

Assessor Portal User Guide 11 - Assessment Delegate Support Role

The Delegate Support role in the My Aged Care assessor portal (assessor portal) enables anyone assigned the role to perform administrative functions to support the Assessment Delegate. For example, the Assessment Delegate Support will be able to print support plans, as well as generate, print and upload referral code letters and approval letters. The Assessment Delegate Support operates under the instructions of the Assessment Delegate.

Clinical Assessment Delegates are able to approve an older person for all service groups, classification types and classification levels under the *Aged Care Act 2024*. Non-clinical assessment delegates are restricted to approving entry level home support, Assistive Technology (AT) or Home Modification (HM) services (i.e. with classification levels of CHSP class, AT CHSP or AT-HM).

! From 1 November 2025, there are changes to assessment delegations under the *Aged Care Act 2024*, for both Clinical and Non-clinical Assessment Delegates.

To understand **Assessment Delegate changes**, refer to 'Chapter 7: Delegations and Approvals under the Act' of [My Aged Care Assessment Manual](#).

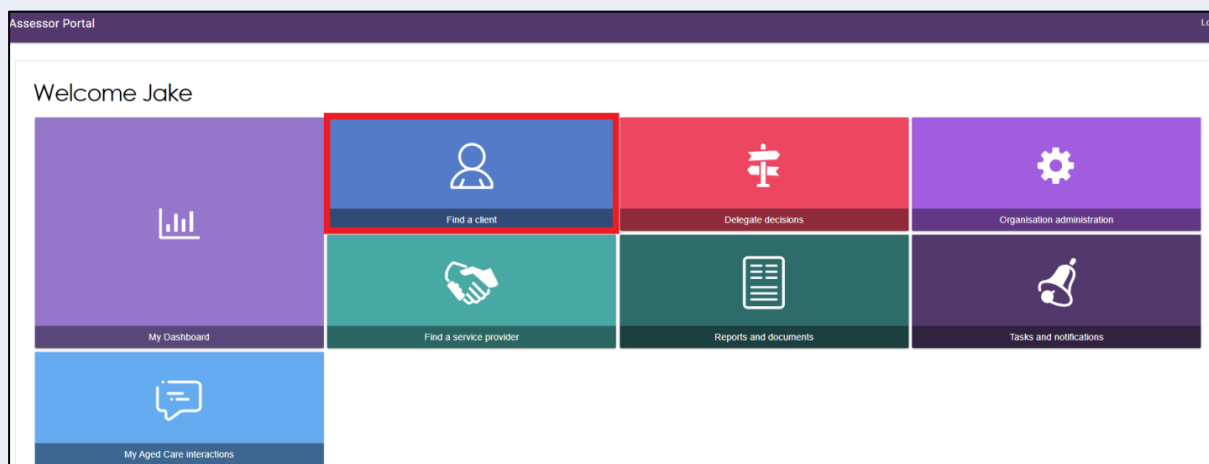
For guidance on the interim process explaining **Manual Delegate Approval for CHSP only** for **comprehensive** and **home support assessments**, and how it impacts Clinical and Non-clinical Assessment Delegates from 1 November 2025, refer to *Manual Delegate Approval for CHSP – Standard Operating Procedure* and instructional videos for comprehensive and home support assessments.

This guide contains the following topics:

Accessing client information	2
Printing the support plan and generating referral code letters	4
Printing approval/non-approval letters.....	5

