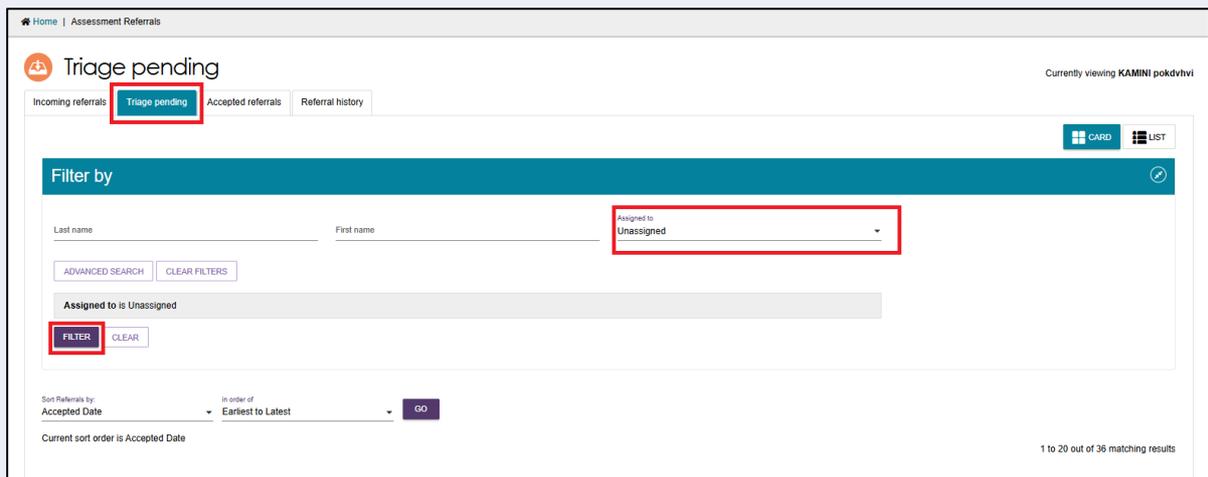
Once an assessment has been assigned to a Triage Delegate, they can proceed with the triage, reassign the triage to another Triage Delegate or unassign themselves and place the accepted referral back into the triage pending queue.

- To access triage pending referrals, select the **Triage pending** tab.

Note: 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**.

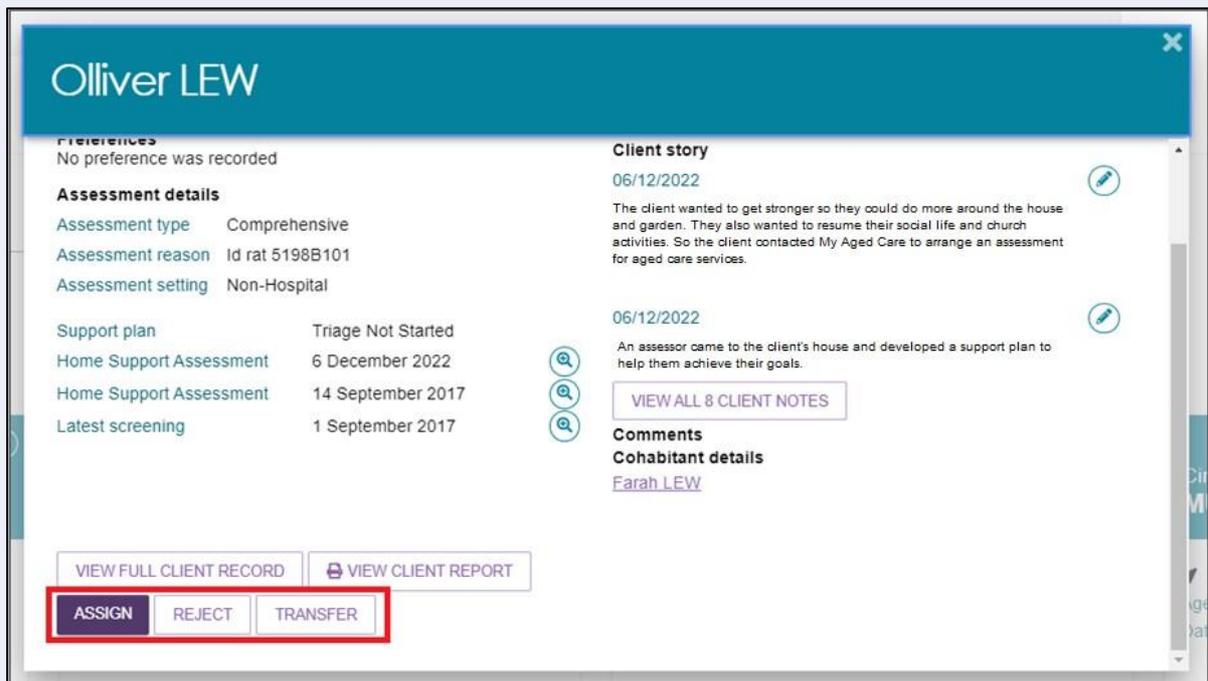




2. Expand the client card which you would like to assign triage for. To assign to yourself or another Triage Delegate for action select **ASSIGN**.

To transfer the referral to another outlet for triage select **TRANSFER**, for further information on transferring a referral see the section [Transferring an assessment referral to another outlet or organisation](#).

To reject the referral, select **REJECT**. For further information on rejecting a referral see the section [Rejecting an assessment referral](#).



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**.

Assign triage decision for Olliver LEW

Assign to*

Me

Monserrate SPICER

Jamaal LLOYD

Basil SHULTZ

Obadiah MURRY

Gertie RUVALCABA

Karma MCKAY

Bonita PAULINO

Outlet Team Lead NEVIN

Kenton PEARL

Sean SHACKELFORD

Angelita HERBST

Christel ZEPEDA

Amparo SALCIDO

Margaret PIERSON

Karen SPAIN

Lesley KUNZ

Jawad EGAN

Ashten CARVALHO

Tamekia MARKHAM

Matthias HYMAN

Hong OTT

Kevon LIBBY

ASSIGN CANCEL

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 [Unassign or reassign referral to an assessor](#).
- Refer to urgent services, for further information on referring for urgent services see [Referring for urgent services](#).
- Transfer, for further information on transferring a referral see [Transferring an assessment referral to another outlet or organisation](#).
- Reject, for further information on rejecting a referral see [Rejecting an assessment 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.

Home | Assessment Referrals

Triage pending

Incoming referrals | **Triage pending** | Accepted referral

Filter by

Last name

ADVANCED SEARCH CLEAR FILTERS

Assigned to is Assigned to me

FILTER CLEAR

Sort Referrals by: Accepted Date in order of Earliest to Latest

Current sort order is Accepted Date

Stella STACEY

Please confirm that Stella STACEY, 29 April 1950, 74 Years, AC34201301 is the person you are conducting this assessment for. If the person details are incorrect, 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

Assessment details

FNAO-preference Yes
Assessment type Comprehensive
Assessment reason Self-Referral
Assessment setting Hospital
Assessor Africa Green

Completed Triage due by 15 February 2025

Client story
No client story was recorded

Comments

VIEW FULL CLIENT RECORD VIEW CLIENT REPORT

START TRIAGE REASSIGN REFER URGENT SERVICES REJECT TRANSFER

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, 74 Years, AC34201301 is the person you are conducting this assessment for. If the person details are incorrect, 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

Assessment details

FNAO-preference Yes
Assessment type Comprehensive
Assessment reason Self-Referral
Assessment setting Hospital
Assessor Africa Green

Completed Triage due by 15 February 2025

Client story
No client story was recorded

Comments

VIEW FULL CLIENT RECORD VIEW CLIENT REPORT

START TRIAGE REASSIGN REFER URGENT SERVICES 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.
- The assessment organisation will collect personal information about you, such as your name and address, and information about your health and care needs.
- The information you provide will be recorded in your My Aged Care client record.
- 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.
- The information you provide may also be recorded in the assessment organisation's IT systems.
- 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.
- 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.
- 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.
- 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.
- Do we have your consent to confirm whether Olliver Lew needs a home support or comprehensive assessment?

Consent Obtained From *

CONTINUE CANCEL

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

- The assessment is no longer required
- 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

assessment.

- The assessment organisation will collect personal information about you, such as your name and address, and information about your health and care needs.
- The information you provide will be recorded in your My Aged Care client record.
- 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.
- The information you provide may also be recorded in the assessment organisation's IT systems.
- 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.
- 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.
- 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.
- 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.
- Do we have your consent to confirm whether Olliver Lew needs a home support or comprehensive assessment?

Consent Obtained From *

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.

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

Note: 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.

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.

