

Assessor Portal User Guide - Residential Respite Classification Referrals (for assessment organisation Team Leaders)

This user guide outlines how assessment organisation team leaders interact with the My Aged Care assessor portal (assessor portal) to manage Residential Respite Classification referrals (referrals).

This user guide does not contain detailed instructions on functions that assessment organisations perform. Those activities are described in the [Aged Care Assessor Application User Guide](#).

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Privacy requirements

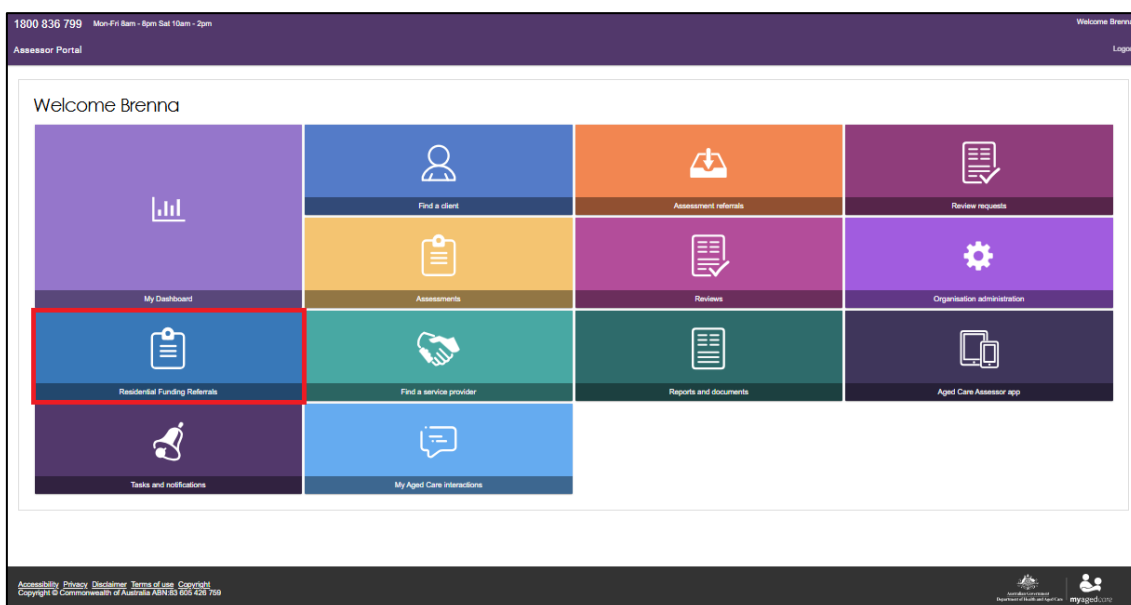
Assessment organisations are required to comply with the legislative requirements under the *Privacy Act 1988* (Privacy Act), including the Australian Privacy Principles when using the assessor portal. The Privacy Act regulates personal information about individuals, including the collection, use, storage and disclosure of personal information, and access to and correction of that information.

For aged care needs assessors (assessors), information collected on My Aged Care for purposes of assessment is also subject to the *Aged Care Act 2024* (Aged Care Act) which they operate under while carrying out their assessment functions.

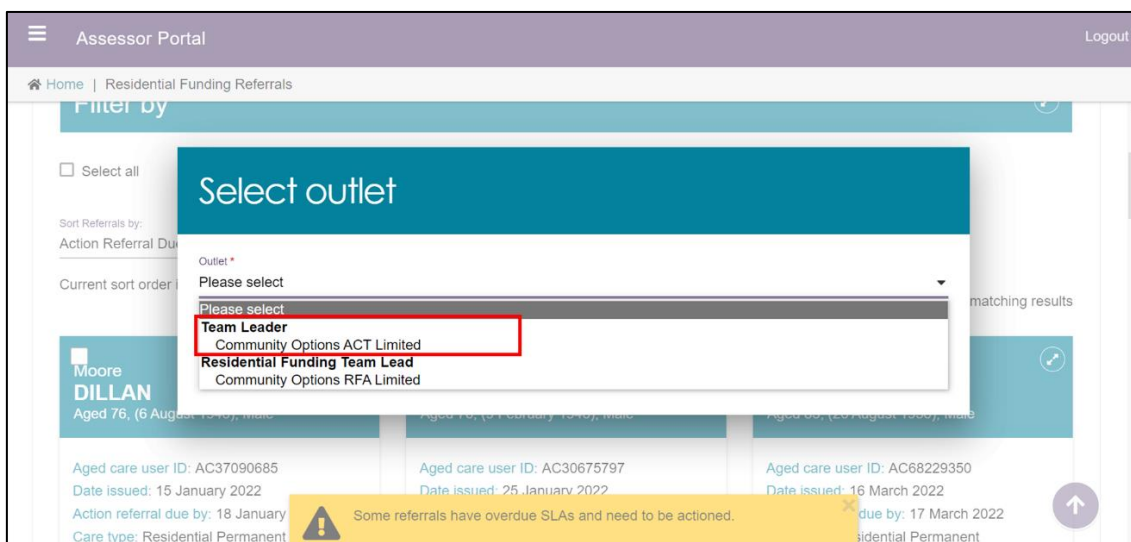
For more information refer to the [My Aged Care Assessment Manual](#).

Assessment organisation team leader view for Residential Respite Classification referrals

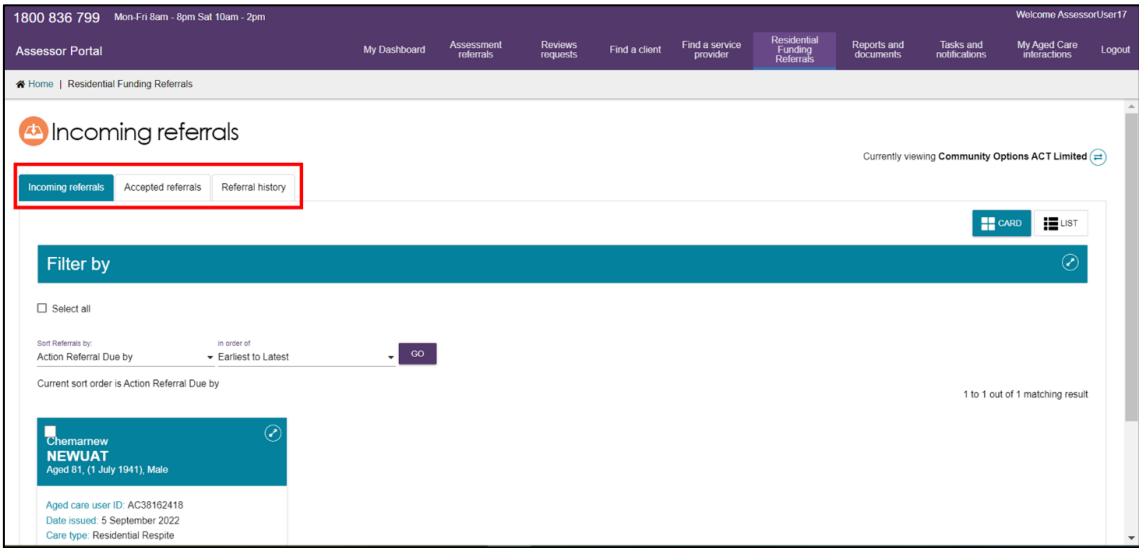
1. Select the **Residential Funding Referrals** tile from the assessor portal home page.