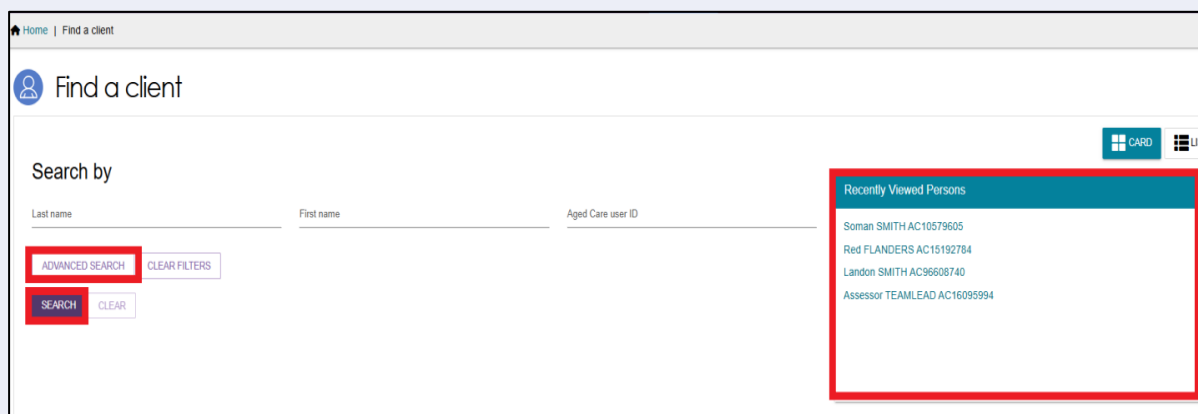
Accessing client information

1. To locate information about a client and print a copy of the client record, select the **Find a client** tile from your homepage.

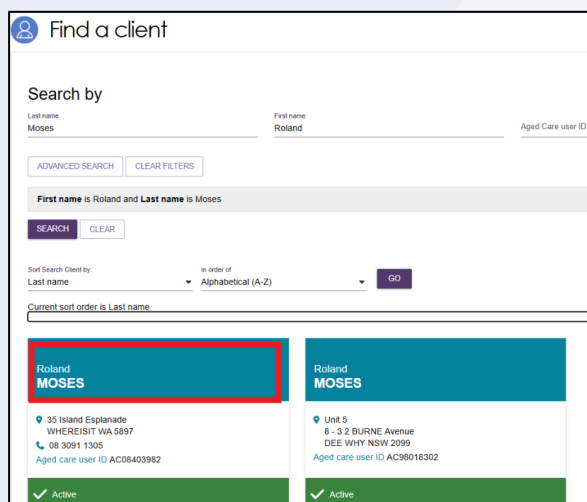


2. Use the **Find a client** function to search for the client. Client records you have recently viewed will appear in the **Recently Viewed Persons** section, and depending on your browser, this will either appear on the right side or the bottom section of the page.

The **ADVANCED SEARCH** functionality allows you to search by additional fields. Refer to the [My Aged Care – Assessor Portal User Guide 1 – Registering and referring clients](#) for more information on using this functionality.



3. Any matching search results will be displayed. Select the client's name.



4. You will be able to sort the matching results by a number of criteria including last name, first name, Aged Care User ID, suburb, state, post code, date of birth and more. Select the criteria, the order of display as required and select **GO**.

Find a client

Search by

Last name First name

ADVANCED SEARCH CLEAR FILTERS

SEARCH CLEAR

Sort Search Client by: Last name in order of Alphabetical (A-Z) GO

Last name
First name
Aged Care User ID
Suburb
State
Post code
Date of birth
Client status
Home Contact

Unit 5
8 - 3 2 BURNE Avenue
DEE WHY NSW 2099
Aged care user ID AC98014

Active

5. Selecting the client's name tile will take you to the Client Summary. You can view and print a RTF (Rich Text File) of the client record by selecting the **VIEW CLIENT REPORT** button.

Captain Roland MOSES
Male, 65 years old, 14 June 1959, AC08403982
35 ISLAND ESPLANADE WHEREISIT, WA, 5897

Primary contact: Roland Moses (self) - 08 3091 1305
View support network

Client summary

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

Client summary

Assessments

Comprehensive Assessment
Awaiting Delegate Decision on 16 May 2025
Happy Assessments - ACA - VIC 4 02 2404 7561

Recommendations and approvals

Meals - Meal delivery, Meal preparation

Service delivery status

No referrals issued

Help at home - Entry level support (Commonwealth Home Support Programme)
Aged care (nursing) home (Residential Care)
Support at Home

Residential Respite Care
Approval pending

View support at home letters

VIEW CLIENT REPORT

6. A **Generating Report** pop up appears, then the Rich Text File (RTF) appears on your browser ready to be downloaded or opened.

Generating report. You will be redirected to the Reports page if the request takes longer than expected...