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

Demographic details

Does the client identify as an Aboriginal or Torres Strait Islander?
 Indigenous origin:

No - Neither
 Yes - Aboriginal
 Yes - Torres Strait Islander
 Yes - Both
 Not stated/inadequately desc

Does the client prefer a First Nations Assessment Organisation for their assessment? ▼

Preferred language *
 English ▼

Marital status *
 Separated ▼

Accommodation type *
 Independent Living ▼

Lives with *
 With partner ▼

Government ID references

Department of Veterans' Affairs (DVA) card number ▼



- Follow the prompts for the pre-populated or blank triage. All mandatory questions must be answered before completing triage by selecting **COMPLETE TRIAGE** button.
- 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.

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

- 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 cancellation has been confirmed the referral will be rejected and the Triage Delegate will be navigated back to the client summary page.

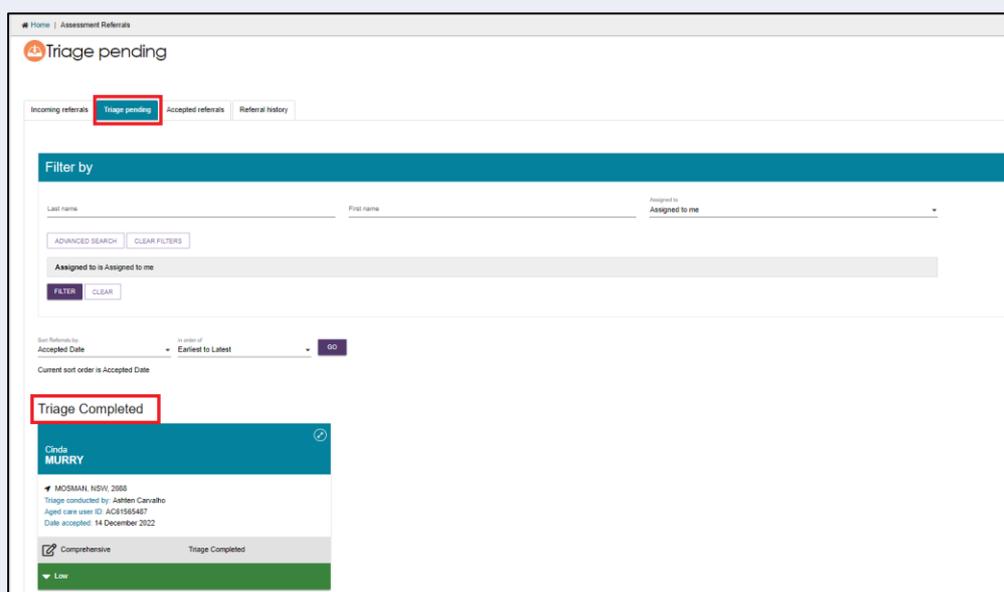
- Once **COMPLETE TRIAGE** has been selected, a pop up will confirm that you would like to complete the triage. Select **COMPLETE TRIAGE** to finalise.

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.



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

Preferences
No preference was recorded

Assessment details
Assessment type Home Support
Assessment reason

Triage conducted by Garnet Bermudez

Support plan ● Triage Completed
Home Support Assessment ● 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.

[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**.

Kim JOLLEY

Aged 68 (24 October 1955), Male

Referred from Aged Care Gateway on 19 September 2024
Accepted on 19 September 2024

Preferences
No preference was recorded

Assessment details
Assessment type Comprehensive
Assessment reason the client has needs that exceed a basic support programme
Assessment setting Non-Hospital
Triage conducted by Simon Flower

Support plan ● Triage Completed
Comprehensive Assessment ● Triage Completed
Latest screening 19 September 2024

Completed Triage due by 22 September 2024

Client story
No client story was recorded

Comments

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

[ASSIGN TO ASSESSOR](#) [REFER URGENT SERVICES](#) [CONVERT TO HOME SUPPORT ASSESSMENT](#) [REJECT](#) [TRANSFER](#)



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

Support plan and services

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

Client concerns and goals

[ADD AREA OF CONCERN](#)

No client concerns or goals.

Other recommendations

[ADD A GENERAL RECOMMENDATION](#) [ADD A SERVICE RECOMMENDATION](#)

There are no service recommendations for this client

[RETURN TO 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 ASSESSMENT**.

Kim JOLLEY

Aged 68 (24 October 1955), Male

Referred from Aged Care Gateway on 19 September 2024
Accepted on 19 September 2024

Completed Triage due by 22 September 2024

Preferences
No preference was recorded

Assessment details
Assessment type Comprehensive
Assessment reason the client has needs that exceed a basic support programme
Assessment setting Non-Hospital
Triage conducted by Simon Flower

Support plan
Comprehensive Assessment Triage Completed
Latest screening 19 September 2024

Client story
No client story was recorded

Comments

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

[ASSIGN TO ASSESSOR](#) [REFER URGENT SERVICES](#) **[CONVERT TO HOME SUPPORT ASSESSMENT](#)** [REJECT](#) [TRANSFER](#)



- 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**.

The screenshot shows a dialog box titled "Convert to home support assessment" with a close button (X) in the top right corner. The main text reads: "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?" Below this, it states "All fields marked with an asterisk (*) are required." There is a dropdown menu for "Reason for change *" with "Low level care needs" selected. Below the dropdown is a text area for "Reason or comments: *" with a character count of "0 / 255". At the bottom right, there are two buttons: "YES, CONVERT ASSESSMENT" (highlighted with a red box) and "NO, CANCEL".

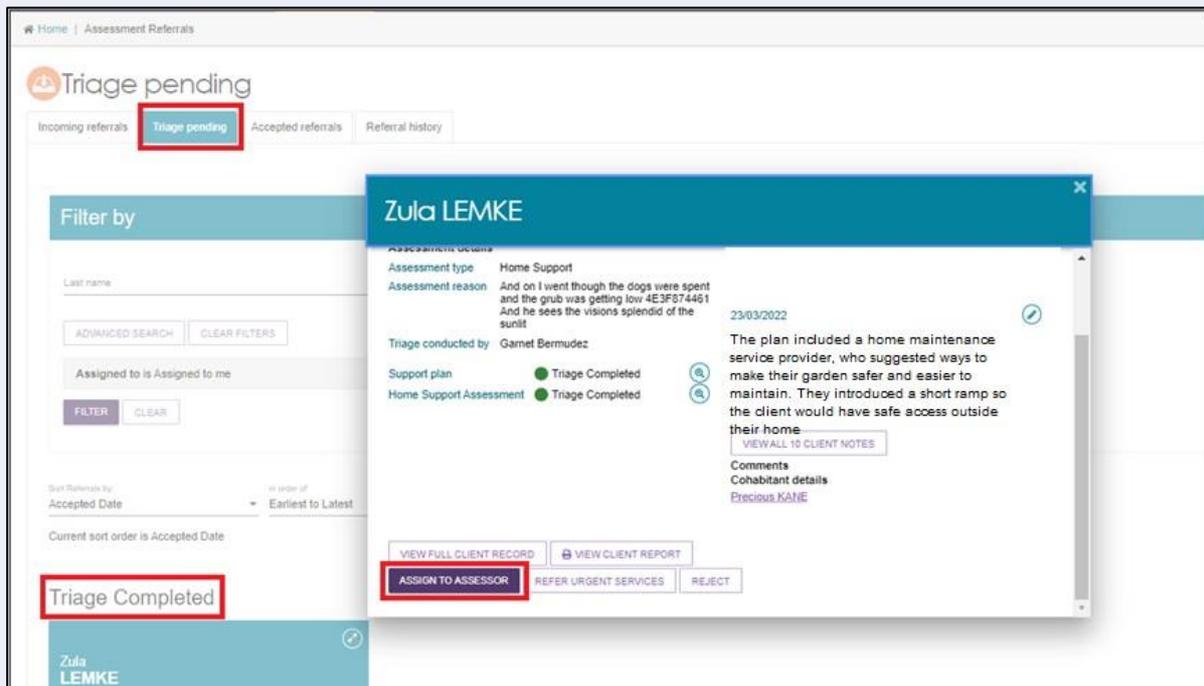
When converting from a Home Support Assessment to a Comprehensive Assessment, Triage Delegates will need to enter the **Reason for change** as being **High level care needs**.

The screenshot shows a dialog box titled "Convert to comprehensive assessment" with a close button (X) in the top right corner. The main text reads: "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?" Below this, it states "All fields marked with an asterisk (*) are required." There is a dropdown menu for "Reason for change *" with "High level care needs" selected. Below the dropdown is a text area for "Reason or comments: *" with a character count of "0 / 255". At the bottom right, there are two buttons: "YES, CONVERT ASSESSMENT" (highlighted with a red box) and "NO, CANCEL".