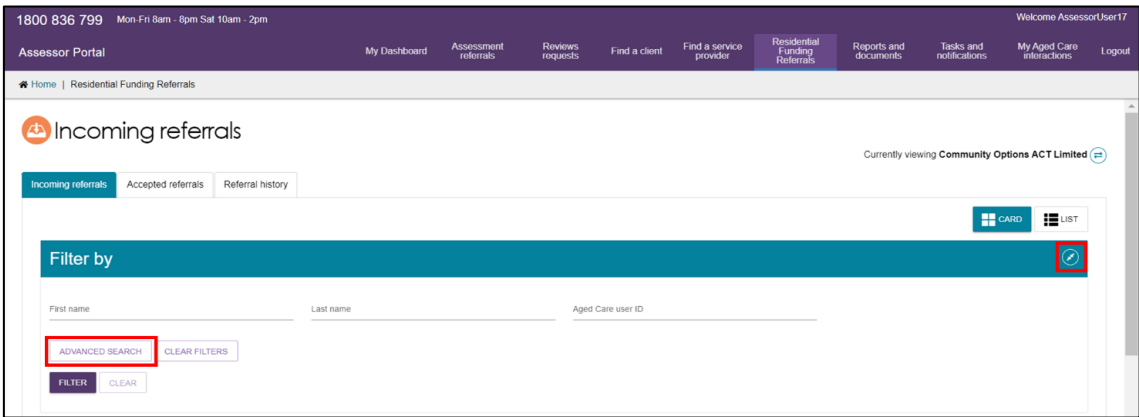
If you are a team lead of both a Residential Funding and assessment organisation outlet, you will be asked to select which outlets referrals you would like to view.



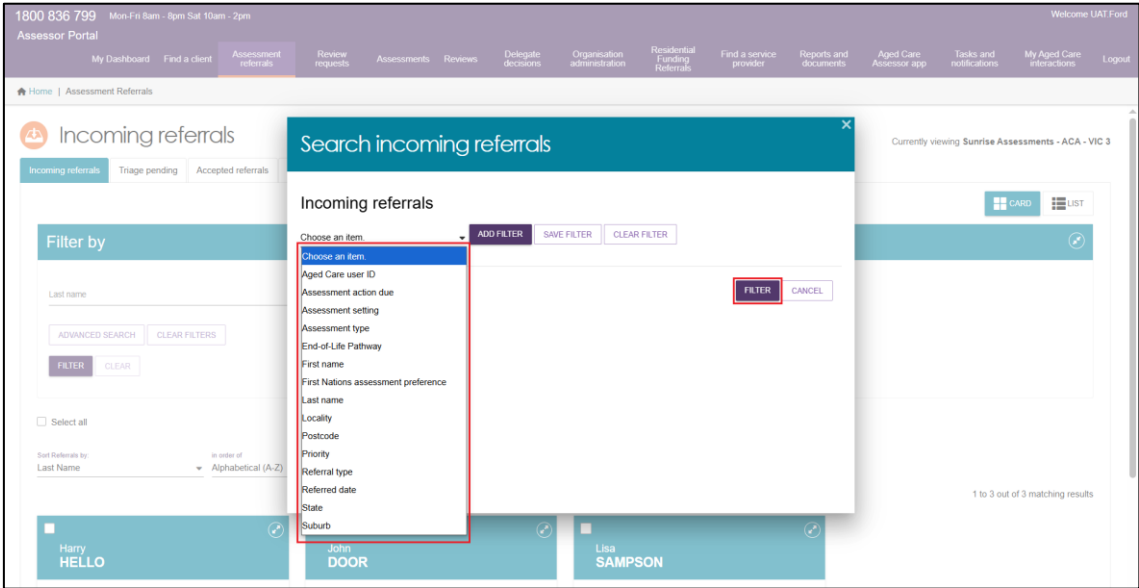
The **Incoming referrals** tab will be displayed. Scroll down the page to view all the incoming referrals for the organisation/outlet.



2. Advanced searches can also be conducted to refine the list of referrals by selecting the **Advanced Search** button.

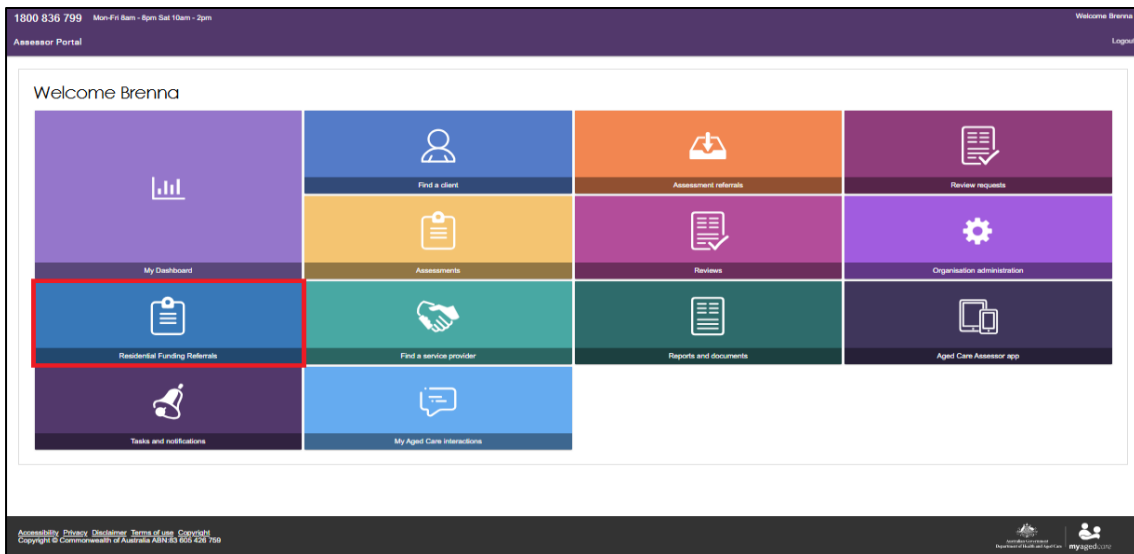


A pop-up will open which will allow you to select from a drop-down list of filters for the list of incoming referrals. To further refine the results, multiple filters can be applied.

