

## Service and Support Portal User Guide - Tasks and Notifications

The My Aged Care Service and Support Portal includes a tasks and notifications feature to inform users and prompt action.

The first part of this guide explains the how to view and action tasks and notifications.

An Administrator can also configure preferences for email alerts.

The final section of this guide let Administrators know how to manage and update task and notification preferences for their outlet or organisation.

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## What is the difference between a Task and a Notification?

A **task** is an activity that a provider needs to action (finalise or close), for example a task reminding a team leader to action an overdue referral.

A **notification** is an activity that informs the provider of an event, for example when a new referral is received by an outlet. The provider may need to complete an action as a result of the notification.

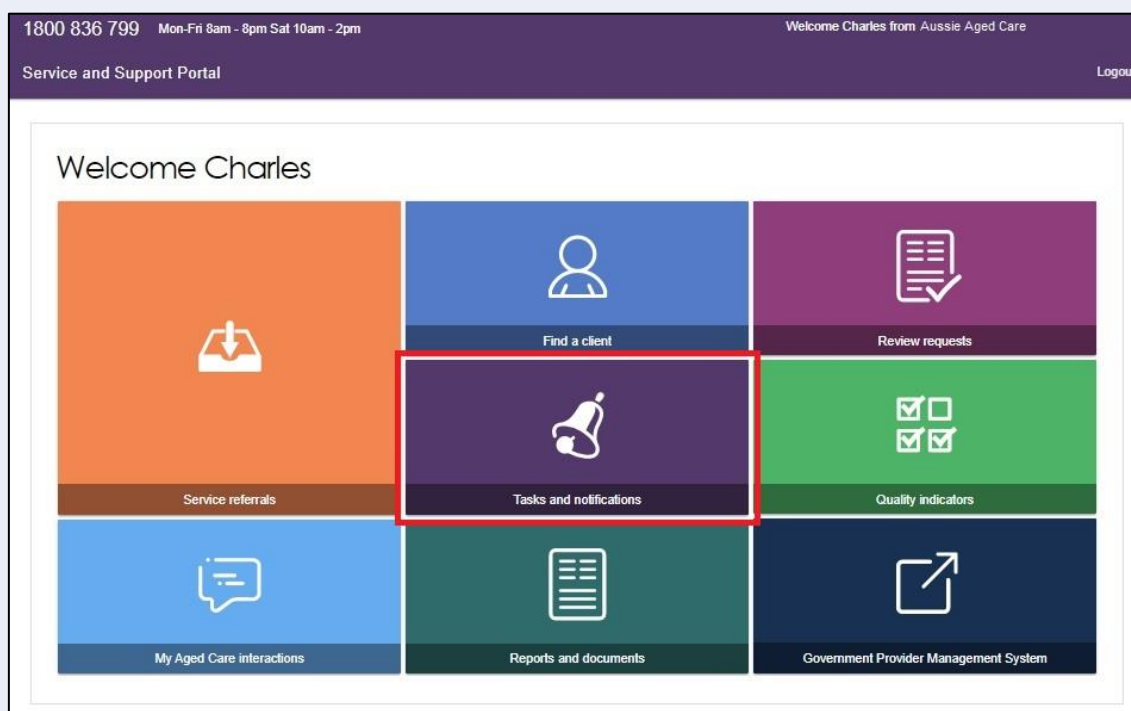
All staff with access to the Service and Support portal will have access to view tasks and notifications.

**!** You will receive a notification when a client's status has changed to 'Deceased'.

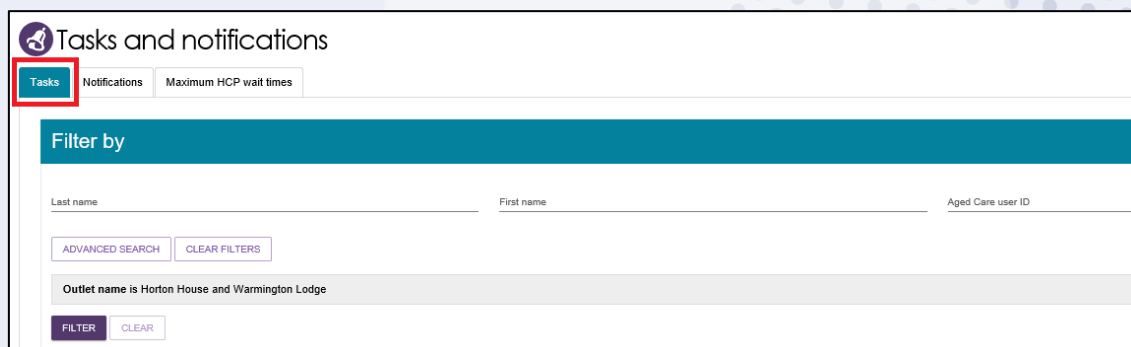
You should review the client record to see if further action is required, for example you may need to close or finalise any active referrals or cease services for the client.