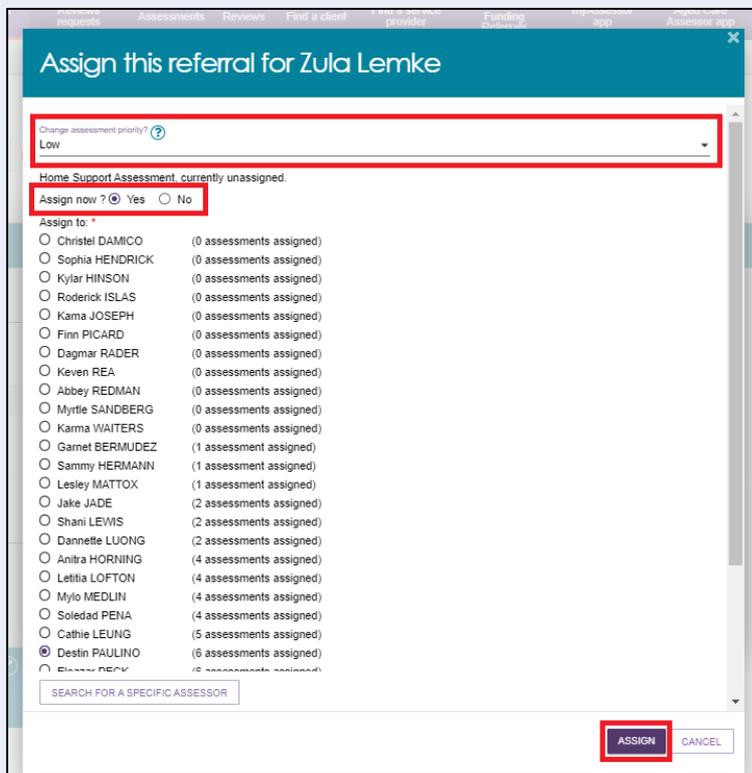
Assigning an assessment referral to an assessor

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

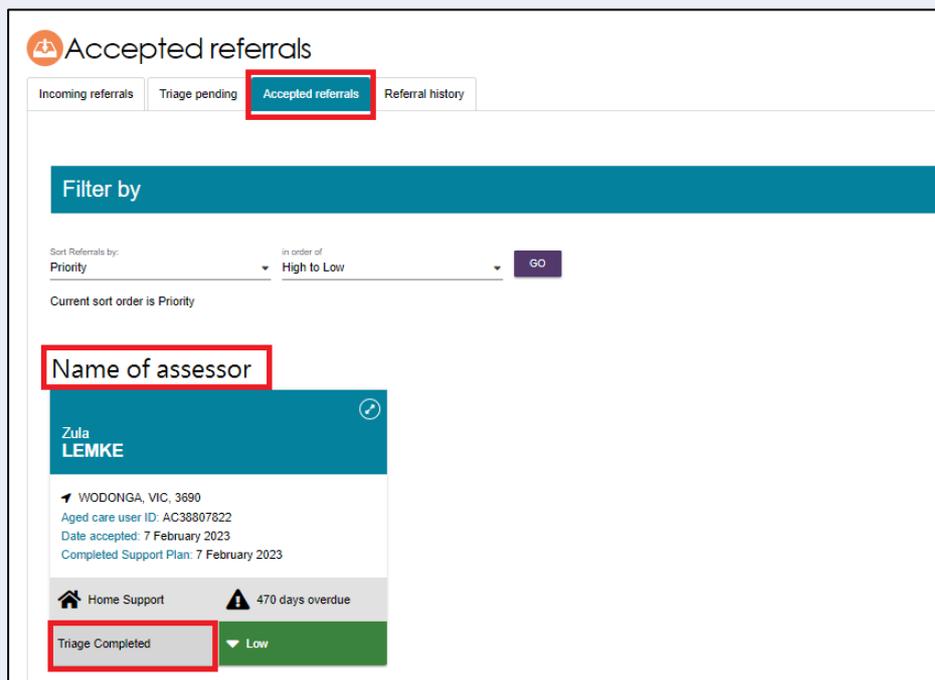
1. Referrals that can be assigned are located in the **Triage pending** tab, under the **Triage Completed** heading. Expand the client card for the referral you wish to assign, select **ASSIGN TO ASSESSOR**.



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.



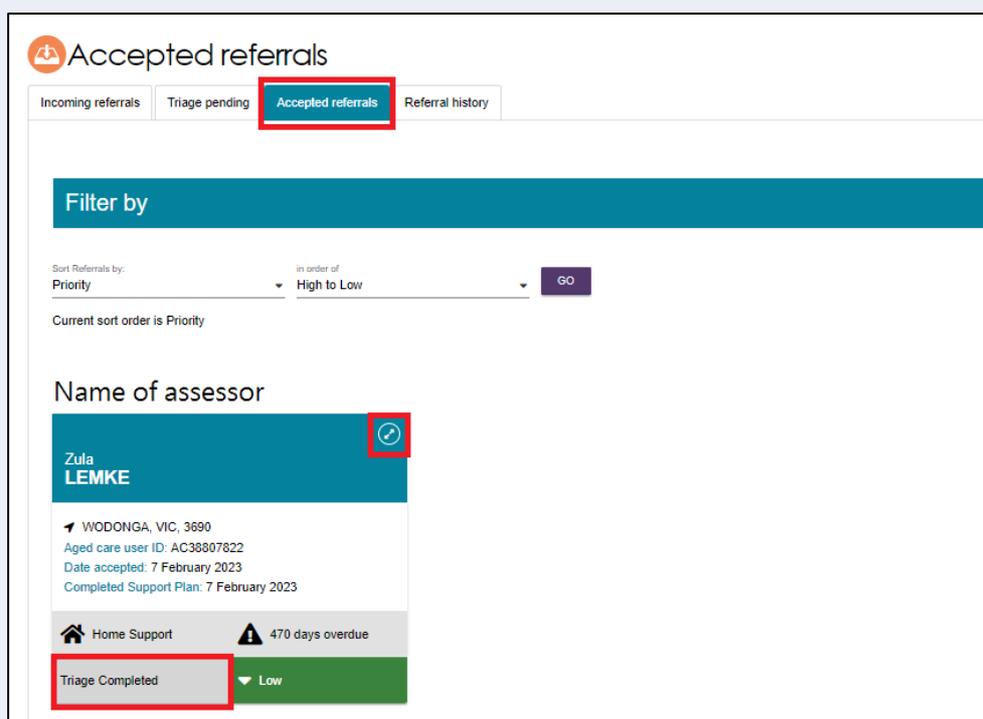
3. The assessment referral will appear in the **Accepted referrals** list, under the name of the assessor the referral was assigned to. The referral will also appear in the assigned assessor's **Current assessments** list for action.



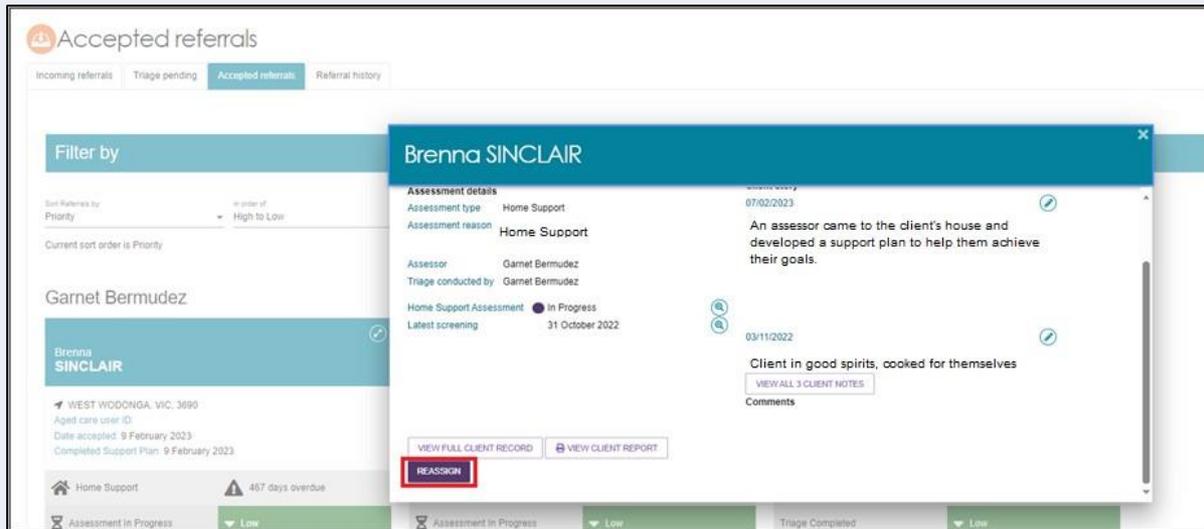
Unassigning or reassigning an assessment referral

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.