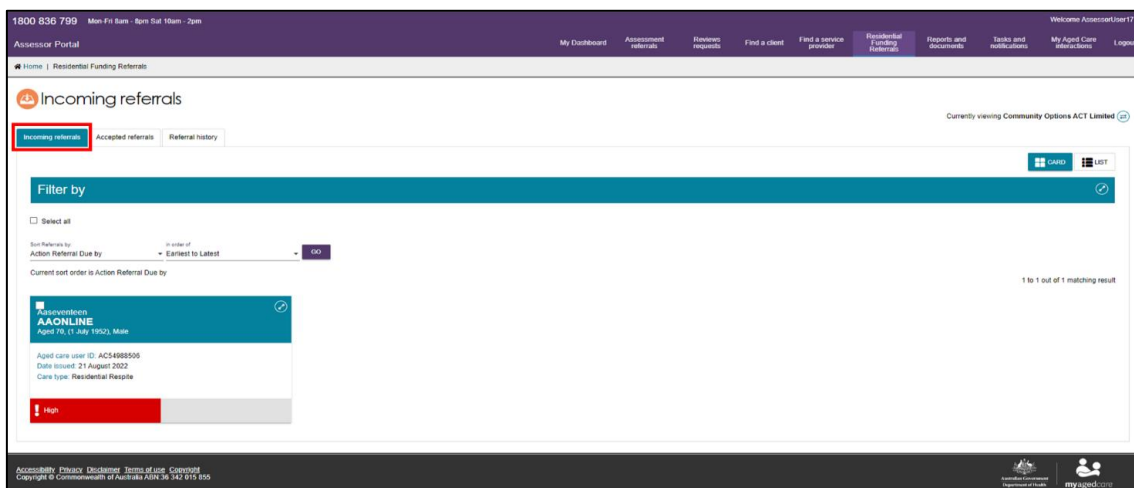


Accepting Referrals

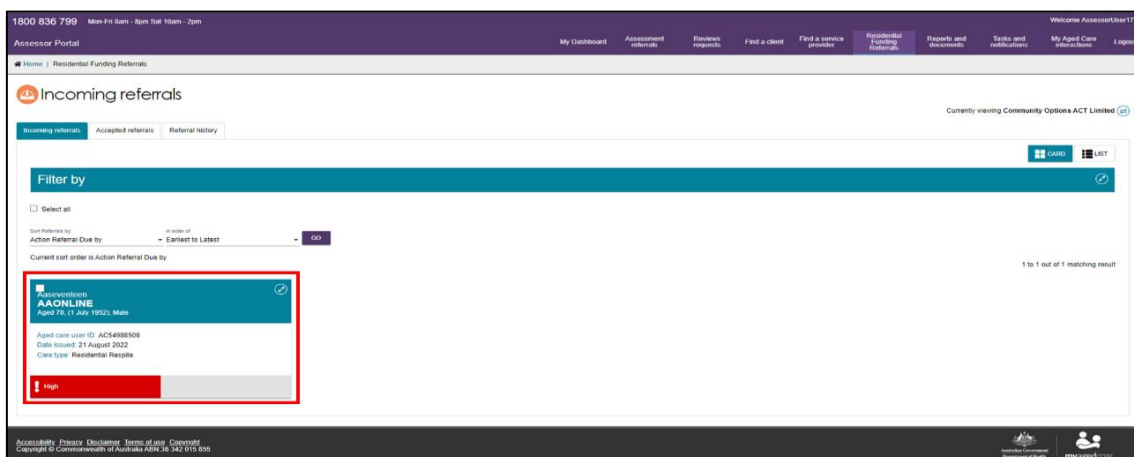
1. Select the **Residential Funding Referrals** tile from the assessor portal home page.



2. Navigate to the **Incoming Referrals** tab. You can conduct a basic search or an advanced search to refine the list of incoming referrals.

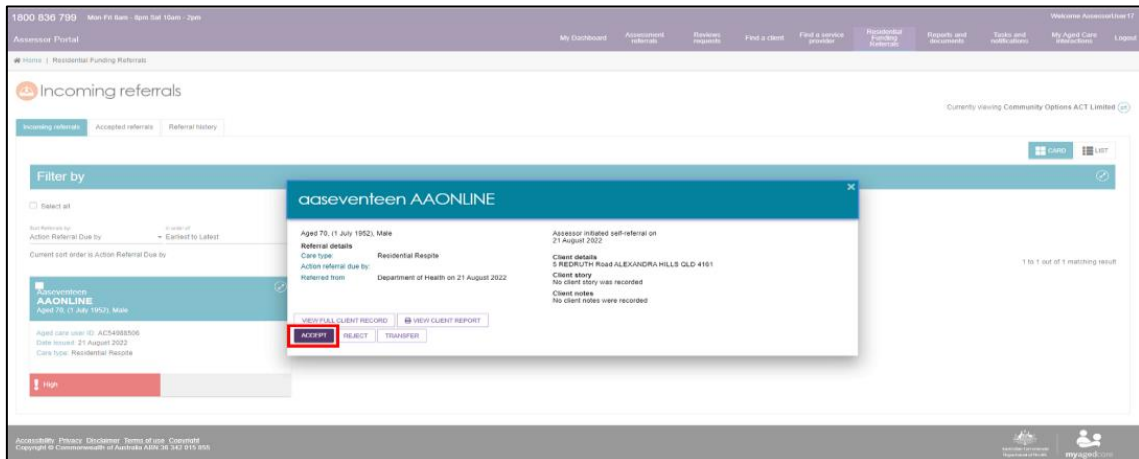


3. To bulk accept referrals, select the tick box on the upper left-hand side of the client tile for the clients whose referrals you wish to accept and select the **Accept** button. You can also accept a referral for only one client. Referrals selected in bulk will need to be [assigned to assessors](#) from the **Accepted referrals** tab.



- When accepting a referral for a single client, a pop-up box will appear confirming the client whose referral you wish to accept.

Once you have confirmed, select the **Accept** button.

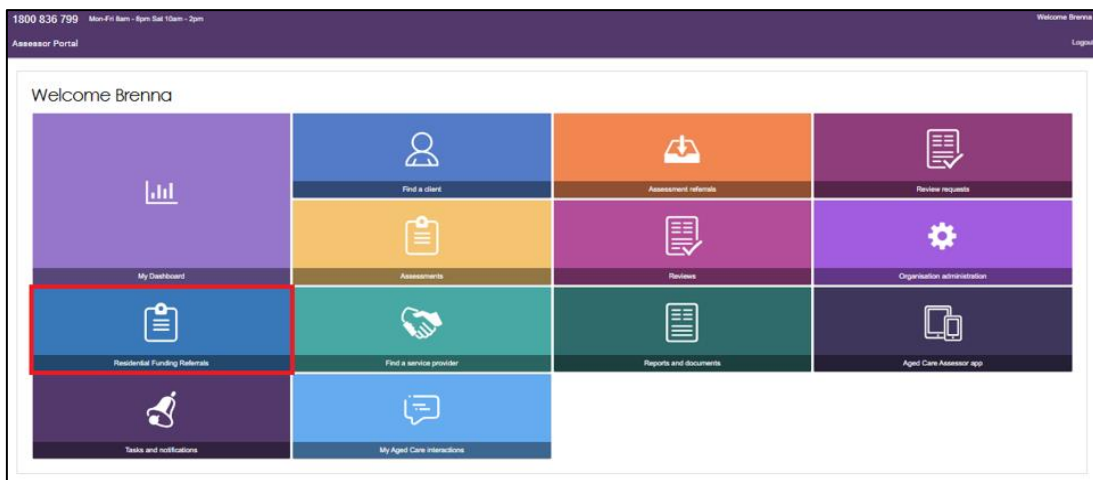


The referral will now be in an Accepted or Assigned state and will be visible on the **Accepted Referrals** tab.

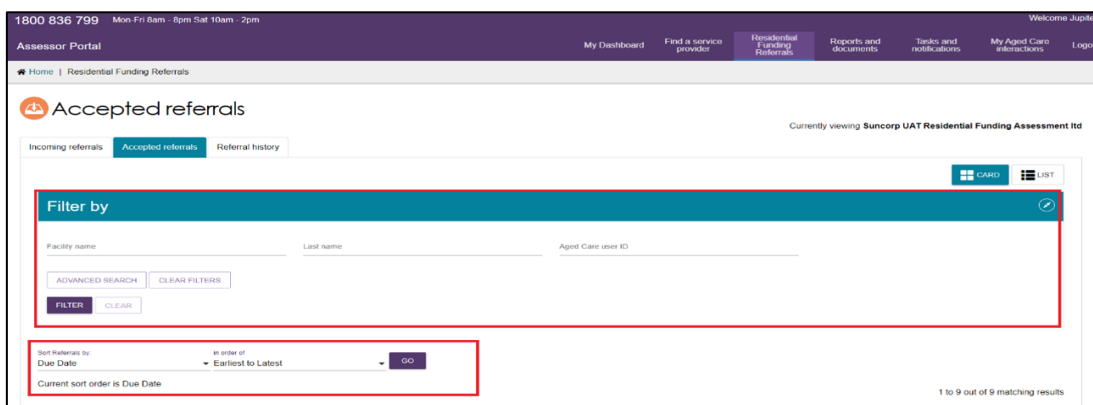
Assigning Referrals

Assessment organisation team leads can assign referrals to assessors.

- From the assessor portal home page, select the **Residential Funding Referrals** tile.



- Navigate to the **Accepted Referrals** tab. You can filter the list of referrals or conduct an advanced search to refine the list of unassigned referrals.