Downloads

AC08403982 Roland Moses Client Record Snapshot May 2025.RTF

Open file

See more

7. Opening the RTF shows a Copy of the Client Record.



Roland Moses
Aged Care ID: AC08403982
Date of Birth: 14/06/1939

Client Details

Age 85 **Gender** Male

Medicare number not applicable **DVA Card number** not applicable

Address 35 Island Esplanade, WHEREISIT, WA, 5897, Australia

Lives With	Lives alone	Accommodation type	Independent Living
Phone – Home	+610830911305	Phone – Mobile	+610418357043
Email	captainmoses@hotmail.com		
Preferred phone	Home	Fax	not applicable
Country of Birth	England	Preferred correspondence method	not applicable
Preferred Language	English	Ethnicity	British
TIS Required	not applicable	Requires Help to Communicate	not applicable
Marital status	Widowed	NRS Required	N
		Aboriginal and/or Torres Strait	No - Neither

Printing the support plan and generating referral code letters

1. To view and print the support plan, navigate to the **Plans** tab in the client record. From here, select **SUPPORT PLAN**.

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[View support network](#)

Plans

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

Current Episode
Episode ID: 2-213LWWS
16 May 2025 - Present
SUPPORT PLAN

Recommendations

- Residential Respite Care

Upcoming Review(s)
No upcoming reviews scheduled

Assessment history

- Comprehensive Assessment 16 May 2025
- Screening 16 May 2025

Plan history
No plan history available

Review history

2. The **Goals & recommendations** tab will be displayed. You can print a copy of the support plan by selecting **PRINT COPY OF SUPPORT PLAN**.

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Support plan and services

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

PRINT COPY OF SUPPORT PLAN

IAT Outcome and Classifications

Current assessment type: Comprehensive Assessment

IAT Outcome: SaH Classification 1

Recommended classification: AT Medium

HM Medium

Override reason: Higher level service needs

Override reason description: Change in needs. Require higher level of care

Client concerns and goals

Concern: Unable to perform household tasks

Goal: To be able to perform household task with minimum support



3. Navigate to the **Manage services & referrals** tab. From here, you can view the client's service referrals and generate a copy of the referral code letter.

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Support plan and services

Identified needs | Goals & recommendations | Decisions | **Manage services & referrals** | Associated People

Services not yet in place

Help at Home

Meals

- Meal delivery
- Meal preparation

[FIND PROVIDERS](#)

Low
Associated with goal(s): To be able to perform household task with minimum support
Recommended By: Obadiah Edmondson
User Type: Assessor

Not actioned

Aged Care Homes

Residential Respite Care

High

Not actioned

Printing approval/non-approval letters

1. To generate and print approval or non-approval letters, navigate to the **Decisions** tab in the client record. At the bottom of the page, you will be able to generate the Approval or Non-Approval letter.

Support plan and services

Identified needs | Goals & recommendations | **Decisions** | Manage services & referrals | Associated People

IAT Outcome and Classifications

Current care approvals

Residential Respite Care

Priority for this care type: High ?

Approval starts: 27 May 2025

Declaration: Yes

Reason DEMMI not completed: information unavailable. Need to follow up in 1 week

Source system: Gateway

Residential Permanent

Urgency for this care type: Medium ?

Approval starts: 27 May 2025

Source system: Gateway

Delegate decisions and comments

Assessed on 26 May 2025

[GENERATE APPROVAL LETTER](#) [UPLOAD APPROVAL LETTER](#)

[REQUEST/CHANGE NOTIFICATION OF HOME CARE/SAH CORRESPONDENCE](#) [RETURN TO CLIENT](#)

2. You will be asked to enter information in a pop-up modal regarding the assessment and the evidence supporting the approved care types. This information will display in the approval letter. Select **GENERATE APPROVAL LETTER** button.

Generate approval letter

Evidence

Name of the qualified medical professional your medical information provided by (insert name of qualified medical personnel)

☐ Assessment information indicates you need help to perform daily living tasks

☐ Assessment information indicates that you require assistance to make decisions about your living activities and arrangements

☐ Assessment information which indicates that you would benefit from increased social and community participation

Other evidence as reason for care approval

GENERATE APPROVAL LETTER CANCEL

3. A processing screen will pop-up as shown below.

ated People

Review

Generating report. You will be redirected to the Reports page if the request takes longer than expected...

receive

home support

! Like any reviewable decision, ensure that the decision letter includes:

- the decision
- the reason for the decision
- the supporting evidence
- the right of review.