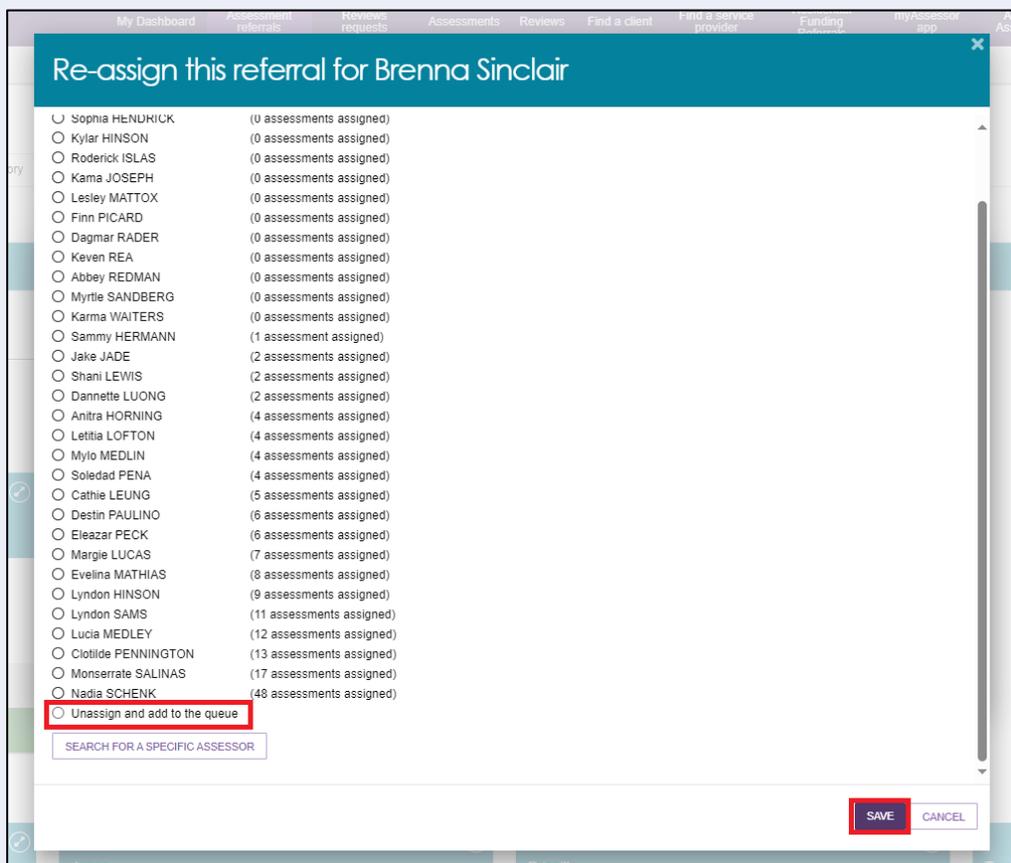
1. From the **Accepted referrals** tab, access the expanded referral view by selecting the arrow on the client card.



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



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**.



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



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

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.



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.

Reject this referral for John Door

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

Rejection reason:

0 / 500

REJECT CANCEL

! 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:*

- 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
- Prefer Indigenous assess org
- Hospital assessment required
- Client prefer later assessment
- Ineligible at Triage
- 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

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)

Choose a file...

REJECT CANCEL

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

Aged 84 (17 January 1935), Female

Referred from Aged Care Gateway on 14 February 2019
Accepted on 14 February 2019

Finalised Support Plan due by: 28 February 2019

Client story
No client story was recorded

Preferences
No preference was recorded

Assessment details
Assessment type Home Support
Assessment reason the client is eligible for CHSP

Latest screening 14 February 2019

VIEW FULL CLIENT RECORD VIEW PDF OF CLIENT RECORD

REASSIGN REJECT **TRANSFER**

LIST view example:

FIELD Lilly AC65143935 DOWNER, ACT, 2602 19/02/2019 Not Started (Finalised Support Plan) 05/03/2019 Joel Swift Medium

Aged 84 (17 February 1935), Female

Referred from Aged Care Gateway on 19 February 2019
Accepted on 19 February 2019

Finalised Support Plan due by: 5 March 2019

Client story
No client story was recorded

Preferences
No preference was recorded

Assessment details
Assessment type Home Support
Assessment reason the client is eligible for CHSP

Latest screening 19 February 2019

VIEW FULL CLIENT RECORD VIEW PDF OF CLIENT RECORD

REASSIGN REJECT **TRANSFER**

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.

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 **VALIDATE THIS ADDRESS**. Below a list of addresses will be provided, select the most relevant address. To finalise the address, select **SAVE ADDRESS**.

Add address

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

Hospital outlet name (Building name) *
HOSPITAL

Street number e.g. 201 or 34-36 Street name
1 HOSPITAL

Street type
Crescent

Enter Suburb and postcode and select from the list below *
DEAKIN, ACT, 2600

SUBURB IS NOT LISTED, CLICK HERE

Country *
Australia

VALIDATE THIS ADDRESS

Did you mean
 HOSPITAL

more than 10 results, please refine search
 Not found, use entered address anyway: DEAKIN ACT 2600

Special 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

Assessment setting: (?)
 Hospital
 Non-Hospital

Search for Assessment Organisation: *
 Use the client's address
Client address
490 PROSPECT Road BLAIR ATHOL SA 5084
 Enter an alternative assessment address

SEARCH

Select Assessment Organisation *
 Northern Adelaide ACAT, MODBURY, Ph 02 5201 0347

Select a reason for transferring this client * (?)

Comments:

TRANSFER CANCEL

0 / 255

Select a reason for transferring this client * (?)

Select one

Select one

Insufficient capacity

Outside assessment org region

Client change in circumstances

Remote Assessment

Clinical staff not available

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**.

Transfer this referral for Collin Braddington

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

What type of assessment does the client require? *

Comprehensive Assessment

Assessment setting: ?

Hospital

Non-Hospital

Search for Assessment Organisation: *

Use the client's address

Client address

5 SECOND Avenue ASPENDALE VIC 3195

Enter an alternative assessment address

Enter a suburb/postcode

Enter suburb or postcode and select from the list below:

DONCASTER EAST, VIC, 3109

SEARCH

Select Assessment Organisation *

Central East ACAS, FOREST HILL, Ph 02 9606 3000

Select a reason for transferring this client * ?

Other

Comments: *

As discussed, this client has requested to be assessed by Central East ACAS based on a previous experience with a family member. The current client address is temporary and subject to change.

TRANSFER CANCEL

195 / 255

 Rosie Dender, Referral has been transferred successfully.

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.

Home | Find a client | Activeclient INDRANSW

Activeclient INDRANSW
Female, 78 years old, 1 July 1945, AC89727811
30 LORNA LIPPYMAN LANE, BONNER, ACT, 2914

Primary contact: Activeclient IndraNew (self)
No support relationships recorded

Notes

Client summary Client details Support network Approvals Plans Attachments Services My Aged Care interactions **Notes** Tasks and Notifications Residential Funding Classifications

REFER THIS CLIENT FOR ASSESSMENT VIEW CLIENT REPORT

Filter by

Sort by: Please select GO

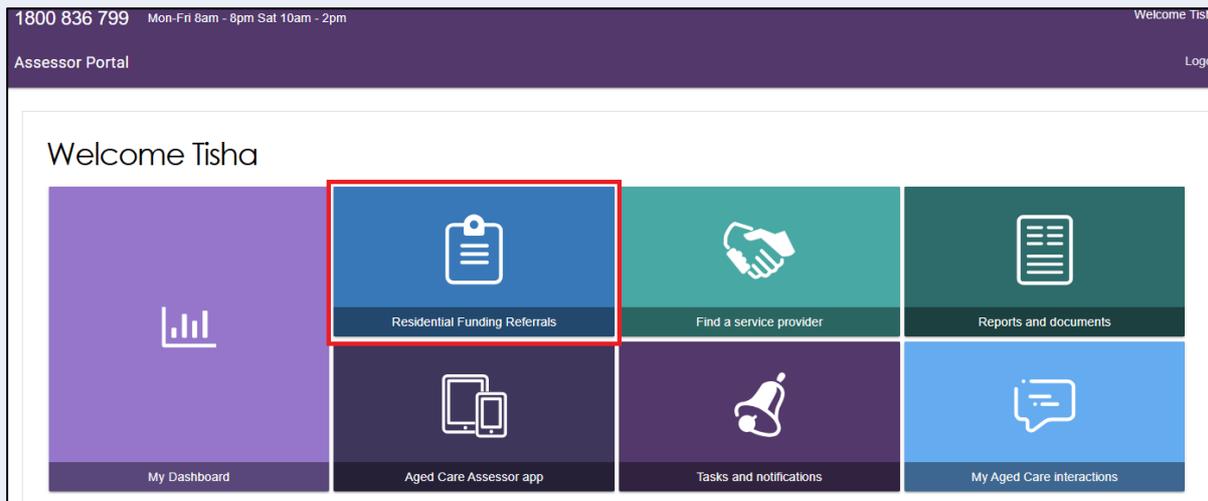
ADD A NOTE

Date created	End date	Note type	Description	Created by organisation	Created by outlet	Note status
11/12/2023		Referral Note	This client record has now been transferred from Indra Combined Assessment to Indra Combimeone Assessment on 11/12/2023	System	System	Active
08/12/2023		Other	wadssa	System	System	Active
08/12/2023		Other	dtffts	System	System	Active
08/12/2023		Other	aaddsa	System	System	Active
08/12/2023		Other	ssda	System	System	Active