3. Select the referral you wish to assign from the **unassigned** list of referrals.

Assessor Portal

My Dashboard Find a service provider Residential Funding Referrals Reports and documents Tasks and notifications My Aged Care interactions Logout

Home | Residential Funding Referrals

Facility name Last name Aged Care user ID

ADVANCED SEARCH CLEAR FILTERS

FILTER CLEAR

Sort Referrals by: Due Date in order of Earliest to Latest GO

Current sort order is Due Date

1 to 9 out of 9 matching results

Unassigned

Levi BOUY

Rosewood Care Leederville
LEEDERVILLE, WA, 6007
Aged care user ID: AC51307973
Date accepted: 8 February 2022
Completed assessment due by: 1 March 2022
Care type: Residential Permanent

High Due in 20 days

Roy MEHAN

Rosewood Care Leederville
LEEDERVILLE, WA, 6007
Aged care user ID: AC31233489
Date accepted: 8 February 2022
Completed assessment due by: 1 March 2022
Care type: Residential Permanent

High Due in 20 days

Alvin SENSENEY

Rosewood Care Leederville
LEEDERVILLE, WA, 6007
Aged care user ID: AC15845308
Date accepted: 8 February 2022
Completed assessment due by: 1 March 2022
Care type: Residential Permanent

High Due in 20 days

4. A pop-up will appear, select the **assign** button.

UATBergnaum UATGOTTLIEB

Aged 77, (22 July 1945), Male

Referral details

Care type: Residential Respite

Action referral due by: Assessor on 9 September 2022

Referred from: Assessor on 9 September 2022

Assessor initiated self-referral on 9 September 2022

Client details

15 LIMBURG Way GREENWAY ACT 2900

Client story

No client story was recorded

Client notes

No client notes were recorded

Transfer Reason: Clients change in circumstance

Transfer Comments: test this in UAT

VIEW FULL CLIENT RECORD VIEW CLIENT REPORT

ASSIGN REJECT TRANSFER

5. A pop-up will appear, select the assessor that the referral will be assigned to and select the **assign** button.

Accept this referral for UATBergnaum UATGottlieb

15 LIMBURG Way GREENWAY ACT 2900

Select an assessor to assign this referral to *

☒ Ruth Assessor (0 referrals assigned,0 referrals assigned in postcode)

☐ AssessorUser05 AssessorUser05 (2 referrals assigned,0 referrals assigned in postcode)

☐ AssessorUser06 AssessorUser06 (41 referrals assigned,0 referrals assigned in postcode)

☐ AssessorUser09 AssessorUser09 (0 referrals assigned,0 referrals assigned in postcode)

☐ AssessorUser11 AssessorUser11 (0 referrals assigned,0 referrals assigned in postcode)

☐ AssessorUser20 AssessorUser20 (4 referrals assigned,0 referrals assigned in postcode)

☐ AssessorUser21 AssessorUser21 (5 referrals assigned,0 referrals assigned in postcode)

☐ AssessorUser22 AssessorUser22 (0 referrals assigned,0 referrals assigned in postcode)

☐ AssessorUser23 AssessorUser23 (1 referrals assigned,0 referrals assigned in postcode)

☐ AssessorUser25 AssessorUser25 (3 referrals assigned,0 referrals assigned in postcode)

☐ ACAT TL Community Options (0 referrals assigned,0 referrals assigned in postcode)

☐ Arp Gov (0 referrals assigned,0 referrals assigned in postcode)

☐ Marsh Ilo (0 referrals assigned,0 referrals assigned in postcode)

☐ April Mak (0 referrals assigned,0 referrals assigned in postcode)

☐ Orana Phil (0 referrals assigned,0 referrals assigned in postcode)

☐ CompAssessor SBdata (0 referrals assigned,0 referrals assigned in postcode)

☐ Gia UAT (0 referrals assigned,0 referrals assigned in postcode)

☐ Neo UAT (0 referrals assigned,0 referrals assigned in postcode)

☐ Pitaz UAT (0 referrals assigned,0 referrals assigned in postcode)

☐ Prasanna UAT (0 referrals assigned,0 referrals assigned in postcode)

☐ Ria UAT (0 referrals assigned,0 referrals assigned in postcode)

☐ Smith Walter (0 referrals assigned,0 referrals assigned in postcode)

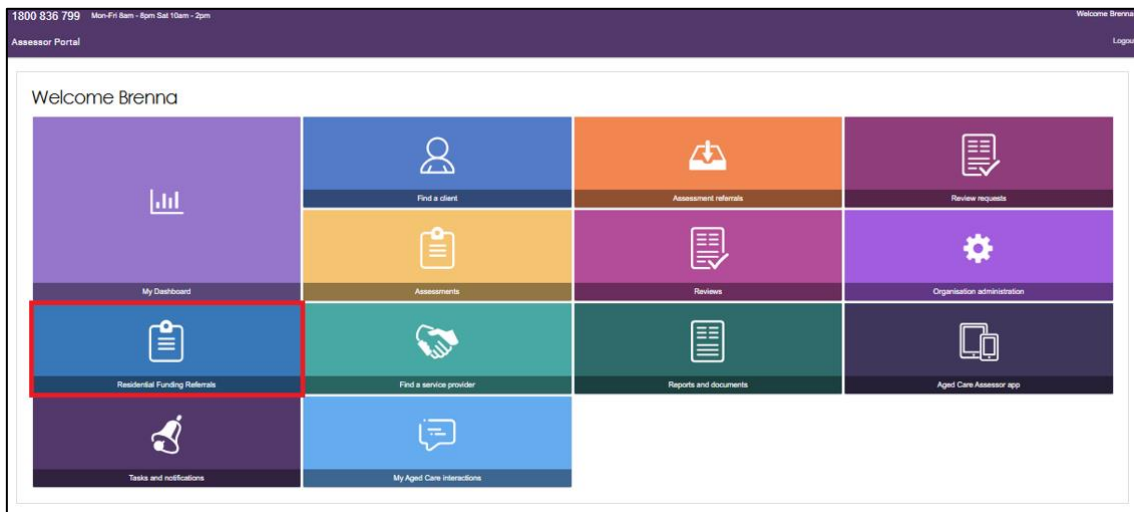
ASSIGN CANCEL

The referral will now be assigned to the assessor selected.

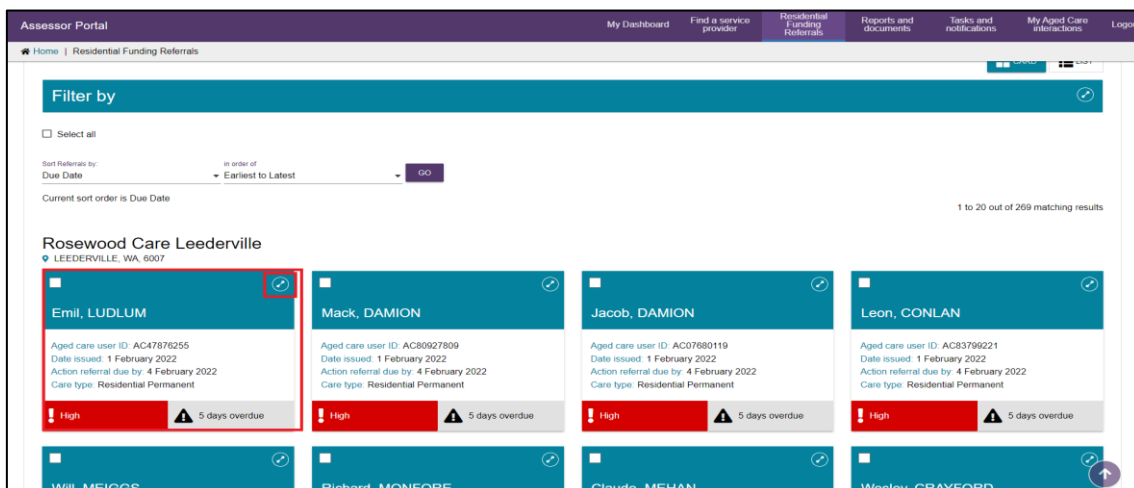
Rejecting Referrals

Assessment organisation team leaders can reject referrals that are both incoming and assigned.

