

Assessor Portal User Guide 1 - Registering and referring clients for assessment

This user guide is to assist aged care needs assessors (assessors) in using the My Aged Care assessor portal (assessor portal) or the Aged Care Assessor App (the App) to register clients and refer them for assessment.

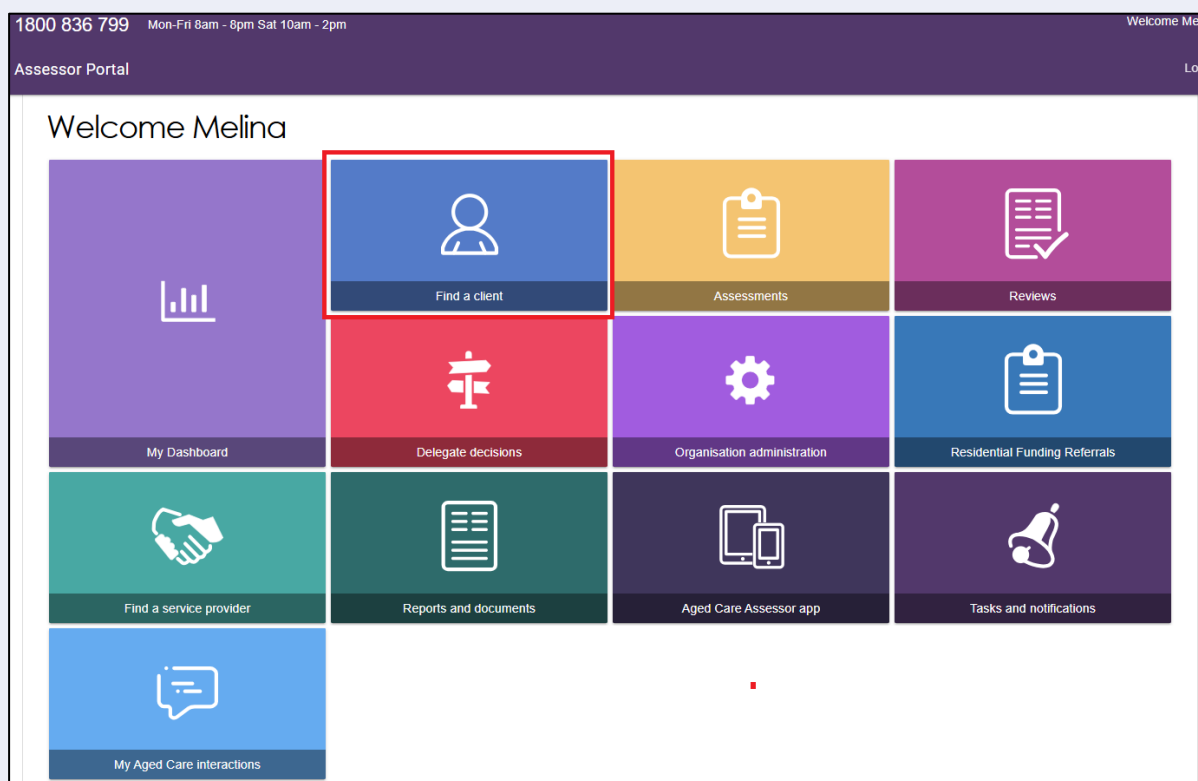
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Finding a client in the Portal

Before you register a person, you need to confirm that they do not already have a client record. Follow the steps below to determine if the client has an existing record.

1. Select **Find a client** from the home page.



2. Next, search for the client. There are two ways to search: Normal or Advanced.

Normal Search

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

Advanced Search

Alternatively, you can select **ADVANCED SEARCH** to conduct a custom or refined search.

The Advanced Search functionality allows you to search by additional fields, such as date of birth, Medicare number, suburb, etc. This filter can be applied across various sections within the portal. Choose the required filter item from the dropdown menu and select **ADD FILTER**.