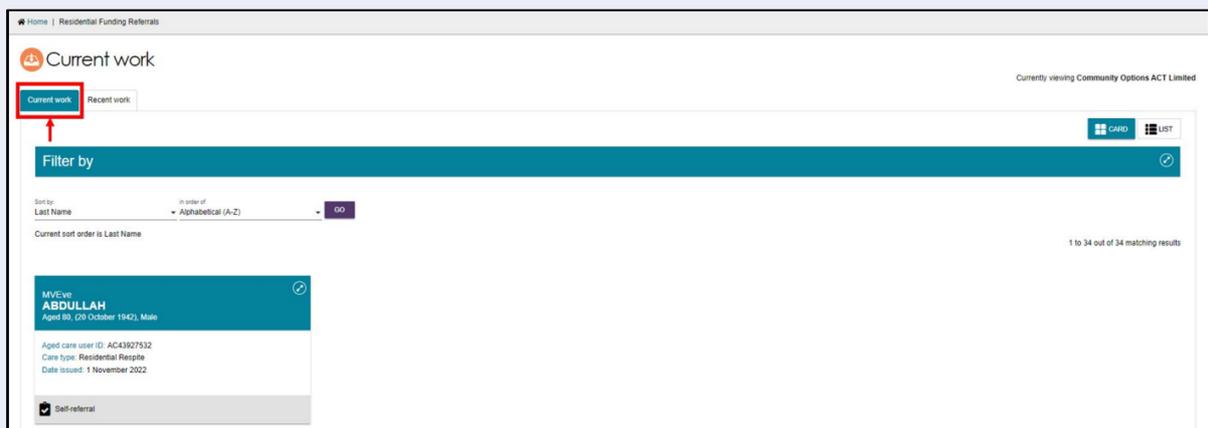
Residential Funding Referrals

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

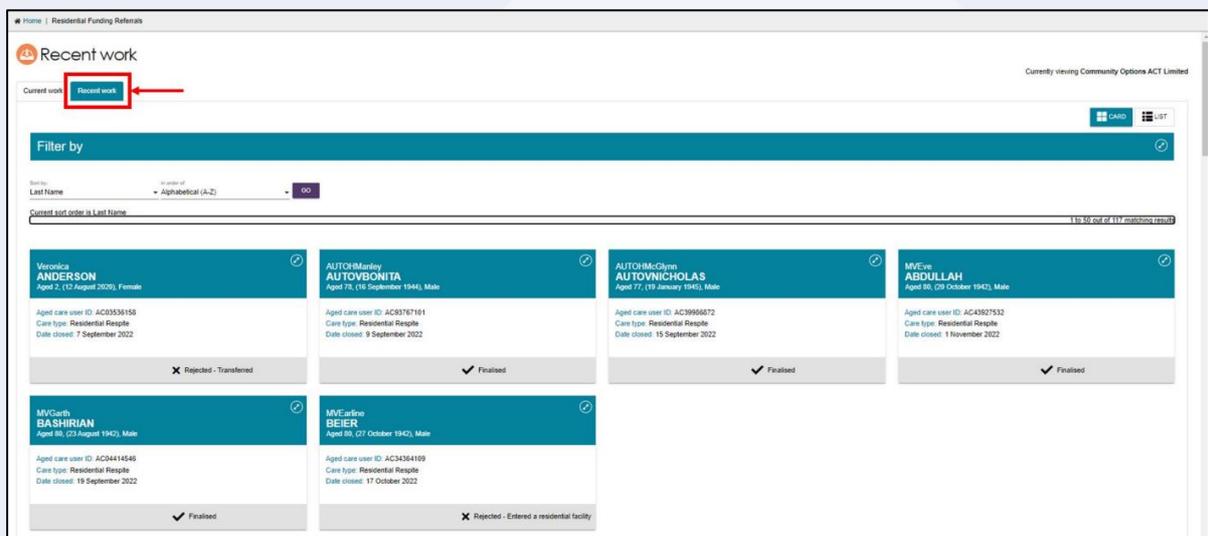


A clinical aged care needs assessor (clinical needs assessor) will have access to the **Current Work** and **Recent Work** tabs.

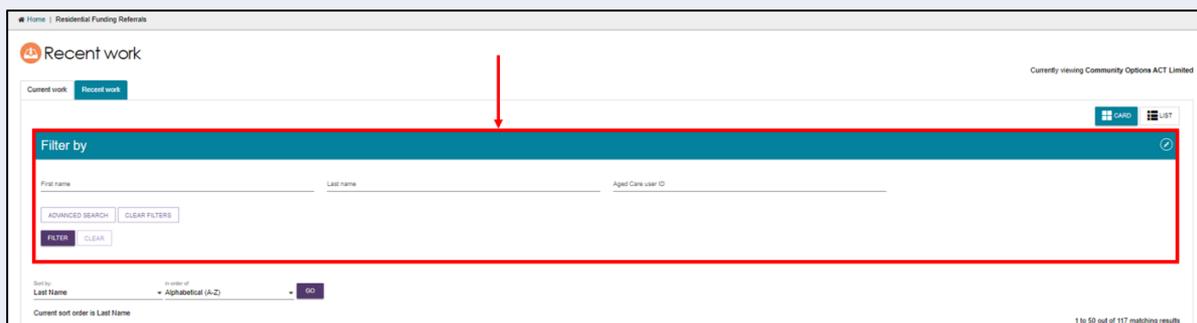
The **Current Work** tab contains Residential Respite Assessments that are assigned to you.



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



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

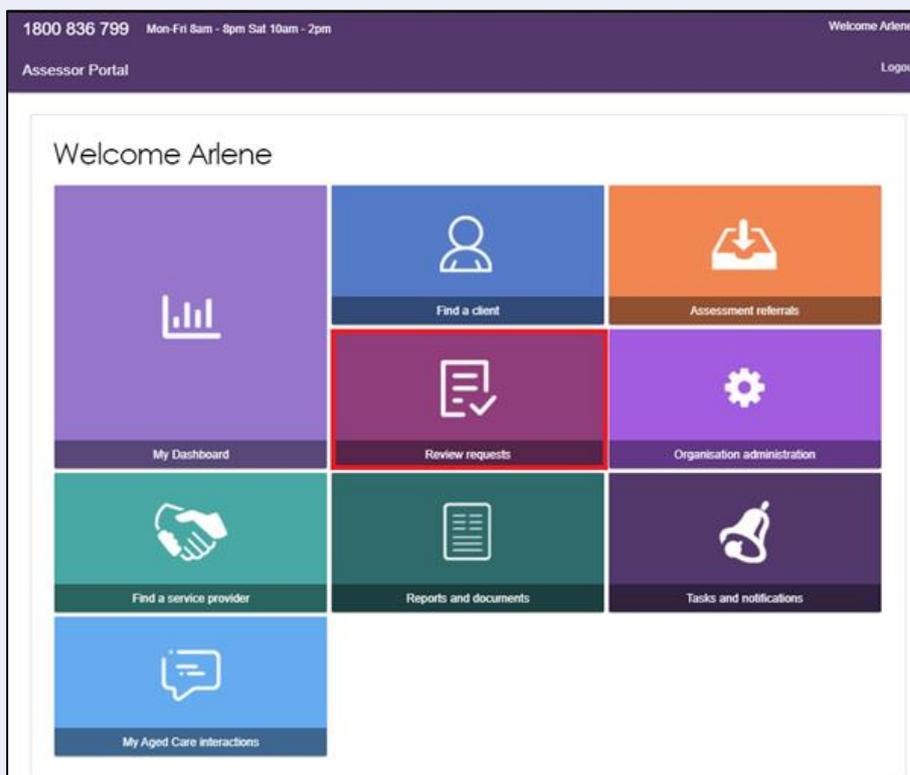


For more information on self-referring a client and starting a Residential Respite Assessment, please refer to the [Aged Care Assessor Application User Guide](#).

Support Plan Reviews

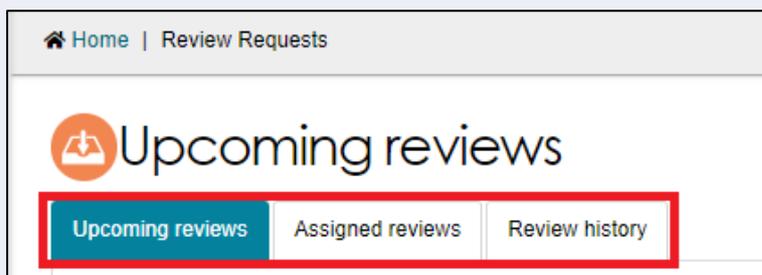
! When a new assessment is raised for a client, the assessment referral will be required to undergo triage. This includes new assessments which have resulted from a Support Plan Review where it has been identified that the client's needs have changed to the point of needing a new assessment.