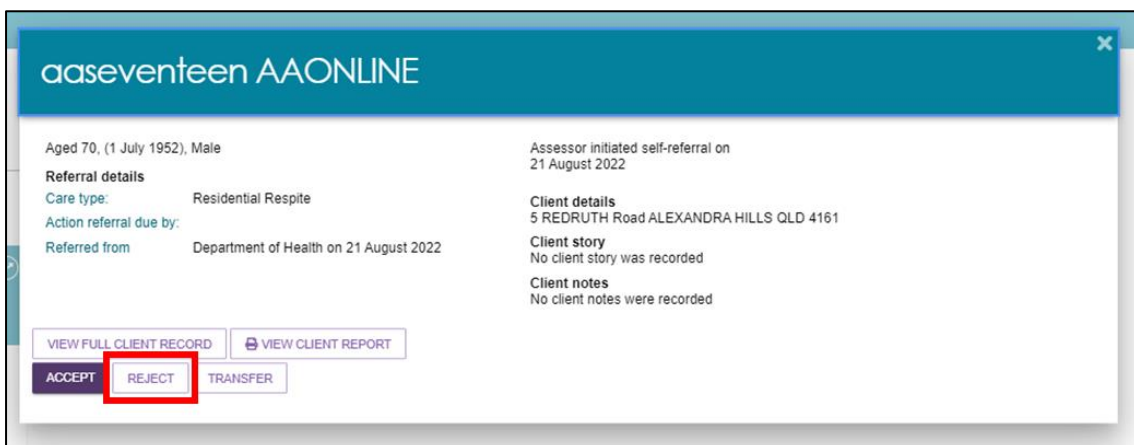
1. From the assessor portal home page, select the **Residential Funding Referrals** tile.



2. Select the referral you wish to reject.



3. A pop-up will appear. Confirm this is the referral you wish to reject and select the **reject** button.



4. A pop-up will appear, select the reason for the referral rejection and provide details in the free text field. Referrals can be rejected for the following reasons:
 - **Client Deceased:** You will be required to provide additional information in regards to the circumstances that surround the client.
 - **Entered a Residential Facility:** This will transfer the referral to a residential aged care funding assessor, please refer to [Transferring Referrals](#) for guidance.
 - **Outlet Insufficient Capacity:** This will transfer the referral back to the department to assign to another outlet.
 - **Other:** Additional details will be required.

Additional details can be provided in the **Details** text box.

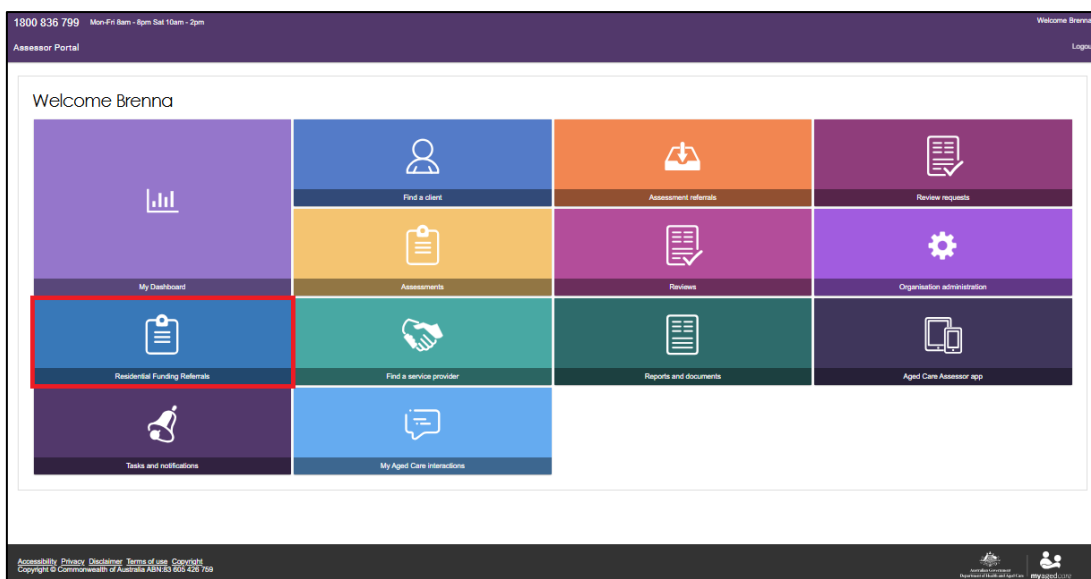
Once complete, select the **reject** button.

The screenshot shows a web form titled "Reject this referral for aaseventeen aonline". At the top, it displays the address "5 REDRUTH Road ALEXANDRA HILLS QLD 4161". Below this, a note states "All fields marked with an asterisk (*) must be completed before submission". The form asks the user to "Select rejection reason *" and provides four radio button options: "Client Deceased", "Entered a residential facility", "Outlet Insufficient Capacity", and "Other". A red rectangular box highlights these options. Below the radio buttons is a "Details:" text area. At the bottom right of the form, there are two buttons: "REJECT" and "CANCEL". A character count "0 / 500" is visible near the bottom right of the details text area.

Transferring Referrals

Assessment organisation team leaders are able to transfer referrals that are both incoming and assigned.

1. From the assessor portal home page, select the **Residential Funding Referrals** tile.



Select the referral you wish to transfer.

The screenshot shows the 'Assessor Portal' interface. At the top, there's a navigation bar with links like 'My Dashboard', 'Find a service provider', 'Residential Funding Referrals', 'Reports and documents', 'Tasks and notifications', 'My Aged Care interactions', and 'Logout'. Below this, a 'Filter by' section allows users to select all referrals or sort them by 'Due Date' (Earliest to Latest). The main area displays a list of referrals for 'Rosewood Care Leederville'. Each referral card includes the name, aged care user ID, date issued, action referral due by, care type, and a status indicator (High, 5 days overdue). The first referral, 'Emil, LUDLUM', is highlighted with a red box and a checkmark icon.

2. A pop-up will appear. Confirm this is the referral you wish to transfer and select the **Transfer** button.

The screenshot shows a pop-up window titled 'aaseventeen AAONLINE'. It displays client details for 'Aged 70, (1 July 1952), Male'. The 'Referral details' section shows 'Care type: Residential Respite', 'Action referral due by: 21 August 2022', and 'Referred from: Department of Health on 21 August 2022'. The 'Client details' section shows '5 REDRUTH Road ALEXANDRA HILLS QLD 4161'. At the bottom, there are three buttons: 'ACCEPT', 'REJECT', and 'TRANSFER'. The 'TRANSFER' button is highlighted with a red box.

Referrals can be transferred to another assessment organisation outlet or to an RFA outlet where the client has entered a Residential Service facility.

