

Assessor Portal User Guide 8 - Referring for services

A client may require services to support their needs as a result of an assessment.

Aged care needs assessors (assessors) may refer the client (with consent) for service recommendations made in the client's support plan, based on the client's preferred service provider (or prioritised list of service providers) and location preferences.

They can then send electronic referrals for services or provide the client with a referral code that allows them to visit providers prior to selecting their preferred provider.

! For CHSP only: For guidance on the interim process explaining Manual Delegate Approval for CHSP only for comprehensive and home support assessments, and how it impacts assessors during issuance of referral code(s) and support plan finalisation from 1 November 2025, refer to *Manual Delegate Approval for CHSP – Standard Operating Procedure* and instructional videos for comprehensive and home support assessments. This is available from your Assessment Organisation (via *Assessment and the new Aged Care Act* Sharepoint page).

Contents

Referral Types.....	2
Sequential Mode	2
Broadcast Mode	2
Referral Codes	2
No Care Approval.....	3
Issuing a referral for service	3
Recalling a referral	13
Issuing a referral code.....	14
Viewing Delegate decisions	17
Referring for Support at Home services.....	18
Referring Support at Home services with the Support at Home Priority System	20
Managing rejected service referrals.....	22

Referral Types

For service recommendations made in the client's support plan, you can search for and match a client to a preferred service provider (or prioritised list of service providers) based on the client's preferred location and/or preferences.

! You must obtain consent from the client and/or their supporter guardian prior to issuing a referral. This is complete by using the referral for services components of the My Aged Care Assessment Consent Form, which is available for download in the Documents & Reports tile in the My Aged Care assessor portal (assessor portal).

There are three types (modes) of referrals. You can:

- send a Sequential referral for service
- send a Broadcast referral for service or
- provide the client with a referral code that allows them to visit providers prior to selecting their preferred provider.

You can also decline to refer, by issuing a "No Care Approval".

! **For CHSP only:** From 1 November 2025 under the Manual Delegate Approval for CHSP interim process, **No Care Approval** can be used to add CHSP services for comprehensive assessments.

Sequential Mode

The assessor will send the client's referral to their chosen provider/s in the order of their preference. The client can limit their preference to one or more providers. If their first preference is not available, the referral is automatically sent to the next preference.

! From 1 November 2025, All Residential Permanent service referrals are only sent via Broadcast mode.

Broadcast Mode

The assessor will send the client's referral to all available providers. In agreeing to a broadcast referral, multiple providers could contact the client to see if they can provide them with the service/s. If a provider accepts their referral, the other provider/s will no longer see their information.

Referral Codes

For **residential aged care services**, assessors will normally generate a referral code for the client rather than issuing an electronic referral to service through the assessor portal. If a client has indicated preference or has been in discussions with particular provider/s, assessors can issue an electronic referral.

For **Support at Home**, once a client is assigned a Home Support service from the Support at Home Priority System, they will also be assigned a referral code. This code will be mailed to the

client with their service assignment/upgrade letter. Alternatively, assessors can provide this code (available in the client's support plan) to the client to allow them to visit Support at Home program providers prior to selecting their preferred provider. In addition, where the client has indicated a preference or discussed options with a Support at Home provider, assessors can issue an electronic referral.

No Care Approval

If you have recommended 'No Care Approval' due to the client withdrawing their application for care or not wishing to apply for care under the Act, you can select **COMPLETE SUPPORT PLAN AND CONTINUE TO MATCH AND REFER** from any tab in the client's support plan.

COMPLETE SUPPORT PLAN AND CONTINUE TO MATCH AND REFER

! From 1 November 2025, there are changes to how the No Care Approval option is used under the interim Manual Delegate Approval process for CHSP only approvals for comprehensive assessments.

For more information on the detailed interim process, please refer to *Support at Home – Manual Delegate Approval for CHSP – Standard Operating Procedure* and instructional videos for comprehensive assessments. This is available from your Assessment Organisation (via *Assessment and the new Aged Care Act* Sharepoint page).

Issuing a referral for service

! PRIOR CONSENT REQUIRED

You must obtain consent from the client or their supporter guardian in their support network prior to issuing a referral. You should use the My Aged Care Assessment Consent. The Consent includes the consent scripts and fields to record the consent for service referrals. It is located via the Reports and documents tile within the assessor portal.

1. When you have finished developing the support plan with the client, select **COMPLETE SUPPORT PLAN AND CONTINUE TO MATCH AND REFER**.

The screenshot shows the 'Other recommendations' section of the My Aged Care assessor portal. At the top, there is a 'View support network' link. Below it, there is an 'ADD A GOAL' button and a goal entry: 'Goal: To be able to perform household tasks'. Under the 'Other recommendations' heading, there are four buttons: 'ADD A GENERAL RECOMMENDATION', 'ADD A SERVICE RECOMMENDATION', 'RECOMMEND A PERIOD OF LINKING SUPPORT', and 'RECOMMEND A PERIOD OF REABLEMENT'. Below these buttons, there are two recommendation entries: 'Recommend that the client receive Allied health and therapy' (dated 21 May 2025) and 'Recommend that the client receive Comprehensive Assessment'. At the bottom of the form, there are two buttons: 'COMPLETE SUPPORT PLAN AND CONTINUE TO MATCH AND REFER' (highlighted with a red box) and 'RETURN TO CLIENT'.

2. You will be taken to the **Manage services & referrals** tab. The services added in the **Goals and recommendations** tab of the support plan will be displayed under **Services not yet in place**. Select **FIND PROVIDERS** to search and create electronic referrals for services.