The screenshot shows the 'Find a client' page with a sidebar and a main content area. The sidebar has a 'Find a client' header and a 'Search by' section with a 'Last name' input field, 'ADVANCED SEARCH' (highlighted with a red box), 'CLEAR FILTERS', 'SEARCH', and 'CLEAR' buttons. The main content area is titled 'Search clients' and contains a 'Clients' section. A dropdown menu is open, showing a list of search criteria: 'Choose an item.', 'Aged Care Management Payment System (ACMPS) number', 'Aged Care user ID', 'Centrelink Customer Reference Number (CRN)', 'Client status', 'Date of birth', 'Department of Veterans' Affairs (DVA) card number', 'First name', 'Home contact number', 'Last name', 'Locality', 'Medicare card number', 'Postcode', 'Preferred name', 'State', 'Suburb', and 'System for the Payment of Aged Residential Care (SPARC) number'. The 'ADD FILTER' button is highlighted with a red box.

You can save a filter for future use by choosing the item and selecting **SAVE FILTER**.

This will display the custom filter (shown below) so it can be easily accessed in the future.

To remove a filter, select the red **Recycle Bin** button next to the filter you wish to remove. You can choose to add that filter back again.

To apply your chosen settings, select the **FILTER** button.

The screenshot shows the 'Search clients' page with a sidebar and a main content area. The sidebar is the same as in the previous screenshot. The main content area is titled 'Search clients' and contains a 'Clients' section. A dropdown menu is open, showing the same list of search criteria as before. The 'SAVE FILTER' button is highlighted with a red box. Below the dropdown menu, it says '1 of 7 filters used'. A custom filter is listed: 'Centrelink Customer Reference Number (CRN)' with a red 'Recycle Bin' icon next to it. At the bottom right, the 'FILTER' button is highlighted with a red box.

When filters have been applied, the **Advanced Search** link changes to **MODIFY FILTER OPTIONS**.

The image shows a search interface with the heading "Search by". Below it are two input fields: "Last name" and "First name". Below these fields are two buttons: "MODIFY FILTER OPTIONS" (highlighted with a red box) and "CLEAR FILTERS". At the bottom are two buttons: "SEARCH" and "CLEAR".

Selecting **CLEAR FILTERS** will clear the information entered.

Selecting **CLEAR** will clear any current search results.

Any matching search results will be displayed.

The results will be shown either in Card view or List view, depending on your selection.

Example of card view

The image shows search results in card view. At the top, there's a search bar with "Last name" and "First name" fields, and a "SEARCH" button. Below the search bar, there's a "Last name is Smith" filter. The results are displayed as four cards, each representing a client. The cards are for Mike SMITH, Mary SMITH, Karl SMITH, and Mel SMITH. Each card shows the client's name, address, aged care user ID, and status (Deceased or Active). The "CARD" view button is highlighted with a red box.

Name	Address	Aged care user ID	Status
Mike SMITH	1/1 Sesame Street SYDNEY NSW 2000	AC85663847	Deceased
Mary SMITH	12/1 Sesame Street SYDNEY NSW 2000	AC12424131	Active
Karl SMITH	4 Privet Drive SURREY TAS 7999	61 2987 1234 AC93852184	Deceased
Mel SMITH	No address details found	AC47108998	Active

Example of list view

The image shows search results in list view. At the top, there's a search bar with "Last name" and "First name" fields, and a "SEARCH" button. Below the search bar, there's a "Last name is Smith" filter. The results are displayed as a table with columns: Last name, First name, Aged care user ID, Address, Locality, Status, and Home contact number. The "LIST" view button is highlighted with a red box.

Last name	First name	Aged care user ID	Address	Locality	Status	Home contact number
SMITH	Mike	AC85663847	1/1 Sesame Street	SYDNEY, NSW, 2000	Deceased	
SMITH	Mary	AC12424131	12/1 Sesame Street	SYDNEY, NSW, 2000	Active	
SMITH	Karl	AC93852184	4 Privet Drive	SURREY, TAS, 7999	Deceased	61 2987 1234
SMITH	Mel	AC47108998	No address details found	No address details found	Active	

Where there are multiple search results, please ensure you review the records first to determine the appropriate client.