Clients who are in Hospital or in the community/home

1. Select assessment setting as either **Home** or **Hospital**.

The screenshot shows the 'Transfer this referral for Chemarnew NEWUAT' form. At the top, there's a header with the phone number '1800 836 799' and the hours 'Mon-Fri 8am - 8pm Sat 10am - 2pm'. The 'Assessor Portal' navigation bar is visible. The main heading is 'Transfer this referral for Chemarnew NEWUAT'. Below this, a note states 'All fields marked with an asterisk (*) are required.' The 'Assessment setting' dropdown is highlighted with a red box, showing options: 'Home' (selected), 'Hospital', and 'Residential Service Facility'. Below this, there's a section for 'Search for an Assessment Organisation: *' with options to 'Use the client's address' or 'Enter an alternative assessment address'. The 'Use the client's address' option is selected, showing the client's address: '23 Bettong Avenue Access THROSBY ACT 2914'. At the bottom, there are buttons for 'SEARCH', 'TRANSFER', and 'CANCEL'.

2. Search for an assessment organisation based on either the client's address or the alternative assessment address and select **Search**.

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

Assessor Portal

Home | Residential Funding Referrals | Transfer Referrals

Transfer this referral for Chemarnew NEWUAT

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

Assessment setting: ?

☒ Home
☐ Hospital
☐ Residential Service Facility

Search for an Assessment Organisation: *

☒ Use the client's address
Client address
23 Bettong Avenue Access THROSBY ACT 2914

☐ Enter an alternative assessment address

SEARCH

TRANSFER CANCEL

A list of assessment organisations will be displayed.

Select the appropriate assessment organisation and select **Transfer**.

Search for an Assessment Organisation: *

☒ Use the client's address
Client address
23 Bettong Avenue Access THROSBY ACT 2914

☐ Enter an alternative assessment address

SEARCH

Select Assessment Organisation*

☐ Test outlet four market, BONNER, Ph 02 6100 7895
☐ Bridie Outlet, GREENWAY, Ph 14 0165 2316
☐ R19 Outlet3, BELCONNEN, Ph 02 7845 2563
☐ SMT PT OL1, Ph 0428 017 389
☐ Community Options Australia Limited - ACT, ARTARMON, Ph 02 8872 4867
☐ Central Intake Outlet FOUR_LUT_RAS, BONNER, Ph 02 6514 7895
☐ Outlet 1, Ph 02 6100 7895
☐ 123 Residential Care, KEYSBOROUGH, Ph 02 8678 6771
☐ R19 Outlet2, BELCONNEN, Ph 02 7856 2522
☐ Nipun Outlet, Ph 0416 781 234
☐ SMT DPT OutletG, Ph 0472 394 832

TRANSFER CANCEL

Clients who are in a Residential Service Facility

1. Select the Assessment setting as Residential Service Facility.

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

Assessor Portal My Dashboard

Home | Residential Funding Referrals | Transfer Referrals

Transfer this referral for aaseventeen AAONLINE

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

Assessment setting: ?

☐ Home

☐ Hospital

☒ Residential Service Facility

Search for a residential service facility: *

☒ Enter a facility name

Facility Name

Ran

☐ Enter a suburb/postcode

Enter suburb or postcode and select from the list below:

SEARCH

TRANSFER CANCEL

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2. Search using either the service facilities name or based on the suburb/postcode.

Assessor Portal My Dashboard

Home | Residential Funding Referrals | Transfer Referrals

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

Assessment setting: ?

☐ Home

☐ Hospital

☒ Residential Service Facility

Search for a residential service facility: *

☒ Enter a facility name

Facility Name

Ran

☐ Enter a suburb/postcode

Enter suburb or postcode and select from the list below:

SEARCH

3. Select search and a list of services will appear, select the correct service and enter a reason for transferring the client.

For Referrals transferred to RFA Outlets this should be **Other**.

Assessor Portal

My Dashboard

[Home](#) | [Residential Funding Referrals](#) | [Transfer Referrals](#)

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

Assessment setting: [?](#)

☐ Home

☐ Hospital

☒ Residential Service Facility

Search for a residential service facility: *

☒ Enter a facility name

Facility Name

Ranelagh Gardens

☐ Enter a suburb/postcode

Enter suburb or postcode and select from the list below:

SEARCH

Select Residential Service Facility:*

☒ Ranelagh Gardens, MOUNT ELIZA, VIC, 3930

Select a reason for transferring this client: *

Select one

Select one:

Insufficient capacity

Outside assessment org region

Clients change in circumstances

Remote assessment

Other

TRANSFER **CANCEL**

Provide comments on why the referral is being transferred and select **Transfer**.

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

Assessor Portal

My Dashboard

[Home](#) | [Residential Funding Referrals](#) | [Transfer Referrals](#)

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

Assessment setting: [?](#)

☐ Home

☐ Hospital

☒ Residential Service Facility

Search for a residential service facility: *

☒ Enter a facility name

Facility Name

Ranelagh Gardens

☐ Enter a suburb/postcode

Enter suburb or postcode and select from the list below:

SEARCH

Select Residential Service Facility:*

☒ Ranelagh Gardens, MOUNT ELIZA, VIC, 3930

Select a reason for transferring this client: *

Other

Comments: *

Transferring as client has entered a residential aged care service.

TRANSFER **CANCEL**

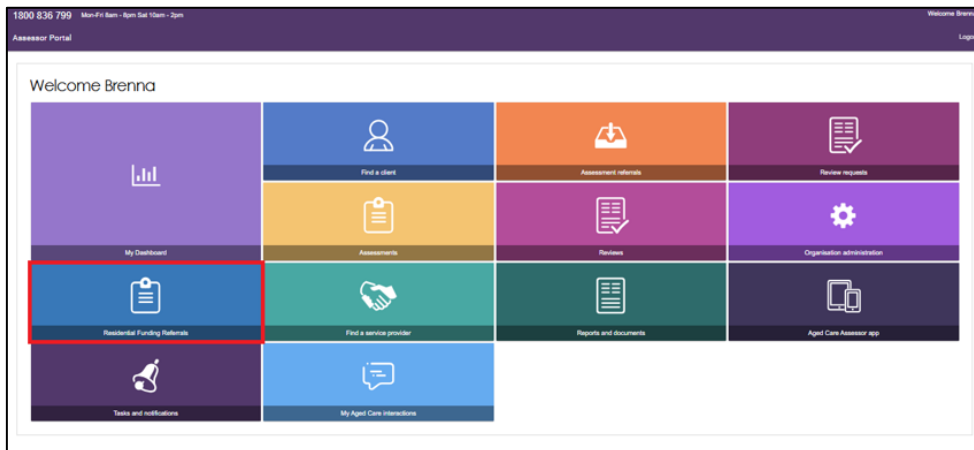
- When a referral has been successfully transferred, you will be navigated back to the **referrals** tab and a green success message will appear.



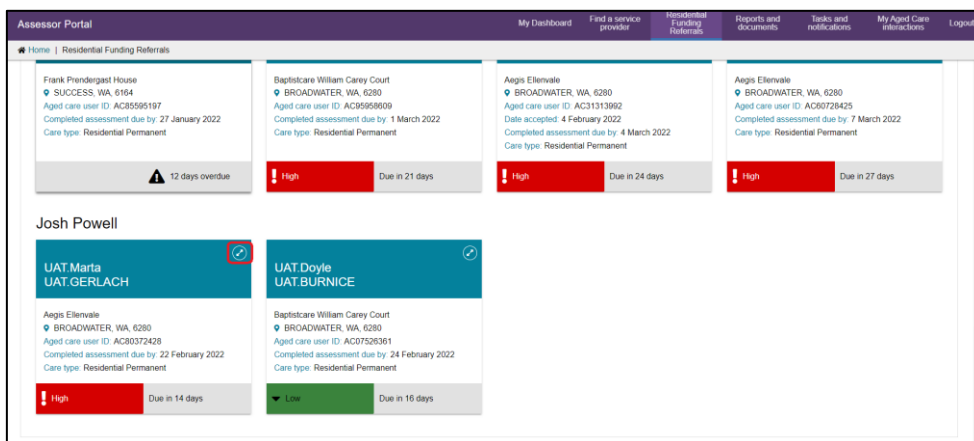
Reassigning Referrals

Assessment organisation team leaders can re-assign referrals that have been assigned to assessors.