Services not yet in place

Help at Home

☒ Deselect all Help at Home

☒ Domestic assistance Low Not actioned

No associated goals

Recommended By: Obadiah Edmondson

User Type: Assessor

FIND PROVIDERS ISSUE REFERRAL CODE REMOVE THIS SERVICE RECOMMENDATION

Below is an example of a client assessed for Support at Home services:

ters to speak Vietnamese No support relationships recorded

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

Services not yet in place

Support at Home

Support at Home Funding pending

Home support Ongoing - SaH Classification 8

- Funding pending
- Assistive technology Short-term - AT Medium
- Funding pending
- Home modifications Short-term - HM Medium
- Funding pending

No associated goals

Recommended By: Africa Green

User Type: Assessor

SEE SERVICE DETAILS

REQUEST/CHANGE NOTIFICATION OF HOME CARE/SAH CORRESPONDENCE **FINALISE SUPPORT PLAN** RETURN TO CLIENT

3. To search for multiple services at the same time, select the services you wish to search for and click **FIND HELP AT HOME PROVIDERS**.

☒ Deselect all Help at Home

☒ Domestic assistance Medium Not actioned

- General house cleaning
- Laundry services
- Shopping assistance

Associated with goal(s): To be able to perform household tasks

Recommended By: Obadiah Edmondson

User Type: Assessor

FIND PROVIDERS ISSUE REFERRAL CODE REMOVE THIS SERVICE RECOMMENDATION

☒ Allied health and therapy Low Not actioned

No associated goals

Recommended By: Obadiah Edmondson

User Type: Assessor

FIND PROVIDERS ISSUE REFERRAL CODE REMOVE THIS SERVICE RECOMMENDATION

FIND HELP AT HOME PROVIDERS

4. A page will be displayed that displays the services you ticked in the previous step. It allows you to enter the search criteria for the service. Depending on the service type you are searching for, the search criteria may include, but not necessarily be limited to, the following:

- The list of services that are available for the service type selected, to further refine the search for a specific client need. For example, the 'shopping assistance' service under the 'Domestic assistance' service type.
- The client's service delivery address for location-based searches
- Preferred service delivery setting: client location or service provider location
- Direct search for service providers by name or by proximity on a map.

Depending on the service selected, a location search may either be region/area based (e.g. domestic assistance services delivered to the client's home) or proximity based (e.g. a centre or facility).

Detailed search options are available, including whether the client has previously received services with the service provider, or any specialisations required to cater for a client's diverse or specialised needs.

Choose service provider for Larry Yindi

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

Service Finder

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

Locate these services:

Residential Respite Care
No associated goals

Using this location or service provider name:
☐ Use the client's address ☐ Enter a suburb/postcode ☐ Enter a service provider name ☐ Select a location

Diverse needs: ?
☐ Aboriginal and/or Torres Strait Islander peoples and communities
☐ People who live in rural or remote areas
☐ Veterans
☐ Care-leavers
☐ Lesbian, gay, bisexual, transgender and intersex people
☐ Culturally and linguistically diverse
☐ Financially or Socially disadvantaged people
☐ Homeless or at risk of becoming homeless
☐ Parents separated from their children by forced adoption or removal

Specialised services: ?
☐ Dementia
☐ Caters for cultural, spiritual or ethical food requirements
☐ Terminal illness

Preferred language chosen:
Preferred client language +

Using the following advanced options:
☐ Previously used by client ☐ Show only funded services

SEARCH CANCEL

5. For Support at Home services, you are able to search for service providers by specific attributes including Diverse needs, Specialised services, Language, Culture, Religion, Out of Hours service and Case management availability.

Service Finder

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

Locate these services:

Domestic assistance

☐ Shopping assistance ☒ General house cleaning

☐ Laundry services

No associated goals

Using this location or service provider name:*

☒ Use the client's address ☐ Enter a suburb/postcode ☐ Enter a service provider name ☐ Select a location

Client address
225 4 ROCKY POINT Road
RAMSGATE NSW 2217

Diverse needs: (?)

☐ Aboriginal and/or Torres Strait Islander peoples and communities

☐ People who live in rural or remote areas

☐ Veterans

☐ Care-leavers

☐ Lesbian, gay, bisexual, transgender and intersex people

☐ Special focus on people with a terminal illness

☐ Culturally and linguistically diverse

☐ Financially or Socially disadvantaged people

☐ Homeless or at risk of becoming homeless

☐ Parents separated from their children by forced adoption or removal

☐ Specific services for people with dementia

Specialised services: (?)

☐ Dementia

☐ Caters for cultural, spiritual or ethical food requirements

☐ Terminal illness

Preferred language chosen:

Preferred client language

Enter the search criteria. Some further criteria display, depending on previous selections, such as how a service is delivered. Then, select the **SEARCH** button.

Service Finder

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

Locate these services:

Multi-Purpose Service - Residential

No associated goals

Using this location or service provider name:*

☐ Use the client's address ☒ Enter a suburb/postcode ☐ Enter a service provider name ☐ Select a location

Enter suburb or postcode and select from the list below *

RUSSELL, ACT, 2600

That will be delivered: In a centre/facility environment

Within 30 km of the centre/facility

Diverse needs: (?)

☐ Aboriginal and/or Torres Strait Islander peoples and communities

☐ People who live in rural or remote areas

☐ Veterans

☐ Care-leavers

☐ Lesbian, gay, bisexual, transgender and intersex people

☐ Culturally and linguistically diverse

☐ Financially or Socially disadvantaged people

☐ Homeless or at risk of becoming homeless

☐ Parents separated from their children by forced adoption or removal

Specialised services: (?)