Client summary

1. After selecting the appropriate client, the **Client summary** tab will display. This tab aims to provide a snapshot view of where a client is in their aged care journey. It contains key information of the client, such as Assessment information, Recommendations and approvals, Service delivery status, any concerns and goals and their statuses

Information will only be displayed where it is applicable to the client.

The screenshot shows the 'Client summary' page for Captain Roland MOSES. The page header includes the client's name, age, date of birth, and address. The primary contact is Roland Moses (self) with a phone number. The page has a navigation bar with tabs: Client summary, Client details, Support network, Approvals, Plans, Attachments, Services, My Aged Care interactions, Notes, and Tasks and Notifications. The 'Client summary' tab is active. The main content area is divided into sections: Assessments (Comprehensive Assessment), Recommendations and approvals (Meals, Residential Respite Care, Home Support, Assistive Technology, Home Modifications), Service delivery status (No referrals issued), Concerns (Difficulty in walking, Unable to perform household tasks), and Goals (To be able to walk long with minimal help, To be able to perform household task with minimum support). The 'Assessments' section shows a 'Comprehensive Assessment' with a status of 'Awaiting Delegate Decision on 16 May 2025'. The 'Recommendations and approvals' section shows 'Meals - Meal delivery, Meal preparation' with a status of 'No referrals issued'. The 'Service delivery status' section shows 'Residential Respite Care' with a status of 'Approval pending'. The 'Concerns' section shows 'Difficulty in walking for longer period of time' and 'Unable to perform household tasks' with a status of 'Status: In Progress'. The 'Goals' section shows 'To be able to walk long with minimal help' and 'To be able to perform household task with minimum support' with a status of 'Status: In Progress'. There is a 'SEE SERVICE DETAILS' button at the bottom of the Recommendations and approvals section.

2. If there are **No records returned** (as shown below), you can select **Register new client** for immediate assessment only.

! You must have the client's consent to successfully complete registration.

The screenshot shows the 'Find a client' search page. The page has a header with 'Home | Find a client'. The main content area is titled 'Find a client' and contains a search form. The search form has a 'Search by' section with three input fields: 'Last name' (containing 'Client'), 'First name' (containing 'Clara'), and 'Aged Care user ID'. Below the input fields are buttons for 'ADVANCED SEARCH' and 'CLEAR FILTERS'. Below these buttons is a summary of the search criteria: 'First name is Clara and Last name is Client'. Below the summary are buttons for 'SEARCH' and 'CLEAR'. At the bottom of the search form, it says 'No records returned for IMMEDIATE ASSESSMENT only: Register new client'. The 'Register new client' link is highlighted with a red box.

Registering a client in the Portal

1. After the search for a client returns no records (see above), the **Register a client** link will be displayed. Enter client details and select **REGISTER**.

Home | Client

Register a client

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

Personal details

Title: First name: Last name:

Gender:

Please enter the date of birth. If the date of birth is not known, please enter an estimated age in the Age field. This will then be used to automatically determine an approximate date of birth for the Client.

Date of birth: OR Age:
(e.g. dd/mm/yyyy)

Does the client identify as an Aboriginal or Torres Strait Islander? Does the client prefer a First Nations Assessment Organisation for their assessment?

☐ Consent to send SMS and emails about the client
Please enter email address and mobile phone number if available.

Email address:

Country code: Australia +61 Mobile phone number: Contact phone number:
(e.g. 02 1234 5678)

Identity match *

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

☒ This person has a Medicare card.

Medicare card number

4 digits: 5 digits: 1 digit: Reference:

☐ This person does not have a Medicare Card Number.

Government ID *

A government ID number will assist us with retrieving existing care approvals from Services Australia (if there are any).

☒ This person has a government ID (tick all that apply).

☐ Aged Care Management Payment System (ACMPS) number
☐ System for the Payment of Aged Residential Care (SPARC) number
☐ Department of Veterans' Affairs (DVA) card number
☐ Centrelink Customer Reference Number (CRN)

☐ This person does not have a government ID.

Consent

☐ Has the client consented to register? *

2. The details include Name, contact details, if the client identifies as Aboriginal or Torres Strait Islander, if the client prefers an Aboriginal and Torres Strait Islander Assessment Organisation (if available), Medicare number and status, government ID and status, and consent status.