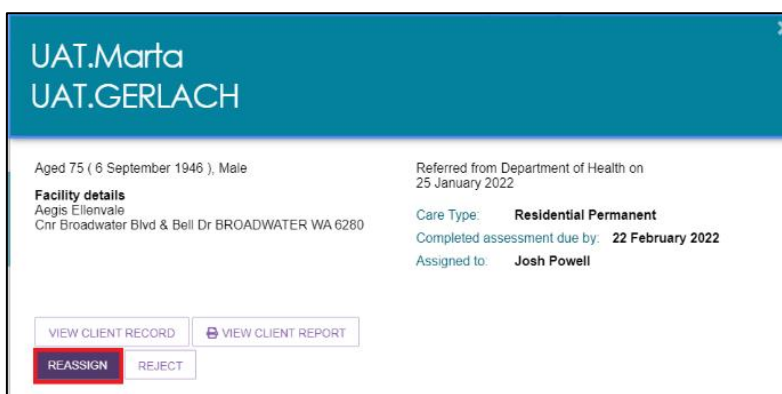
- From the assessor portal home page, select the **Residential Funding Referrals** tile.



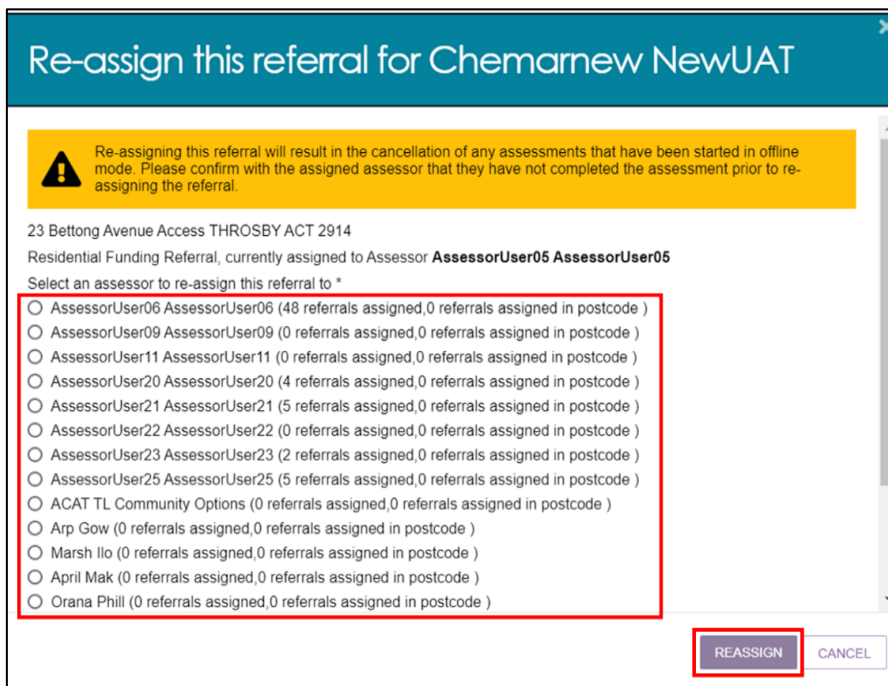
- Navigate to the **Accepted Referrals** tab. You can search for the referral you wish to re-assign or scroll to the assessors referrals that you wish to re-assign.



- A pop-up will appear, select the **Reassign** button.



4. A pop-up will appear. Select the assessor you wish to re-assign the referral to and select the **Reassign** button.



Re-assign this referral for Chemarnew NewUAT

Warning: Re-assigning this referral will result in the cancellation of any assessments that have been started in offline mode. Please confirm with the assigned assessor that they have not completed the assessment prior to re-assigning the referral.

23 Bettong Avenue Access THROSBY ACT 2914
Residential Funding Referral, currently assigned to Assessor **AssessorUser05 AssessorUser05**

Select an assessor to re-assign this referral to *

- ☐ AssessorUser06 AssessorUser06 (48 referrals assigned,0 referrals assigned in postcode)
- ☐ AssessorUser09 AssessorUser09 (0 referrals assigned,0 referrals assigned in postcode)
- ☐ AssessorUser11 AssessorUser11 (0 referrals assigned,0 referrals assigned in postcode)
- ☐ AssessorUser20 AssessorUser20 (4 referrals assigned,0 referrals assigned in postcode)
- ☐ AssessorUser21 AssessorUser21 (5 referrals assigned,0 referrals assigned in postcode)
- ☐ AssessorUser22 AssessorUser22 (0 referrals assigned,0 referrals assigned in postcode)
- ☐ AssessorUser23 AssessorUser23 (2 referrals assigned,0 referrals assigned in postcode)
- ☐ AssessorUser25 AssessorUser25 (5 referrals assigned,0 referrals assigned in postcode)
- ☐ ACAT TL Community Options (0 referrals assigned,0 referrals assigned in postcode)
- ☐ Arp Gow (0 referrals assigned,0 referrals assigned in postcode)
- ☐ Marsh Ilo (0 referrals assigned,0 referrals assigned in postcode)
- ☐ April Mak (0 referrals assigned,0 referrals assigned in postcode)
- ☐ Orana Phill (0 referrals assigned,0 referrals assigned in postcode)

REASSIGN CANCEL

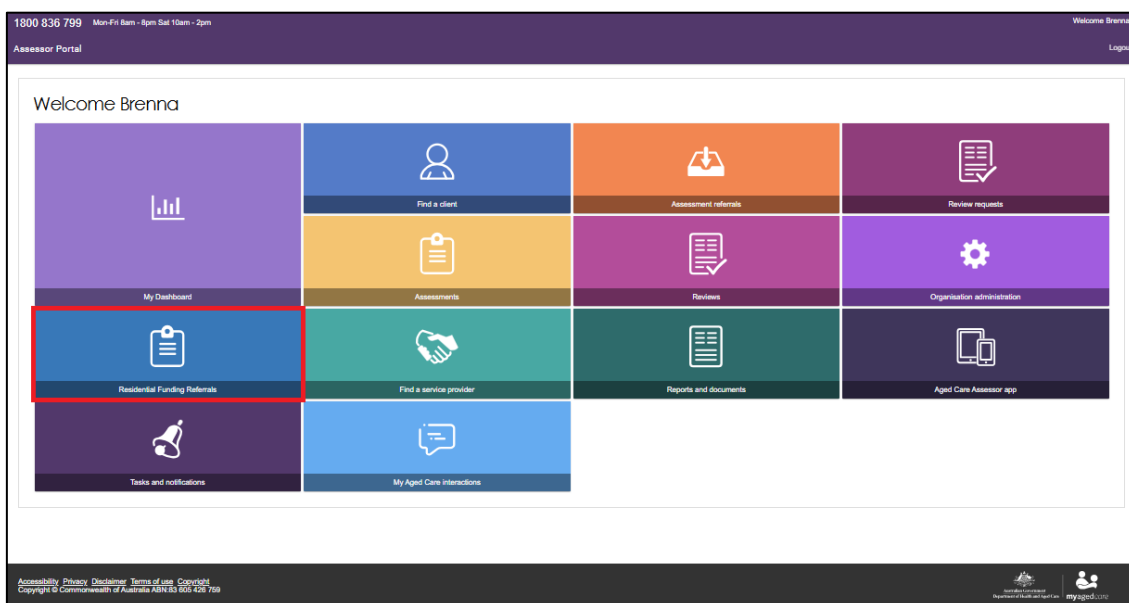
The referral will now be reassigned to the assessor selected to action.