☐ Dementia

☐ Caters for cultural, spiritual or ethical food requirements

☐ Terminal illness

Preferred language chosen:

Preferred client language

Using the following advanced options:

☐ Previously used by client ☐ Show only funded services

SEARCH CANCEL



- When searching for services provided at a centre/facility, assessors are also able to select a location on a detailed visual map when matching and referring a client for service.

Select a location on the map by placing a pin, this pin may be moved to select a different location, and assessors can navigate around the map to view areas adjacent to the one currently displayed.

When searching by using the map functionality, the search results displayed will contain a list of service providers who provided services at a service delivery address within the search radius entered.

Using this location or service provider name:*

☐ Use the client's address
 ☐ Enter a suburb/postcode
 ☐ Enter a service provider name
 ☒ **Select a location**

That will be delivered: In a centre/facility environment

Within km of the centre/facility

- View the search results. The search results will be sorted to display the most relevant service providers first or randomised in the case of equal relevance.

By default, you will be able to view the search results of service providers plotted on a detailed, interactive map. You can click **Hide Map** to switch to the list view and click **Show Map** when in the list view to revert to the map view.

The search results will display search results in the following configuration depending on the criteria used when searching for services.

Search method	Service delivery location	Map View	List View
Client Address; or Suburb/Postcode	At Client Location	Outlet Address	Outlet Address
Client Address; or Suburb/Postcode; or Select A Location	At Provider Location	Address where services will be delivered	Outlet Address and service delivery address (under the individual service)
Service provider name	N/A	Map will be hidden for all services except Residential Care services	Outlet Address and service delivery address (under the individual service)

As services can be offered at both provider and client location in a service delivery outlet (with the exception of residential care services) the map will be hidden when searching by service provider name, as these results will not display consistently on the map.

The availability of services, service sub-types and waitlist options are displayed for each service provider.

MAP VIEW

Service Finder

3 Service Providers found

Sort results by Relevance

HIDE MAP

Hetti Perkins
2 Percy Court ALICE SPRINGS NT 0870 | 02 1051 1080

Select Preference

☐ Residential Respite Care Available Waitlist

Specialisations

Flynn Lodge
446 Stuart Highway ALICE SPRINGS NT 0870 | 02 8984 9813

Select Preference

☐ Residential Respite Care Available Waitlist

Old Timers
446 Stuart Highway BRATLING NT 0870 | 02 9682 9636

Select Preference

☐ Residential Respite Care Available Waitlist

Please make sure you have client consent before saving these preferences.

SAVE SELECTION AND CONSENT **CANCEL**

LIST VIEW

Service Finder

3 Service Providers found

Sort results by Relevance

SHOW MAP

Hetti Perkins
2 Percy Court ALICE SPRINGS NT 0870 | 02 1051 1080

Select Preference

☐ Residential Respite Care Available Waitlist

Specialisations

Flynn Lodge
446 Stuart Highway ALICE SPRINGS NT 0870 | 02 8984 9813

Select Preference

☐ Residential Respite Care Available Waitlist

Old Timers
446 Stuart Highway BRATLING NT 0870 | 02 9682 9636

Select Preference

☐ Residential Respite Care Available Waitlist

Please make sure you have client consent before saving these preferences.

SAVE SELECTION AND CONSENT **CANCEL**

- Specialisations can be expanded by clicking the arrows next to **service availability** or **Specialisations** to view more detailed information about the services (including availability and wait list availability) and specialised service offerings of each service provider. For Diverse Needs, only verified diverse needs specialisations will be shown.



Service Finder (show search fields)

3 Service Providers found

Hetti Perkins
2 Percy Court ALICE SPRINGS NT 0870
02 1051 1080

Select

Preference

☐
1
Residential Respite Care
Available
Waitlist

Specialisations

Flynn Lodge
446 Stuart Highway ALICE SPRINGS NT 0870
02 8984 9813

Select

Preference

☐
1
Residential Respite Care
Available
Waitlist

Old Timers
446 Stuart Highway BRAITLING NT 0870
02 8682 9636

Select

Preference

- Assessors can access a detailed page that replicates the information on the My Aged Care service finder by selecting the service name hyperlink under the service provider's name. Assessors can view any regulatory decisions made against the provider by selecting the **Regulatory decisions are available here** hyperlink under the provider's contact details. For care types under the Act, this page will also include information around the status of the service, costs of service etc. For example, Residential Permanent services outline information around the facility's accreditation and costs for different room types.

Information details for Welcoming Provider
CLOSE

Welcoming Provider
Previously known as Welcoming House
Locally Known as Not Supplied
09 8765 4321
www.welcomingprovider.com.au
Commonwealth government subsidised
Accredited
Available
Regulatory decisions are available here

Description

Services

Costs

Street address
111 Care Avenue
ALICE SPRINGS
NT 0870

Business address
111 Care Avenue
KILGARRIFF
NT 0873

Phone: 01 2345 6789
Fax:
Email: welcome@welcomingprovider.com.au

Map
Satellite
Map data ©2022 Terms of Use

Welcoming House is a 40 bed Aged Care Home.

- The following message will be displayed if an appropriate service provider is not found:

i

You searched for HAYMARKET, NSW, 2000 for:
Domestic Assistance
But there were no providers found matching all of the above criteria

11. Select the client's preferred service provider(s), ensure that you have the client's consent to send the referrals, and select **SAVE SELECTION AND CONSENT**.

- For [broadcast referrals](#), set preferences for all service providers to **1st**. In agreeing to a broadcast referral, the client needs to be aware that multiple providers could contact them about their service referral.
- For [sequential referrals](#), set preferences for service providers in order of the client's preference.