This is to ensure the high quality and consistency in letters that clients receive.

4. You will be redirected to the **Reports** tab of the **Reports and documents** page where you will be able to select **View** to download a copy of the letter for signing.

Reports and documents

Reports Forms Links

My Reports

Name	Requested Date	Status
Roland Moses Delegate Approval Letter Template 27 May 2025	27 May 2025	Ready View



! Certain user generated documents, including Approval/Non-Approval letters and Referral Code letters will only be retained in **Recently Requested Reports** for seven days, after which they will be cleared from this screen. They can be regenerated as per the original process.

5. Opening the file shows a copy of the approval letter.



 Australian Government |  myagedcare

Roland Moses
35 ISLAND ESPLANADE,
WHEREISIT,
SA, 5897 |

The Commentary in red italics is included to assist the delegate, please delete prior to finalising.

Complete or choose best option when text appears in [bold].

Aged Care ID: **AC08403982**

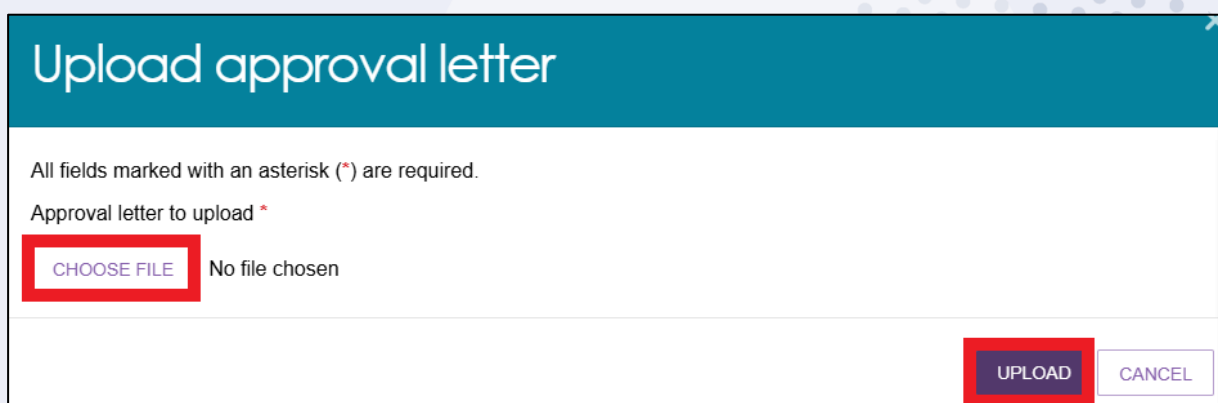
You have received this letter because you applied for aged care services funded by the Australian Government. This letter explains what services you are eligible for and how to access them. If you have a registered supporter who is authorised to receive letters for you, they will get a copy of this letter.

OR

You have received this letter because you are authorised to receive information about an older person who has applied for funded aged care services. This is a copy of the letter sent to the older person.

6. The Assessment Delegate has signed the letter, you can use the **Upload approval letter** button in the **Decisions** tab of the support plan to upload the letter to the client's record. Alternatively, you can upload this through the **Attachments** tab on the client record.

! The system supports a maximum file size of 5MB. Using Rich Text Format (RTF) files may exceed this limit. To avoid this issue, it is recommended to convert your files to PDF or DOCx formats.



Upload approval letter

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

Approval letter to upload *

CHOOSE FILE No file chosen

UPLOAD **CANCEL**

7. A green banner will be displayed upon successful uploading.



Your attachment has been successfully uploaded. You'll be able to find it on the attachments screen.

8. This document will be stored under the **Attachments** tab.

Attachments

Client summary Client details Support network Approvals Plans **Attachments** Services My Ag

Attachments

ADD AN ATTACHMENT

Assessment Attachments Other Attachments Correspondence

Approval Letter Sent to Client

[Roland Moses Delegate Approval Letter Template 27 May 2025.docx.docx \[90.13KB\]](#) [HIDE FROM VIEW](#)