Register a client

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

Personal details

Title: First name: Last name:

Gender:

Please enter the date of birth. If the date of birth is not known, please enter an estimated age in the Age field. This will then be used to automatically determine an approximate date of birth for the Client.

Date of birth: OR Age:
(e.g. dd/mm/yyyy)

Does the client identify as an Aboriginal or Torres Strait Islander?
Yes - Both

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

! Aboriginal and Torres Strait Islander assessment organisations will be standing up slowly over time to offer a choice for Aboriginal and Torres Strait Islander people from 1 November 2025. Over time, the service will extend its reach and work towards covering more areas across Australia.



! Remember to validate the address when you enter a new address or when you edit an existing address. This will ensure that any correspondence will be sent to the correct address, and that the client will be allocated to the correct address category (MMM Classification) for assessment purposes.

Edit client's Home address details

Enter Suburb and postcode and select from the list below *

WEST WODONGA, VIC, 3690

SUBURB IS NOT LISTED, CLICK HERE

Country *

Australia

VALIDATE THIS ADDRESS

Did you mean

- ☐ 1 HANLON Court WEST WODONGA VIC 3690
- ☐ 2 HANLON Court WEST WODONGA VIC 3690
- ☐ 3 HANLON Court WEST WODONGA VIC 3690
- ☐ 4 HANLON Court WEST WODONGA VIC 3690
- ☐ Not found, use entered address anyway: Milpara Unit 36 7 HANLON Court WEST WODONGA VIC 3690

Email and SMS Notifications

! Client email addresses and/or mobile phone numbers can be captured at registration.

You must have the client's consent to receive email and/or SMS notifications.

Clients and/or their supporters can nominate an email address and/or mobile phone number to receive notifications when they reach key stages of their My Aged Care journey.

To set up email and/or SMS notifications for a client at registration, select the **Consent to send SMS and emails about the client** checkbox and input an email address and/or mobile phone number.

☒ Consent to send SMS and emails about the client

Please enter email address and mobile phone number if available.

Email address:

Country code: Australia +61

Mobile phone number:

Contact phone number: (e.g. 02 1234 5678)

Email and/or SMS notification preferences can be viewed or modified on the **Client details** tab in the assessor portal. Refer to the [My Aged Care – Assessor Portal User Guide 2 – Registering support people and adding relationships](#) for information about enabling email notifications for existing clients and supporters.

Registering or assessing a client in the App

If you are using the App and you need to undertake an assessment for a client who has not been referred to your organisation, you can use the **Add offline client** function. See the [Aged Care Assessor App User Guide](#) for this process.

When you are reconnected to the Internet, you will need to register the client if they do not have an existing record and facilitate a referral for assessment via the contact centre before linking the offline client to the registered record.

Verifying a client's identity

1. From the Client Record in **Find a client**, you can verify the client's identity by selecting **Conduct a wallet check now**. The wallet check can also be conducted through the App or at other stages of the assessment.

Assessor Portal

Home | Assessments | Roger HUNT

Mr Roger HUNT
Male, 85 years old, 1 January 1940, AC75673061
YARADHANG, 23 FURZER STREET PHILLIP, ACT, 2606

Primary contact: Roger Hunt (self)
No support relationships recorded

Client summary REFER THIS CLIENT FOR ASSESSMENT VIEW CLIENT

Warning: We still need to check the client's ID in person (a wallet check). Please verify the client's identify when you next see them (two pieces of ID such as a Medicare or Health card bill or other membership) Conduct a wallet check now

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

2. A dialog box appears. Select the appropriate scenario and then select **SAVE DETAILS**.

If you select **My client has identification**, you will then be prompted to enter two types of ID and the date that you have performed the check.

If you select **My client has no valid identification this time**, you will then be prompted to ask the client for ID in the future.

If you select **My client will be unable to produce valid identification**, you will not be prompted to ID-check this client in the future.