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



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.

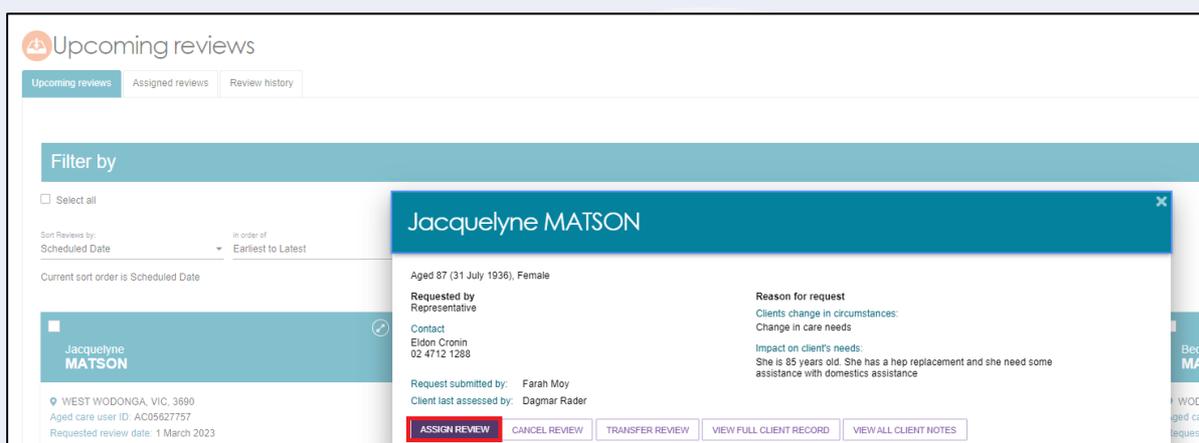
In the **Review history** tab team leaders can view a history of completed and cancelled reviews.

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
 - Impact on client's needs
 - Primary reason for request
 - 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.

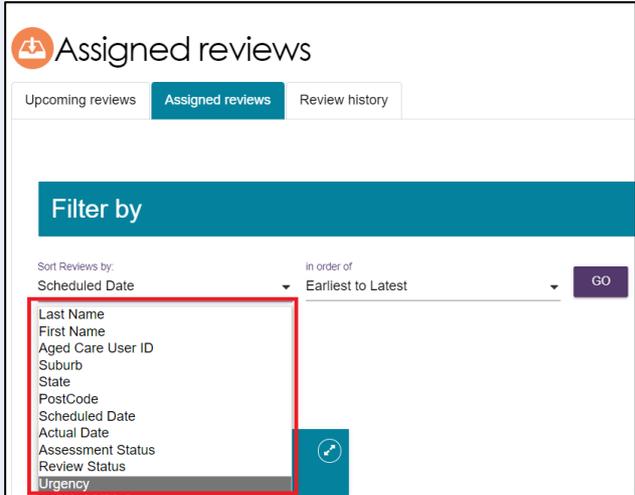


! If the client has pending support relationships, a banner will be displayed on the review. Team leaders are able to confirm pending support relationships for clients, this process is described in [My Aged Care – Assessor Portal User Guide 2 – Registering support people and adding relationships](#).



 Cassius Client has pending [support relationships](#)

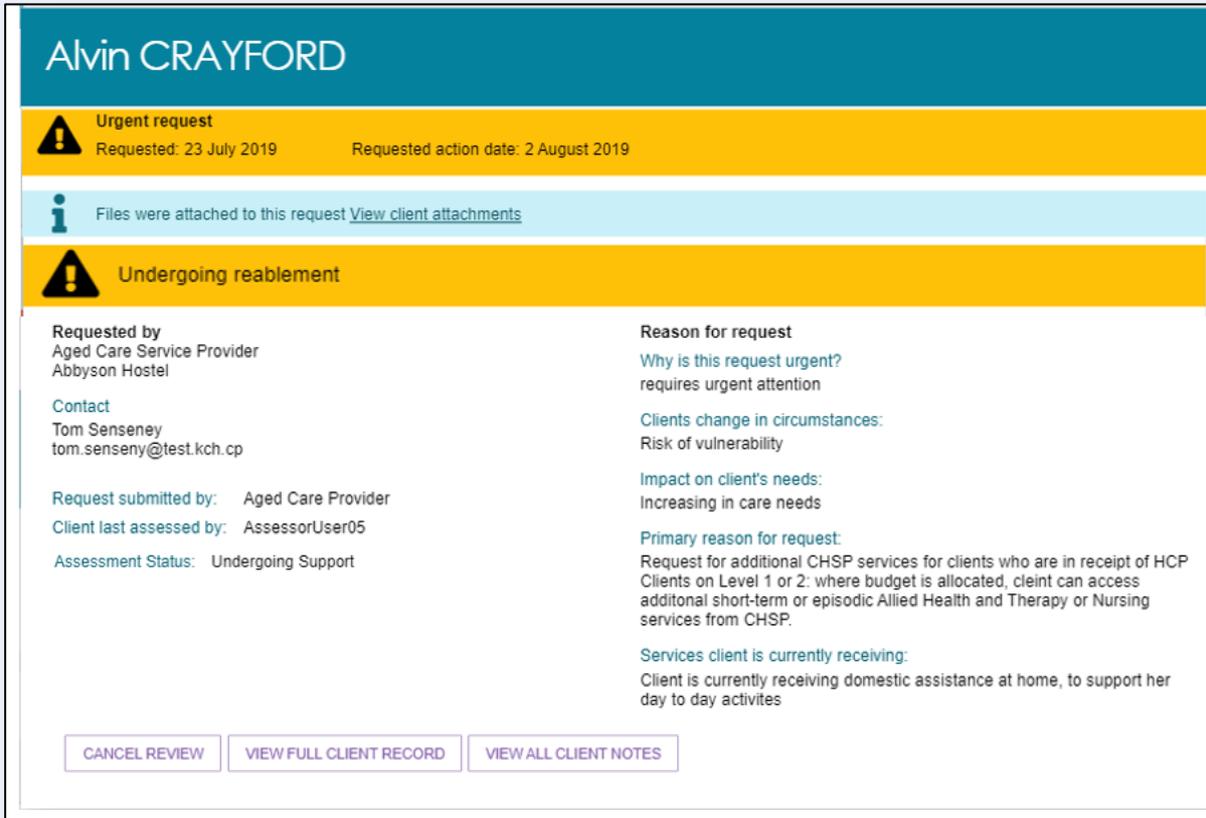
Team leaders can sort, and filter Support Plan Reviews based on several categories.



The screenshot shows the 'Assigned reviews' section of a web application. It includes tabs for 'Upcoming reviews', 'Assigned reviews', and 'Review history'. Below the tabs is a 'Filter by' section with a dropdown menu for 'Sort Reviews by' (currently set to 'Scheduled Date') and another dropdown for 'In order of' (currently set to 'Earliest to Latest'). A 'GO' button is next to these dropdowns. A red box highlights a list of filter options: Last Name, First Name, Aged Care User ID, Suburb, State, PostCode, Scheduled Date, Actual Date, Assessment Status, Review Status, and Urgency.

Assigning a Support Plan Review

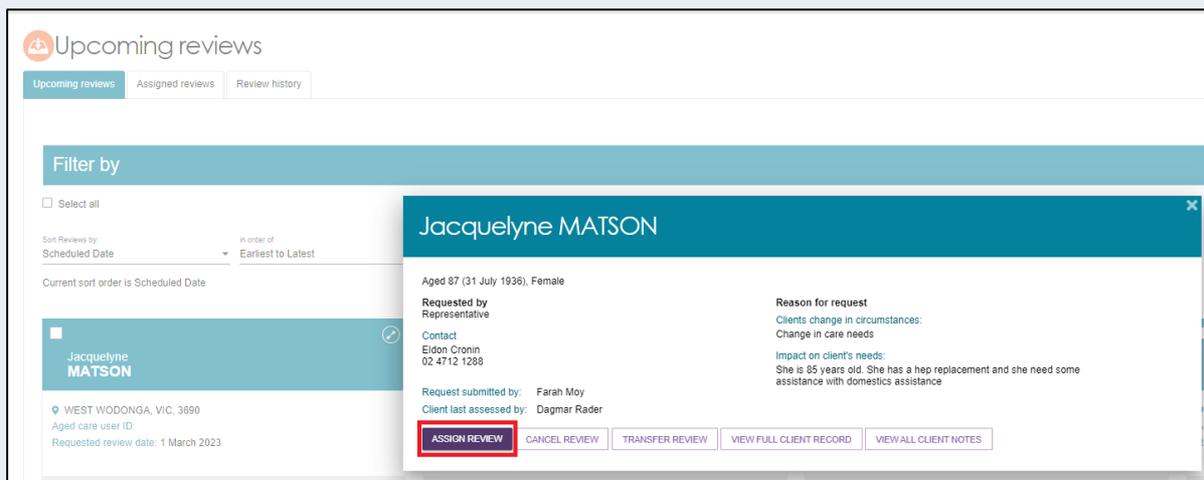
Team leaders will only be able to assign the Support Plan Review request that has the parent assessment type as Home Support assessment then only to non-clinical aged care needs assessors (non-clinical assessor) within the outlet. If the client is undergoing support, the team leader is to contact the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