! Waitlisting

If none of the client's preferred service providers are available, they may wish to be placed on a waitlist. The search results will indicate whether a service provider has a waitlist available.

When referrals are sent sequentially and a provider accepts a client on to a waitlist, this will automatically trigger a referral to be issued to the next preference.

Clients may choose to be on multiple waitlists at the same time.

Clients will remain on a provider's waitlist until the provider indicates services are available and accepts the client referral.

12. The selected service provider(s) will now display as saved against the recommended service.



Services not yet in place

Help at Home

Equipment and products

Low

No associated goals

Recommended By: Africa Green

User Type: Assessor

Selected providers

- Mercy Health Home Care Services Young

SEND REFERRALS CHANGE THIS SELECTION ISSUE REFERRAL CODE REMOVE THIS SERVICE RECOMMENDATION EDIT PREFERENCES

13. To edit or remove existing provider preferences, select **EDIT PREFERENCES**.

Services not yet in place

Help at Home

Equipment and products

Low

No associated goals

Recommended By: Africa Green

User Type: Assessor

Selected providers

- Mercy Health Home Care Services Young

SEND REFERRALS CHANGE THIS SELECTION ISSUE REFERRAL CODE REMOVE THIS SERVICE RECOMMENDATION EDIT PREFERENCES

14. To issue electronic referrals, select **SEND REFERRALS**.

Services not yet in place

Help at Home

Equipment and products

Low

No associated goals

Recommended By: Africa Green

User Type: Assessor

Selected providers

- Mercy Health Home Care Services Young

SEND REFERRALS CHANGE THIS SELECTION ISSUE REFERRAL CODE REMOVE THIS SERVICE RECOMMENDATION EDIT PREFERENCES

15. Select **CHANGE THIS SELECTION** to choose additional provider preferences.

Services not yet in place

Help at Home

Equipment and products

Low

No associated goals

Recommended By: Africa Green

User Type: Assessor

Selected providers

- Mercy Health Home Care Services Young

SEND REFERRALS CHANGE THIS SELECTION ISSUE REFERRAL CODE REMOVE THIS SERVICE RECOMMENDATION EDIT PREFERENCES

16. A screen will be displayed for you to review preferences and capture any other information relevant to the service provider prior to issuing the referrals. You can also **REMOVE** a service provider in this screen by ticking the relevant checkbox. Once all information has been reviewed, select **SEND REFERRALS**.

17. You will receive a confirmation message that referrals have been sent. You will also be able to see a visual indicator of the status of the referrals.

18. Once the referral has been accepted, the service will be displayed under **Services in place**.
The referral statuses that will display are:

Category	Status
Service not yet in place	Not actioned, Rejected referral, Recalled referral, Referral/s pending, Accepted to waitlist
Services pending	Referral code generated, Referral accepted but services have not commenced
Service in place	Services are being provided
Home Care	Package Unassigned, Package Assigned, Package Committed, Package Withdrawn, Package Declined.

Recalling a referral

When a referral for service is issued, it is expected that the service provider will action the referral by accepting or rejecting it. You can recall the referral before the service provider actions it.

1. On the **Manage services & referrals** tab, select the **RECALL** button to recall the referral.

Support plan and services

HOME SUPPORT ASSESSMENT

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

Services not yet in place

Help at Home

Equipment and products

● Low

● Referral/s Pending

No associated goals

Recommended By: Africa Green

User Type: Assessor

Selected providers

- Mercy Health Home Care Services Young

Awaiting response

RECALL EDIT PREFERENCES

A pop up box will be displayed. Select which provider to recall the referral from and select **RECALL REFERRALS**.

Recall referral

You are about to cancel and recall a referral for Equipment and products for Flexi Care UAT. Recalled referrals cannot be re-sent.

Select the referrals to be recalled from the list below:

☒ Mercy Health Home Care Services Young

RECALL REFERRALS CANCEL

2. You will receive a banner confirming that the referral/s are successfully recalled.

Support plan and services

HOME SUPPORT ASSESSMENT

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

Services not yet in place

Help at Home

Equipment and products

● Low

● Referral/s Pending

No associated goals

Recommended By: Africa Green

User Type: Assessor

Selected providers

- Mercy Health Home Care Services Young

Awaiting response

FIND PROVIDERS ISSUE REFERRAL

Referrals are successfully recalled for Equipment and products for Flexi Care

3. The referral status will be updated to **Recalled Referrals**. In the case of sequential preference referrals, the status of the referral will not change to **Recalled Referrals** until the

final preference has been recalled. If you recall a referral, you cannot send it to the same provider again. You can send referrals to different providers for that service.

Services not yet in place

Help at Home

Equipment and products

Low

No associated goals

Recommended By: Africa Green

User Type: Assessor

Recalled Referral/s

FIND PROVIDERS ISSUE REFERRAL CODE REMOVE THIS SERVICE RECOMMENDATION

Issuing a referral code

! Assessors cannot issue referral codes to the older person or service providers for all service referrals (including for CHSP) until after the Assessment Delegate has completed and signed a Notice of Decision.

For more information, please refer to *Chapter 9: Finalising the Assessment and Service Referral* of [My Aged Care Assessment Manual](#).

1. Select the **Manage services & referrals** tab from the client's Support Plan and select **ISSUE REFERRAL CODE** for the service.

Services not yet in place

Help at Home

Equipment and products

Low

No associated goals

Recommended By: Africa Green

User Type: Assessor

Recalled Referral/s

FIND PROVIDERS ISSUE REFERRAL CODE REMOVE THIS SERVICE RECOMMENDATION

2. A confirmation message will be displayed. Select **ISSUE REFERRAL CODE**.

Issue referral code

You are about to issue a referral code for Equipment and products for Flexi Care Urban.