Wallet check

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

Client wallet check:*

☐ My client has identification

☐ My client has no valid identification this time

☐ My client will be unable to produce valid identification

SAVE DETAILS CANCEL

Self-referring a client

- ! 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 [My Aged Care Assessor Portal User Guide 12 – Managing Delegate Roles](#).

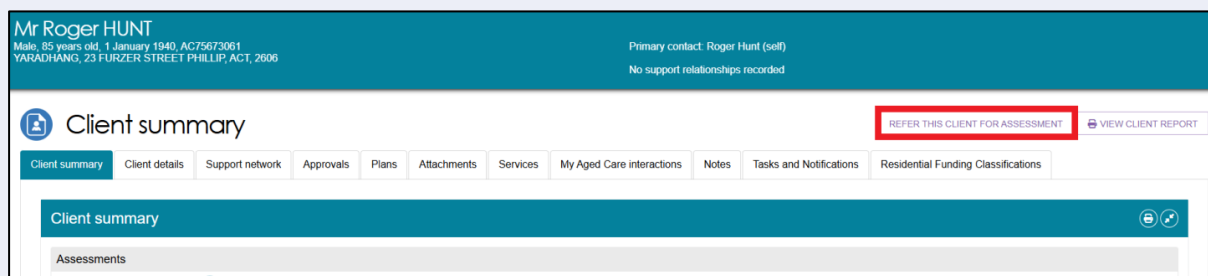
- ! Assessors can self-refer clients for assessment as long as the assessment type is support by their outlet. For example, non-clinical aged care needs assessors (non-clinical assessors) can self-refer for both Home Support and Comprehensive assessments if their outlet supports both assessment types.

- ! On 1 November 2025, the *Aged Care Act 2024* and the Support at Home program come into effect with significant change to support plans in the IAT.

To ensure the right IAT is used, and triage can continue for priority referrals, any assessments in the **Triage complete, main assessment not started** status already started prior to 1 November 2025 and in progress on 1 November 2025 must be restarted.

For information on the **Restart Assessment Process**, please refer to *Management of active assessments for 1 November 2025 transition – Standard Operating Procedure* and *Restarting In Progress Assessments for Support at Home* (instructional video).

1. From the Client record in **Find a client**, you can self-refer the client for assessment by selecting **REFER THIS CLIENT FOR ASSESSMENT**.



2. In the pop-up box you will need to:
 - assign the client to Myself or to My Organisation (for guidance on when to refer to yourself or your organisation, see the [My Aged Care Assessment Manual](#))
 - select the assessment type (comprehensive or home support)
 - select the outlet for this referral
 - select the assessment setting (for comprehensive assessments only)
 - choose the assessment priority rating (High, Medium, Low)
 - the reason for self-referring (remote assessment, first nations, in-hospital, homeless or at risk of or vulnerable).
3. Then, select **CREATE REFERRAL**.

Refer client for assessment

If the client has a scheduled, submitted or assigned Support Plan Review, by referring the client for a new assessment, the scheduled, submitted or assigned Support Plan Review will be cancelled when the new assessment has been accepted by the Assessment Organisation.

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

An Aged Care Assessment referral will be created for Aadi Smith.

Assign this referral to*

☒ Myself
☐ My Organisation

Please select the assessment type *

Comprehensive Assessment

Please select outlet for this referral *

Assessment setting:* ?

☐ Hospital
☒ Non-Hospital

Priority: * ?

Low

Reason for self-referring *

CREATE REFERRAL
CANCEL

3. Please note: **ASSESSMENT SETTING** option will not be available for **HOME SUPPORT ASSESSMENT**.

Refer client for assessment

If the client has a scheduled, submitted or assigned Support Plan Review, by referring the client for a new assessment, the scheduled, submitted or assigned Support Plan Review will be cancelled when the new assessment has been accepted by the Assessment Organisation.

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

An Aged Care Assessment referral will be created for Alek Hardison.