The screenshot displays the client record for Alvin CRAYFORD. At the top, there is a teal header with the client's name. Below this, a yellow banner indicates an 'Urgent request' with a warning icon, showing it was requested on 23 July 2019 and the requested action date is 2 August 2019. A light blue banner below that shows an information icon and a link to 'View client attachments'. Another yellow banner indicates the client is 'Undergoing reablement' with a warning icon. The main content area is divided into two columns. The left column contains details about the request: 'Requested by' (Aged Care Service Provider, Abbyson Hostel), 'Contact' (Tom Senseney, tom.senseney@test.kch.cp), 'Request submitted by' (Aged Care Provider), 'Client last assessed by' (AssessorUser05), and 'Assessment Status' (Undergoing Support). The right column contains details about the request: 'Reason for request' (Why is this request urgent? requires urgent attention), 'Clients change in circumstances:' (Risk of vulnerability), 'Impact on client's needs:' (Increasing in care needs), '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, client can access additional short-term or episodic Allied Health and Therapy or Nursing services from CHSP.), and 'Services client is currently receiving:' (Client is currently receiving domestic assistance at home, to support her day to day activities). At the bottom of the record, there are three buttons: 'CANCEL REVIEW', 'VIEW FULL CLIENT RECORD', and 'VIEW ALL CLIENT NOTES'.

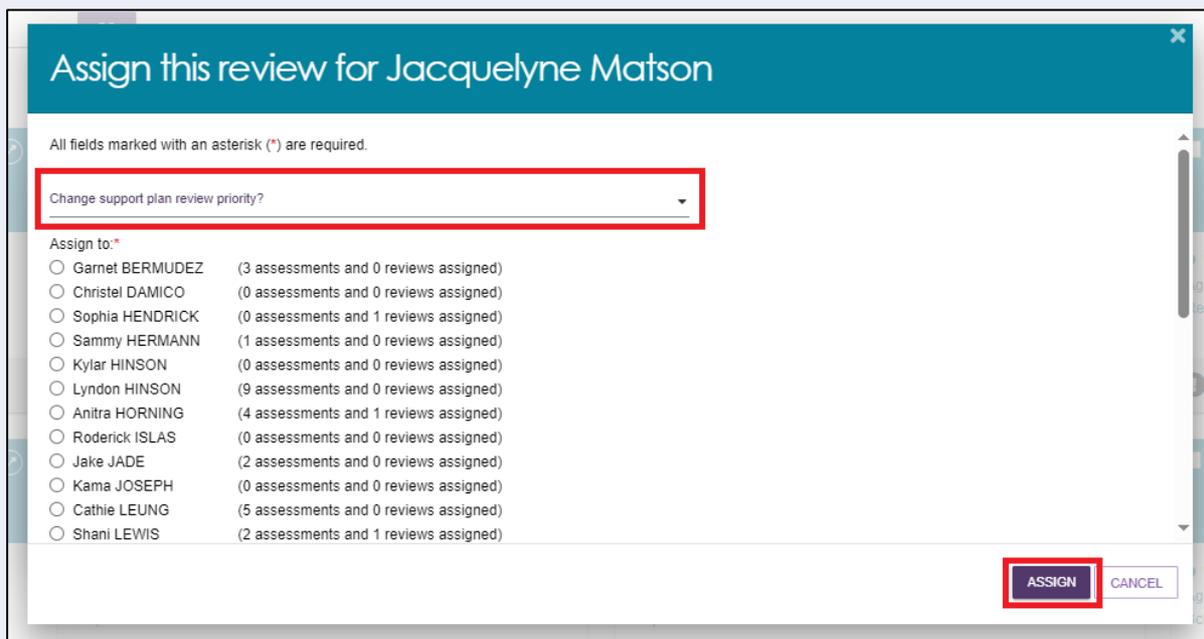
To assign a Support Plan Review, follow the steps below.

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



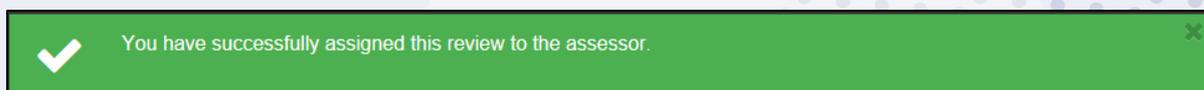
The screenshot shows the 'Upcoming reviews' section of a software interface. At the top, there are tabs for 'Upcoming reviews', 'Assigned reviews', and 'Review history'. Below the tabs is a 'Filter by' section with a 'Select all' checkbox and sorting options for 'Sort Reviews by: Scheduled Date' and 'In order of: Earliest to Latest'. A client card for 'Jacquelyne MATSON' is displayed, showing her age (87), gender (Female), and contact information. The card also lists the 'Requested by Representative' (Farah Moy) and the 'Client last assessed by' (Dagmar Rader). A red box highlights the 'ASSIGN REVIEW' button on the card. Other buttons include 'CANCEL REVIEW', 'TRANSFER REVIEW', 'VIEW FULL CLIENT RECORD', and '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**.



The screenshot shows a dialog box titled 'Assign this review for Jacquelyne Matson'. It contains a message: 'All fields marked with an asterisk (*) are required.' Below this is a dropdown menu labeled 'Change support plan review priority?' which is highlighted with a red box. Underneath is a list of assessors to assign the review to, each with a radio button and their assessment/review history. The list includes: 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), and Shani LEWIS (2 assessments and 1 reviews assigned). At the bottom right, there are 'ASSIGN' and 'CANCEL' buttons, with 'ASSIGN' highlighted by a red box.

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



The screenshot shows a green success banner with a white checkmark icon on the left and the text: 'You have successfully assigned this review to the assessor.' on the right. There is a small 'X' icon in the top right corner of the banner.

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.