ISSUE REFERRAL CODE CANCEL

3. You will receive a confirmation message that the referral code has been generated, and the details of the referral will appear under the **Services pending** section. The referral code will be displayed on the referral list, and the referral code letter should be printed and provided to the client.

Services not yet in place

Help at Home

Equipment and products

● Low

● Recalled Referral/s

No associated goals

Recommended By: Africa Green

User Type: Assessor

Manual referral code 2-158852738704

FIND PROVIDERS

✓ Referral code successfully generated.

4. Select **GENERATE REFERRAL CODE LETTER** to print the referral code letter.

No associated goals

Recommended By: Africa Green

User Type: Assessor

Manual referral code 2-158852738704

FIND PROVIDERS

National ATSI Aged Care Program

● Low

No associated goals

Recommended By: Africa Green

User Type: Assessor

Selected providers

- Horton House and Warmington Lodge

Awaiting response

RECALL EDIT PREFERENCES

Aged Care Homes

Multi-Purpose Service - Residential

● Low

No associated goals

Recommended By: Africa Green

User Type: Assessor

Manual referral code 2-158852738628

FIND PROVIDERS

GENERATE REFERRAL CODE LETTER

5. A processing window will be displayed indicating the letter being generated.

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

6. The generated report will be available under the **REPORTS AND DOCUMENTS** page ready to be downloaded.

Reports and documents

Reports Forms Links

My Reports

Name	Requested Date	Status
Flexi Care Urban Referral Code and List of Providers 21 May 2025	21 May 2025	Ready - View



7. Below is a copy of the generated referral code letter.

Mr Flexi Care Urban
84 OODGEROO Avenue,
FRANKLIN, ACT, 2913

Mr Flexi Care UAT,

As a result of your recent assessment with Africa Green (GRAZIER AGED CARE - ACA - ACT) and conversations with My Aged Care, we are providing referral codes to enable you to access the following service(s).

The referral code allows you to visit and select your preferred service provider.

Please quote the referral code to service providers to assist with discussions and determine the best service for you.

Your recommended services

Service	Referral code
1. Multi-Purpose Service - Residential	2-158852738628
2. Equipment and products	2-158852738704

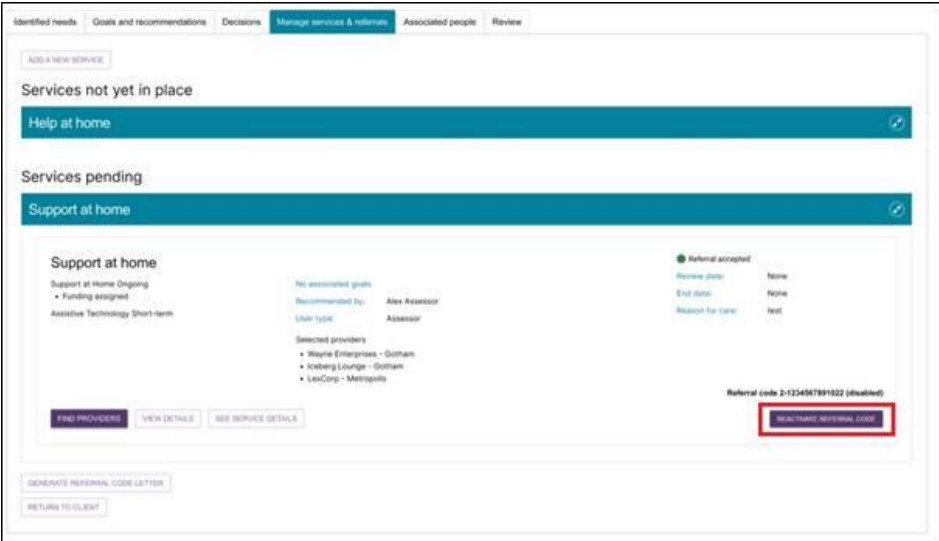
For information about service providers who deliver your recommended services, please use our Service Finder by visiting www.myagedcare.gov.au.

If you have any further queries, please call the My Aged Care contact centre on 1800 200 422.

! A client can change providers without changing their referral code. Against a Support at Home in **Manage Services & Referrals** you will see a status displayed next to the referral code. This could be one of the following:

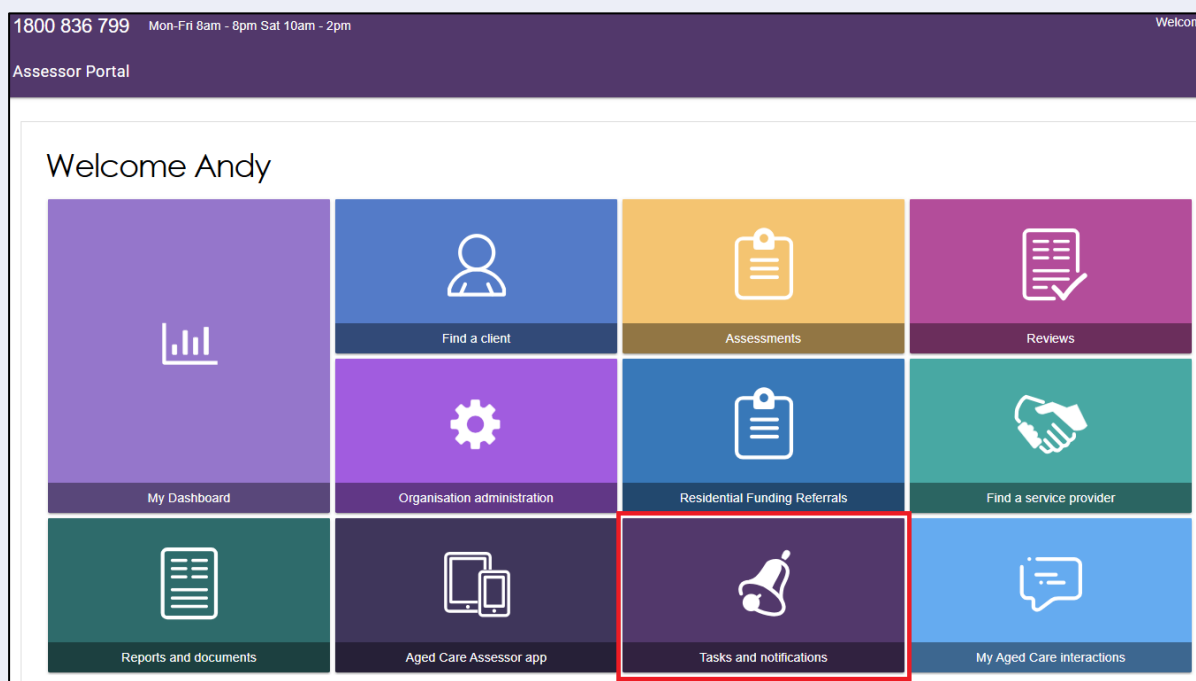
- **Active** – a client is assigned a Support at Home classification, and the referral code can be used.
- **Used** – an old referral code for a previous approval that can no longer be used by the client or the service provider for referrals.
- **Inactive** – this status will display if a client has notified that they are not seeking services and/or has had an assigned Support at Home classification withdrawn and not replaced or upgraded.
- **Disabled** – this status will display once a service referral is accepted. The referral code is disabled and unable to be used by other providers until it is reactivated.

If a client wishes to **reactivate** their referral code, for example they might be changing providers, a client or supporter can do this via the My Aged Care online account or by contacting the My Aged Care contact centre. Clinical assessors can also perform this function in the **Manage Services & Referrals** tab of the support plan. The following screenshots demonstrate the reactivation of the referral code.

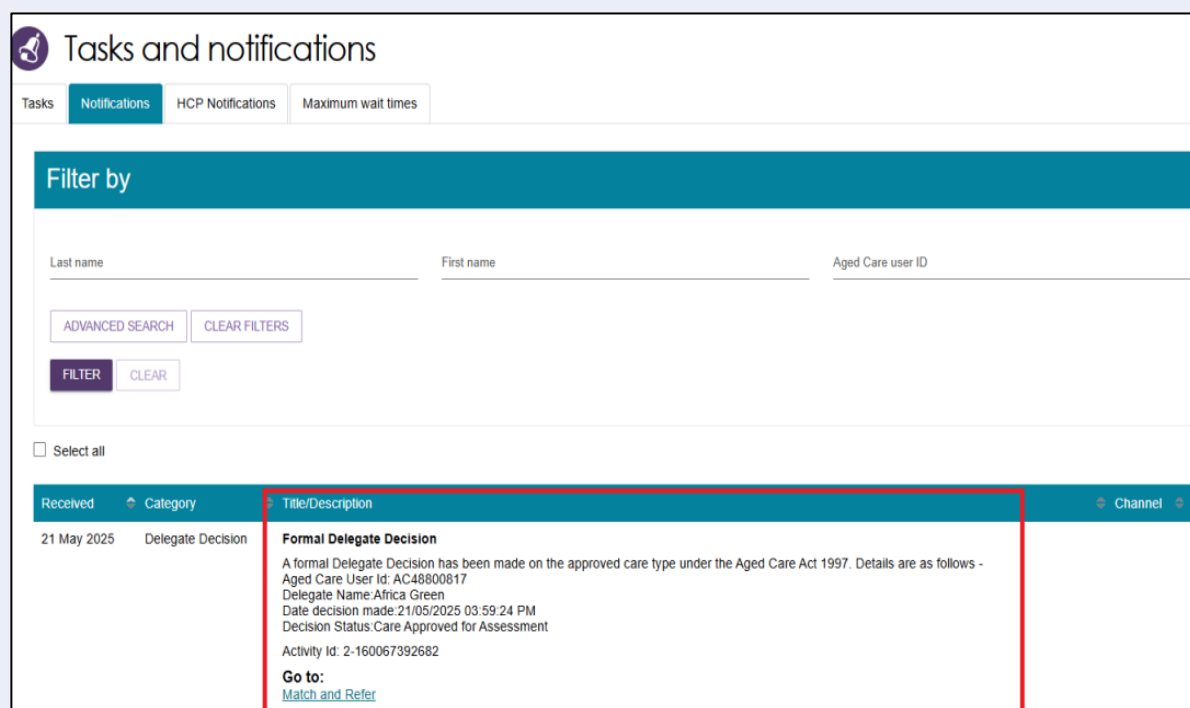


Viewing Delegate decisions

1. Go to the **Tasks and notifications** tile in the assessor portal.



2. Go to the **Notifications** tab, and filter for your client if necessary. A Formal Delegate Decision notification will look like this:



3. Alternatively, go to the Assessments tile of the assessor portal home page. You will be able to see that the Delegate has made a decision in the **Current assessments** tab. The client's assessment will appear under **Delegate decision complete** section in card view, or with a status of **Delegate Decision Complete** in list view.