Assign this referral to*

☒ Myself
☐ My Organisation

Please select the assessment type *

Home Support Assessment

Please select outlet for this referral *

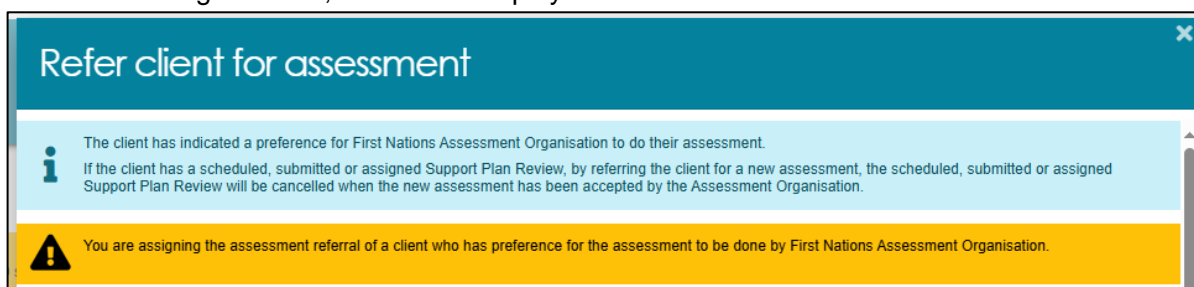
Priority: * ?

Low

Reason for self-referring *

CREATE REFERRAL
CANCEL

- ! If the client prefers their assessment to be completed by an Aboriginal and Torres Strait Islander Assessment Organisation, this will be displayed in both the blue banner and the amber banner.

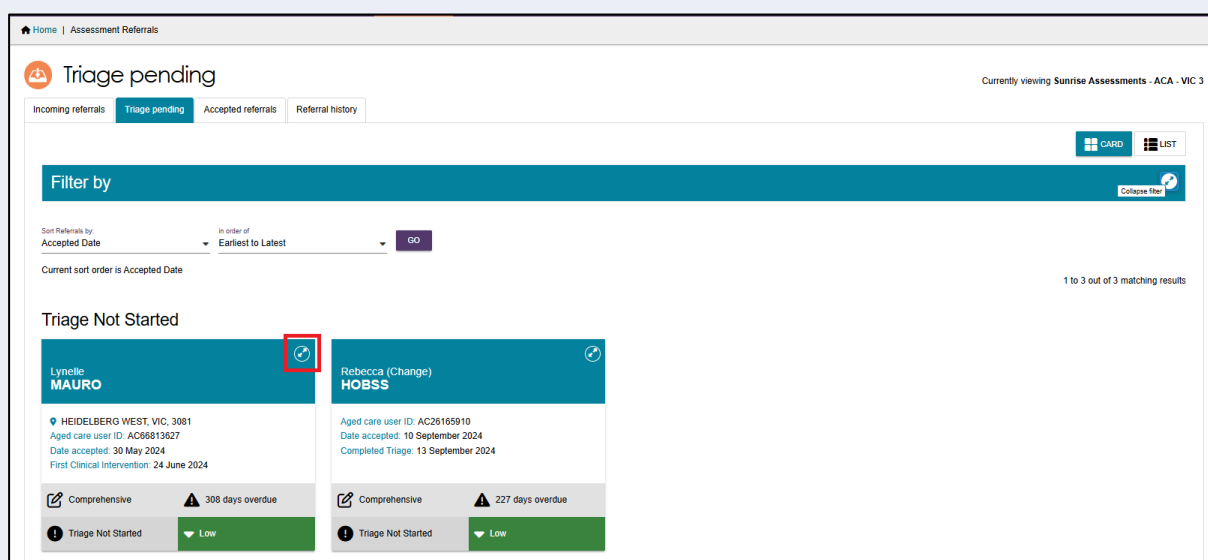


! **Cohabitants**

If you identify a potential client with aged care needs that is cohabitating with the current client at the time of the assessment, you may wish to encourage that person to contact My Aged Care to request screening which will determine eligibility for an assessment referral. For more information, please refer to [Facilitating a referral for a potential client](#).

4. If you have selected to assign the referral to yourself, you will then be re-directed to the **Current assessments** page. To complete the assessment, you must first undertake triage.

To begin triage, select the expand button at the top right of the client card.