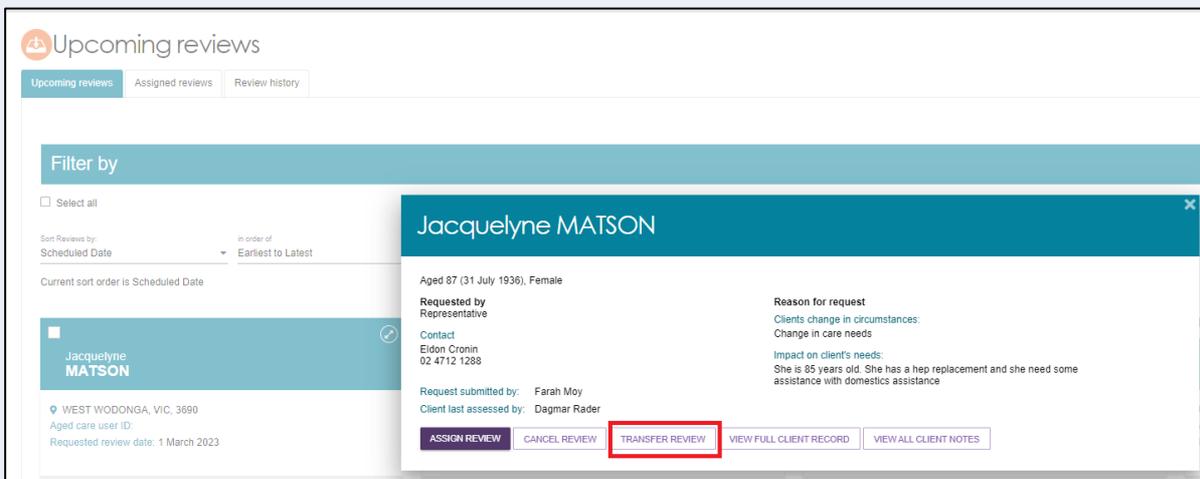
Transferring a Support Plan Review

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



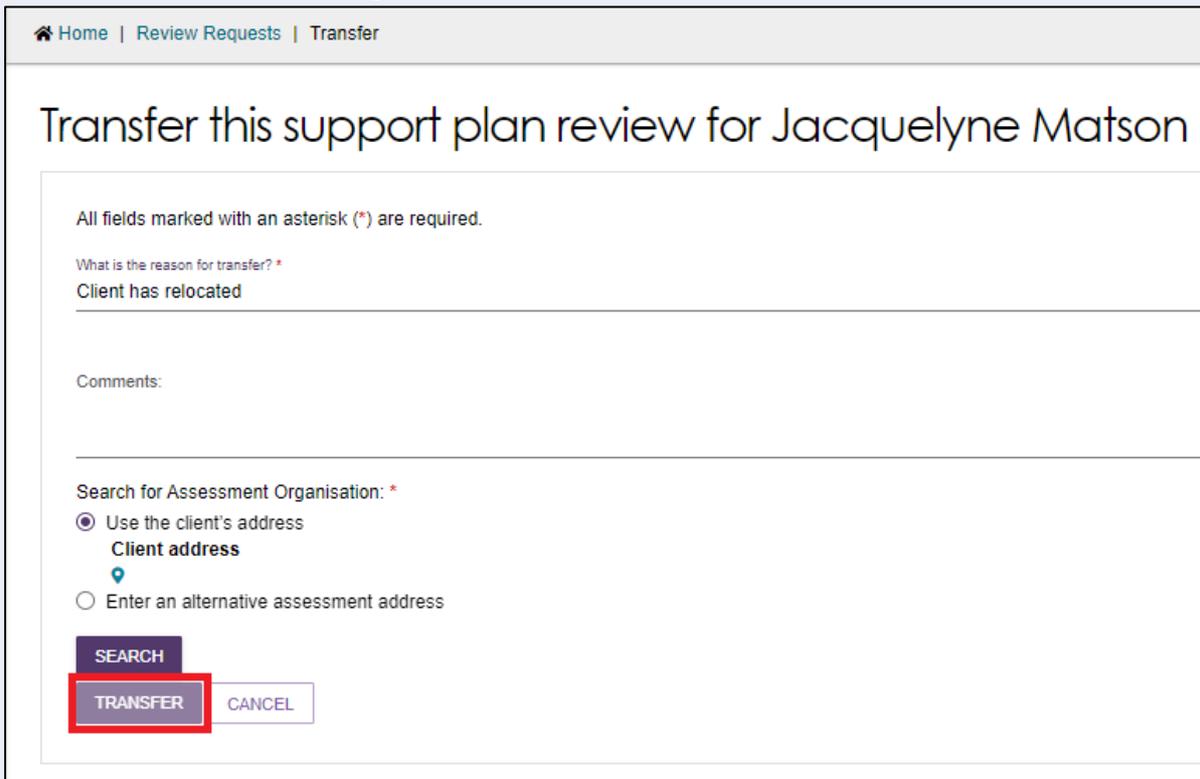
1. To begin transferring a Support Plan Review, go to **Upcoming reviews** and select the client card you wish to transfer for the Support Plan Review. Select **TRANSFER REVIEW**.

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



The screenshot shows the 'Upcoming reviews' section of a web application. At the top, there are tabs for 'Upcoming reviews', 'Assigned reviews', and 'Review history'. Below this is a 'Filter by' section with a 'Select all' checkbox and sorting options: 'Sort Reviews by: Scheduled Date' and 'In order of: Earliest to Latest'. A client card for 'Jacquelyne MATSON' is displayed, showing her age (87), gender (Female), and address (WEST WODONGA, VIC, 3690). The card also lists the requested representative (Eidon Cronin) and the reason for request (Clients change in circumstances: Change in care needs). At the bottom of the card, there are five buttons: 'ASSIGN REVIEW', 'CANCEL REVIEW', 'TRANSFER REVIEW' (highlighted with a red box), 'VIEW FULL CLIENT RECORD', and '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**.



The screenshot shows the 'Transfer this support plan review for Jacquelyne Matson' form. At the top, there are navigation links for 'Home', 'Review Requests', and 'Transfer'. The main heading is 'Transfer this support plan review for Jacquelyne Matson'. Below this is a form with the following fields and options:

- 'All fields marked with an asterisk (*) are required.'
- 'What is the reason for transfer? *' with the text 'Client has relocated' entered.
- 'Comments:' with a text area.
- 'Search for Assessment Organisation: *' with two radio button options:
 - Use the client's address
Client address
 - Enter an alternative assessment address
- 'SEARCH' button
- 'TRANSFER' button (highlighted with a red box)
- 'CANCEL' button

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.

The screenshot shows the 'Assigned reviews' interface. On the left, there are filter options for 'Sophia Hendrick' and 'Ilan TISDALE'. The main panel displays details for 'Ilan TISDALE', including age, gender, and location. Below this, there are sections for 'Requested by', 'Contact', 'Request submitted by', 'Client last assessed by', and 'Assigned to'. A 'Reason for request' section provides a detailed explanation of the client's needs. At the bottom of the panel, a row of buttons is visible, with 'REASSIGN REVIEW' highlighted by a red box.

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

The screenshot shows a dialog box titled 'Reassign this review for Lilly Field'. It contains a message: 'All fields marked with an asterisk (*) are required.' Below this, there is a section labeled 'Assign to:*' with two radio button options: 'Louis MONFORE (0 assessments and 0 reviews assigned)' and 'Joel SWIFT (3 assessments and 1 reviews assigned)'. The 'Joel SWIFT' option is selected and highlighted with a red box. At the bottom right of the dialog, there are two buttons: 'REASSIGN' and 'CANCEL'.

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 [My Aged Care - Assessor Portal User Guide 9 - Tasks and notifications](#).

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.

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 *

Details: *

0 / 255

CANCEL REVIEW REQUEST CANCEL

Canceling 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 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

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)

Choose a file...

Details: *

CANCEL REVIEW REQUEST CANCEL

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.

Upcoming reviews

Upcoming reviews Assigned reviews Review history

Filter by

Select all

Sort Reviews by: Scheduled Date In order of: Earliest to Latest

Current sort order is Scheduled Date

Jacquelyne MATSON

WEST WODONGA, VIC. 3690
Aged care user ID: AC05627757
Requested review date: 1 March 2023

Jacquelyne MATSON

Aged 87 (31 July 1936), Female

Requested by Representative
Contact
Eldon Cronin
02 4712 1288

Request submitted by: Farah Moy
Client last assessed by: Dagmar Rader

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

ASSIGN REVIEW CANCEL REVIEW TRANSFER REVIEW VIEW FULL CLIENT RECORD VIEW ALL CLIENT NOTES



- 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 review for Raymond Creenan

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

Change support plan review priority?
Urgent

Reason description: *
Change in carer availability

Assign to:*

- Dennis BOUY (11 assessments and 0 reviews assigned)
- Clarence CATRONE (0 assessments and 2 reviews assigned)
- Ernest CATRONE (2 assessments and 0 reviews assigned)
- Nathan CATRONE (2 assessments and 0 reviews assigned)
- Robert CATRONE (4 assessments and 0 reviews assigned)
- Samuel CATRONE (0 assessments and 0 reviews assigned)
- Edgar CONLAN (0 assessments and 0 reviews assigned)
- Will CONLAN (10 assessments and 0 reviews assigned)

ASSIGN CANCEL

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



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**.

The screenshot shows the 'Assessor Portal' interface. The main content area displays a list of assigned reviews for Norman Darga, including cards for Garfield MEHAN, Charlie CATRONE, and Steve Herrera. The Charlie CATRONE card is selected, and a modal window is open over it. The modal contains the following information:

- Client:** Charlie CATRONE, Aged 69 (13 August 1931), Female
- Requested by:** Representative N/A
- Reason for request:** Clients change in circumstances. Change in care needs. Impact on client's needs. And the heavens scowled and the huskys howled and the wind began to blow. He turns to me and Cap says he'll cash in this trip I guess. Then I made a hike for I didn't like to hear n 925481121
- Contact:** Arthur Conlan, 02 6752 6498
- Request submitted by:** Jessie Daiga
- Client last assessed by:** Ben Catrone
- Assigned to:** Frank Davidson

At the bottom of the modal, there are several buttons: REASSIGN REVIEW, CANCEL REVIEW, CHANGE PRIORITY (highlighted in red), VIEW FULL CLIENT RECORD, and VIEW ALL CLIENT NOTES.

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**.

This screenshot shows the 'Change support plan review priority for Charlie Catrone' modal. The 'Urgent' option is selected in the 'Select new priority' dropdown menu. The 'Reason description' field is visible and contains an asterisk, indicating it is a required field. The modal also shows a list of assigned reviewers on the right side, including Norman Darga (Urgent), Clarence Catrone, Claude Kearny, and Frank Davidson. At the bottom of the modal, there are buttons for CHANGE PRIORITY (highlighted in red) and CANCEL.

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

The confirmation message is displayed in a green box with a white checkmark icon on the left and a close button (X) on the right. The text reads: "You have successfully changed the priority of this review."