Current assessments

Current assessments | Recent assessments

CARD | LIST

Filter by

Delegate decision complete

Nova BOND

FRANKLIN, ACT, 2913
Aged care user ID: AC25972829
Date accepted: 12 November 2019

Comprehensive

✓ Delegate Decision Complete ▼ Low

November BOND

FRANKLIN, ACT, 2913
Aged care user ID: AC42520312
Date accepted: 11 November 2019

Comprehensive

✓ Delegate Decision Complete ▼ Low

Referring for Support at Home services

1. Select the **Assessments** tile from the assessor portal home screen.

1800 836 799 Mon-Fri 8am - 8pm Sat 10am - 2pm Welcom

Assessor Portal

Welcome Andy

My Dashboard

Find a client

Assessments

Reviews

Organisation administration

Residential Funding Referrals

Find a service provider

Reports and documents

Aged Care Assessor app

Tasks and notifications

My Aged Care Interactions

2. Select a client within your **Current assessments** tab and then go to the client's support plan.

Thomas KK YINDI

Accepted on 1 May 2025

Preferences

No preference was recorded

Completed Support Plan due by 11 May 2025

Assessment details

FNAO-preference

No

Assessment type

Comprehensive

Assessment reason

Self-Referral

Assessment setting

Non-Hospital

Assessor

Africa Green

Triage conducted by

Africa Green

Support plan

In Progress

Comprehensive Assessment

In Progress

Client story

No client story was recorded

Comments

VIEW FULL CLIENT RECORD

VIEW CLIENT REPORT

Alternatively, you can also go directly to the client's support plan from the **Notifications** tab by selecting on the **Match and Refer** link.

Tasks

Notifications

HCP Notifications

Maximum wait times

Filter by

Last name

First name

Aged Care user ID

ADVANCED SEARCH

CLEAR FILTERS

FILTER

CLEAR

☐ Select all

Received	Category	Title/Description	Channel	Aged Care User ID	Client
22 May 2025	Delegate Decision	Formal Delegate Decision A formal Delegate Decision has been made on the approved care type under the Aged Care Act 2024. Details are as follows - Aged Care User Id: AC50689892 Delegate Name: Africa Green Date decision made: 22/05/2025 12:00:00 AM Decision Status: No Care Approved for Assessment Activity Id: 2-16007770259 Go to: Match and Refer		AC50689892	TIN

- Select the **Manage services & referrals** tab. The services added in the **Goals and recommendations** tab of the support plan will be displayed under **Services not yet in place**. Select **FIND PROVIDERS** to search and create electronic referrals for services.

Services not yet in place

Help at Home

Allied health and therapy

Low

No associated goals

Recommended By: Africa Green

User Type: Assessor

FIND PROVIDERS

ISSUE REFERRAL CODE

REMOVE THIS SERVICE RECOMMENDATION

4. For Support at Home recommendations, you will be able to send electronic referrals for service when the client has been assigned funding from the Support at Home priority system and the status is **Package Assigned**.

Home Care Package providers

Home Care Package

Home Care Package Level approved - Home Care Package Level 2
Home Care Package Level 2 approval starts - 21 June 2017
Home Care Package Level assigned - Home Care Package Level 1
Home Care Package assigned date - 26 June 2017

FIND PROVIDERS

No associated goals
Recommended By: Bella Bluett
User Type: Assessor Portal

Package Assigned

Recommended Start date: None
Recommended Review date: None
Recommended End date: None

Referral code 1-20646477872 (active)

Referring Support at Home services with the Support at Home Priority System

For Home Support services, you will be able to match and refer for service when the client has been assigned a classification from the Support at Home Priority System. On allocation of funding, a referral code is generated, and a letter is sent to the client, with a copy to their supporter/s, instructing them that they can use the referral code to seek services prior to the take-up deadline.

If the client and/or their supporter has elected to receive email notifications, they will also receive an email notification on assignment of their classification.

For more information about setting up and configuring email notifications for clients and/or their supporters, refer to [My Aged Care - Assessor Portal User Guide 2 - Registering support people and adding relationships](#).

If you have elected to receive notification of Support at Home correspondence for the client, you will receive a notification of this and you can proceed to matching and referral if you wish. All electronic referrals should be issued in the client's support plan under Manage services & referrals.

1. Select the **FIND PROVIDERS** button to search for Support at Home providers. For Home Support services, you can search for service providers by specific service attributes including Diverse needs, Specialised services, Languages, and Cultural and Religion. This can be done by selecting **Advanced search** when selecting a service provider.

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

Assessor Portal

My Dashboard Find a client Assessment referrals Review requests Assessments Reviews Organisation administration Residential Funding Referrals **Find a service provider** Reports and documents Aged Care Assessor app Tasks and notifications My Aged Care Interactions Logout

Home | Find a Service Provider

Find a service provider

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

Locate these services:

Select a category *

Support at Home

Select service group(s):

☐ Home modifications

☐ Assistive technology

☒ Home support

Select service type(s)

Home support

Select service type

Social support and community engagement

ACCOMMODATIVE SERVICES

Services added

- Social support and community engagement: Group social support, Individual social support, Accompanied activities, Cultural support, Digital education and support, Assistance to maintain personal affairs, Expenses to maintain personal affairs

Using this location or service provider name:

☐ Enter a suburb/postcode

☐ Enter a service provider name

Advanced search

Diverse needs: 0

☐ Aboriginal and/or Torres Strait Islander peoples and communities

☐ People who live in rural or remote areas

☐ Veterans

☐ Care-leavers

☐ Lesbian, gay, bisexual, transgender and intersex people

☐ Culturally and linguistically diverse

☐ Financially or Socially disadvantaged people

☐ Homeless or at risk of becoming homeless

☐ Parents separated from their children by forced adoption or removal

Specialised services: 0

☐ Dementia

☐ Confidence

☐ Hearing

☐ Respite care

☐ Wellness and rehabilitation

☐ Mental Health

☐ Vision

☐ Terminal illness

☐ Mobility

☐ Assistive Technology

Any providers that offer verified Diverse Needs specialisations, as well as any cultural specialisations and specialised services, will be shown under the Specialisations section of the Service Finder listing.