5. Next, select **START TRIAGE** and complete the relevant consent and demographic fields.

For information on how to complete a triage, refer to the [My Aged Care – Assessor Portal User Guide 3 – Managing Referrals for Assessment and Support Plan Reviews](#).



Lynelle MAURO

Preferences

No preference was recorded

Assessment details

Assessment type Comprehensive

Assessment reason Reme 1D8CE671

Assessment setting Non-Hospital

Support plan review 27 May 2024

Support plan 6 August 2019

Home Support Assessment 3 August 2020

Home Support Assessment 21 May 2019

This assessment referral has been generated from a support plan review where it has been identified that the client requires a new assessment.

First Clinical Intervention due by 24 June 2024

Client story

28/06/2024

And I burrowed a hole in the glowing coal, and I stuffed in Sam McGee 0BDD757073 There is never a de

27/05/2024

He turns to me and Cap says he Ill cash in this trip I guess D8EF367647 Before I got married I had six theories about bringing

[VIEW ALL 10 CLIENT NOTES](#)

Comments

[VIEW FULL CLIENT RECORD](#)

[VIEW CLIENT REPORT](#)

[START TRIAGE](#)

[REASSIGN](#)

[REFER URGENT SERVICES](#)

[REJECT](#)

[TRANSFER](#)

[FLAG AS END-OF-LIFE](#)

6. If you have assigned the referral to **Yourself** and you are also a Triage Delegate, you can complete triage and then proceed to the assessment using the IAT.

If you have selected to assign the referral to **Yourself** and you are not a Triage Delegate, then you will only be able to complete triage with the supervision of a Triage Delegate. This must be captured in the portal at the time of triage.

To record the details of your supervision, at the bottom of the triage questions is a **Details of the supervised Triage** section. Select the relevant supervisor and then select **SAVE TRIAGE**. You will then be able to proceed with completing the assessment using the IAT.

Mrs Miriam DAVIS

Female, 89 years old, 31 October 1935, AC29009883
Prefers to speak Greek

Does the client require urgent service provision (direct to service)? *

Yes

No

Outcome/advice for assessment notes

0 / 500

Details of the supervised Triage

Triage supervised by *

For more information on completing a supervised triage, refer to the [My Aged Care Assessment Manual](#).



Facilitating a referral for a potential client

A client referral must be assigned to you in the assessor portal before you can complete an assessment for that client. If the potential client has aged care needs that is cohabitating with the current client at the time of the assessment and who has not been referred to you, follow the steps below.

1. Encourage the person to contact My Aged Care contact centre on 1800 200 422 to request screening which will determine eligibility for an assessment referral.
2. Once eligibility is determined, a team leader will need to accept the referral in the assessor portal.
3. A Triage Delegate will then need to complete triage.
4. Following this the Triage Delegate or a Team Leader can then assign it to an assessor.
5. If the referral is assigned to you, it will appear in your **Current assessments** list in the **Assessments** tile. From here, you will be able to begin the assessment.

The screenshot displays the 'Current assessments' section of the assessor portal. The page title is 'Current assessments' and it indicates 'Currently viewing: AGED CARE'. There are tabs for 'Current assessments' and 'Recent assessments'. A 'Filter by' bar is present, with a dropdown menu set to 'Assessment Priority' and a 'GO' button. Below the filter bar, it says 'Current sort order is Assessment Priority' and '1 to 2 out of 2 matching results'. Two assessment cards are shown, both under the 'Assessment Not Started' filter. The first card is for 'Mark JUNE' with 'Aged care user ID: AC15704125', 'Date accepted: 20 September 2024', and 'Completed Triage due by: 23 September 2024'. It is marked as 'Comprehensive' and 'Due in 3 days'. The second card is for 'Fred DENNI' with 'Aged care user ID: AC60735827', 'Date accepted: 19 September 2024', and 'Completed Triage due by: 22 September 2024'. It is also marked as 'Comprehensive' and 'Due in 2 days'. Both cards have a status of 'Assessment Not Started' and a priority level (Medium for Mark JUNE and Low for Fred DENNI). A red box highlights the first card for Mark JUNE.