Viewing Historical Residential Funding Referrals

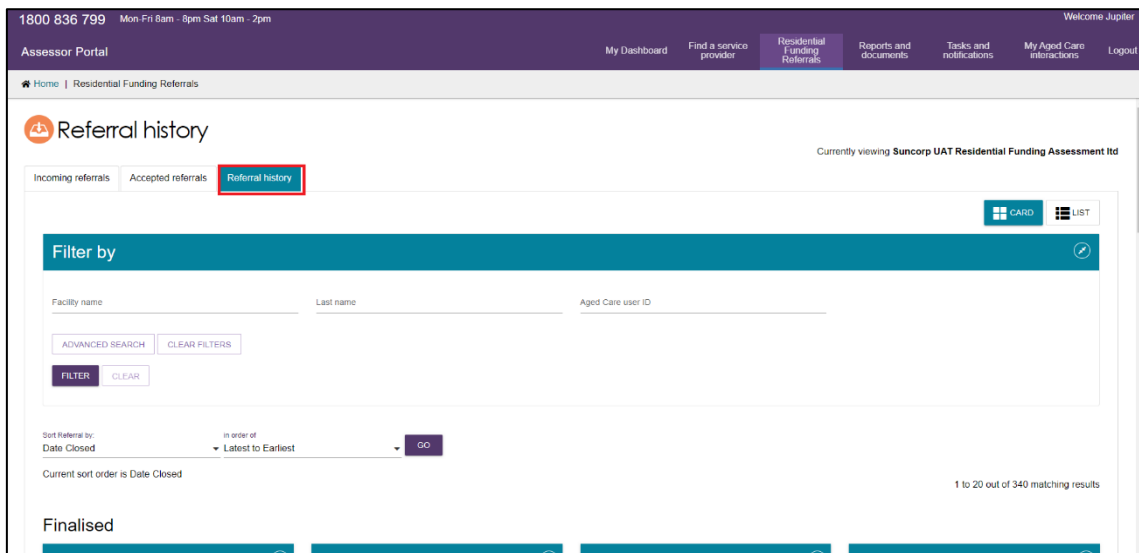
Assessment organisation team leaders can view historical Residential Funding Referrals for their organisation/outlet.

Referral history will display all completed and rejected referrals.

1. From the assessor portal home page, select the **Residential Funding Referrals** tile.



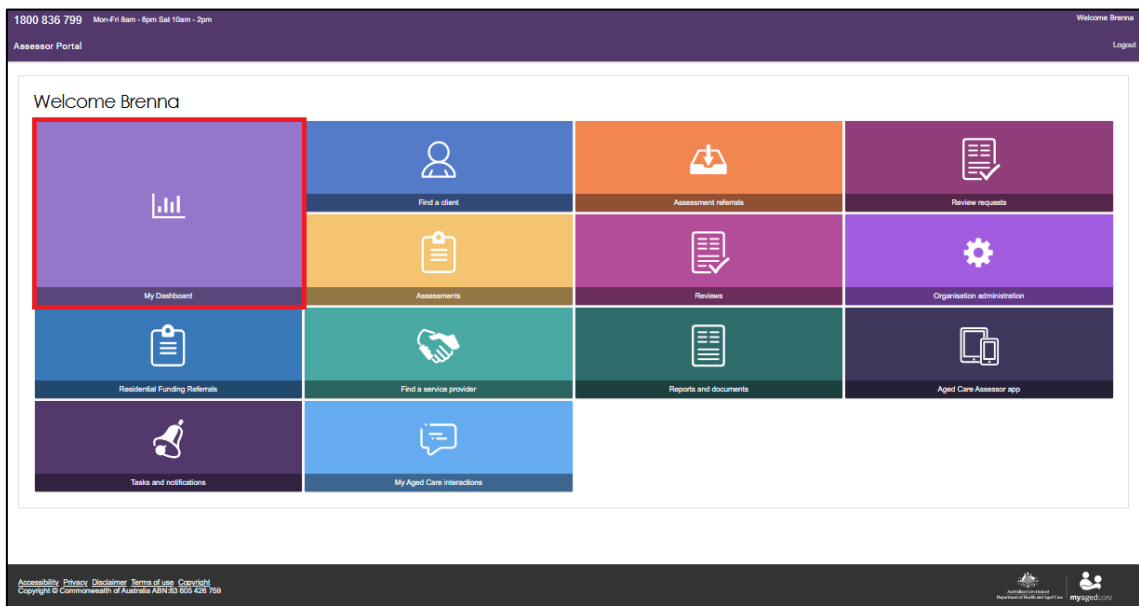
Navigate to the **Referral History** tab. You can search or filter the list of referrals or scroll down to see the finalised referrals for your outlet/organisation.



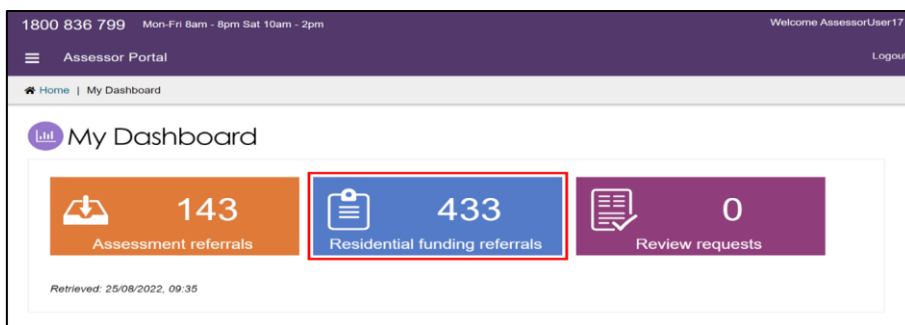
Viewing Progress of Respite Classification Assessments

Assessment organisation team leaders can view the progress of Residential Funding Assessments for their outlet/organisation.

1. From the assessor portal home page, select the **My Dashboard** tile.



2. Select the blue **Residential funding referrals** tile.



- You will now be able to see an overview of the Residential Funding Referrals for your assigned outlets.

To see a detailed breakdown select the referral highlighted count next to the desired outlet.

The screenshot shows the 'Assessor Portal' with a header bar containing the phone number '1800 836 799', the time 'Mon-Fri 8am - 8pm Sat 10am - 2pm', and the user 'Welcome AssessorUser17'. The main navigation bar includes 'Assessor Portal' and a 'Logout' link. The breadcrumb trail is 'Home | My Dashboard | Residential Funding Referrals'. The 'My Dashboard' section features a blue header and a light blue informational box stating: 'The dashboard below displays Residential Funding Referrals in your assigned outlets. The displayed count shows the total in progress referrals assigned to the outlet. To view the outlets completed referrals please select the outlet and refer to the "Completed Residential Funding Referrals" section. A warning will be displayed when an outlet has an actionable item that is approaching or past its due date.' Below this is a 'Residential funding referrals' section with two rows: 'Community Options RFA Limited' with a count of 363 and a red warning icon, and 'Community Options ACT Limited' with a count of 70. The second row is highlighted with a red rectangle.

- The top section will display the breakdown of all in progress assessments, these are the referrals that your outlet has been assigned.

The bottom section will show a count of referrals completed in the current calendar month and the previous calendar month.

Each count is a link that will take you to the list of referrals with the corresponding filter applied.

This screenshot shows a detailed view of the 'Community Options RFA Limited' outlet. It has a blue header and is divided into two main sections. The 'In Progress Residential Funding Referrals' section contains a table with three rows: 'Incoming' (348), 'Unassigned' (1), and 'Assigned' (14). This table is highlighted with a red rectangle. The 'Completed Residential Funding Referrals' section contains a table with two rows: 'Completed this month' (0) and 'Completed previous month' (0). A purple circular button with an upward arrow is located at the bottom right of the page.