Home | Find a Service Provider

Cultural: 0

Preferred culture chosen:

Chinese x

Culture:

Religion: 0

Preferred religion chosen:

Religion:

Keyword search:

Keywords:

RESET

SEARCH

1 provider matched criteria

Bendigo Health Services - Community Care Mildura - Support at Home

MILDURA
02 2006 6578

Services supported:
All services searched supported



Managing rejected service referrals

To connect clients to appropriate service providers and ensure consistency for clients, any referrals sent by you will be returned to you for actioning if they are rejected and there are no referral preferences for the client remaining.

Where a referral for service is rejected, and it is the client's final preference, assessors will:

- Receive a notification that the referral was rejected (an All Referrals Rejected task); and
- Be able to reissue referrals to different providers or accept a provider's offer to waitlist, based on discussion with the client.

Follow these steps to follow up a rejected referral:

1. Navigate to the **Tasks** tab in the **Tasks and notifications** section and select the **All Referrals Rejected** link to navigate directly to the client's support plan or the Aged Care User ID link to navigate to the client record.

Tasks and notifications

Tasks Notifications Maximum HCP wait times

Filter by

Due Date	Category	Title/Description	Aged Care User ID	Client name	Activity Id
12/02/2019 Overdue	Referrals	All Referrals Rejected All referrals for this service have been rejected or revoked. Aged Care User Id: AC25336017 Service Type: Home maintenance Rejection Reason: Other - test other Assigned to: ASSESSOR, Frank Go to: All Referrals Rejected	AC25336017	SUMMER Tala	1-55026169521

Alternatively, if you know the client's name you can view all tasks and notifications for an individual client in the **Tasks and Notifications** tab in the client record.

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

Filter by

Type	Due Date	Received Date	Category	Title/Description	Activity Id	Portal	Outlet
Notification		11/02/2019	Referrals	New Referral You have a new referral from My Aged Care. Referral created at: 11/02/2019 14:29 Aged Care User Id: AC25336017 Outlet Name: Aged Care Outlet 1 Service Type: Allied Health and Therapy Services Priority: Medium	1-55026166169	Service Provider Portal	Aged Care Outlet 1, Aged Care Service
Task	12/02/2019 Overdue	11/02/2019	Referrals	All Referrals Rejected All referrals for this service have been rejected or revoked. Aged Care User Id: AC25336017 Service Type: Home maintenance Rejection Reason: Other - test other Assigned to: ASSESSOR, Frank Go to: All Referrals Rejected	1-55026169521	Assessor Portal	Kingston Aged Care Assessment Service, Corporation of Health and Human Services

2. If navigating directly from the notification, the **Manage services & referrals** tab in the client's support plan will open, where the rejected service type will be displayed with **Rejected Referral/s** on the recommendation.

Services not yet in place

Help at home

☐ Select all Help at home

☐

Allied Health and Therapy Services

Low

No associated goals

Recommended By: Steve Herrera

User Type: Assessor

REFERRAL HISTORY

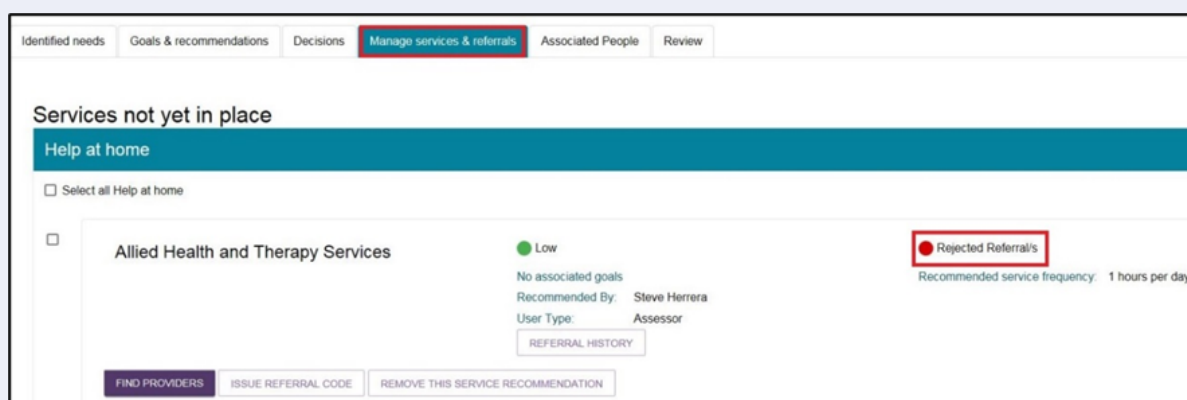
Rejected Referrals

Recommended service frequency: 1 hours per day

FIND PROVIDERS ISSUE REFERRAL CODE REMOVE THIS SERVICE RECOMMENDATION

You will also be able to see the status of any other of the client's referrals.

3. Navigate to the **Manage services & referrals** tab to see the status of the client's referrals.



For Rejected Referrals, select **Referral history** to see the further detail about the reason the referral was rejected.

4. You can now send referrals to new providers or generate a referral code for the client, following the steps described earlier in this guide. Based on the referral rejection reason, you may be required to add further information to a client's referral or need to discuss alternative options with the client prior to issuing another referral.