## Viewing and actioning tasks

1. From the Portal homepage select **Tasks and notifications**.



2. The **Tasks** tab will open by default.



In the **Tasks** tab, you will be able to view all tasks that are relevant to your role. You can sort tasks by:

- Received
- Category
- Title/Description
- Aged Care User ID
- Client name
- Activity ID

! Tasks that have been marked as important for your outlet by your outlet administrator will be displayed with a visual indicator.

See [Managing task and notification preferences](#) for more information.

Alternatively, if you want to see all tasks and notifications for a single client, navigate to the **Tasks and Notifications** tab in the client's record to see all relevant tasks and notifications for that client.

You will only be able to see tasks and notifications that are associated to your outlet and for clients you are providing services to.

Assessors will be able to see all tasks and notifications for clients.

The screenshot shows the 'Tasks and notifications' tab selected in a client record. The tab is highlighted with a red box. Below the tab, there is a 'Filter by' section with a search icon. The main content area displays a table with columns: Type, Due Date, Received Date, Category, Title/Description, Channel, Activity ID, and Portal. A single notification is listed with details about a care extension request.

### 3. You can search for specific tasks using the filter options or using custom filters in **Advanced Search**.

Select the arrows to the right to expand or collapse the filter options.

The screenshot shows the 'Tasks' and 'Notifications' tabs. The 'Filter by' section is expanded, showing search fields for 'Last name:', 'First name:', and 'Aged Care User ID:'. Below these fields are buttons for 'ADVANCED SEARCH', 'CLEAR FILTERS', 'FILTER', and 'CLEAR'. The 'ADVANCED SEARCH' button is highlighted with a red box.

To apply custom filters, select **ADVANCED SEARCH** and choose filters from the drop-down menu and select **ADD FILTER** for each filter you want to apply.

Search tasks

Tasks

Choose an item.

- Activity ID
- Aged Care User ID
- Category
- Date received
- Due date
- First name
- Last name
- Marked as important
- Overdue tasks
- Role
- Title

ADD FILTER SAVE FILTER CLEAR FILTER

FILTER CANCEL

The hyperlink under the task description will take you directly to the individual record and the section of the portal where you can action the task.

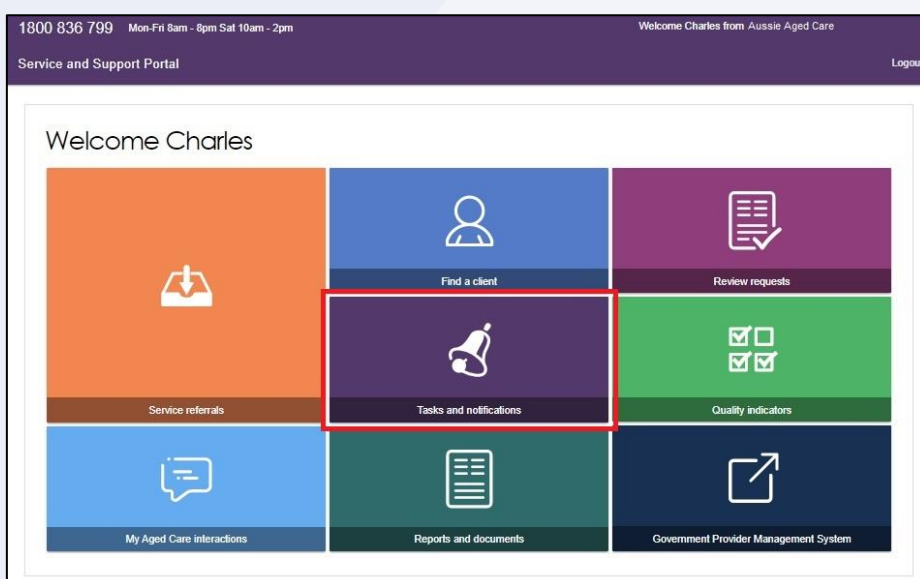
Alternatively, you can navigate to the client's record by selecting the client's Aged Care User ID from the tasks list.

For example, selecting the link in an **Overdue referral** task will take you directly to the **Incoming referrals** tab where you can review the referral and determine whether to accept or reject the referral or place the client onto a waitlist, where appropriate.

Once the action required from the task has been completed, the task will automatically be removed from your task list.

## Viewing notifications

1. From the portal homepage select **Tasks and notifications** and select the **Notifications** tab.



2. In the **Notifications** tab, you will be able to view notifications from the last 30 days that are relevant to your role. Any notifications older than 30 days will be removed and will no longer be visible in the portal.

The earliest date that the notifications are displayed from is visible under the filter options.

**Tasks and notifications**

Tasks **Notifications** Maximum HCP wait times

Filter by

Last name First name Aged Care user ID

ADVANCED SEARCH CLEAR FILTERS

Date received is after 31 August 2020 and Outlet name is Horton House and Warrington Lodge

FILTER CLEAR

Select all

Received	Category	Title/Description	Channel	Aged Care User ID	Client name	Select	Remove
29 September 2020	Client Services	<b>Late Commencement Date</b> Referral has been accepted but the commencement date entered is too far in the future (Medium Priority service type that is Transition Care or Residential Care). Aged Care User ID: AC9376287 Service Type: Residential People Low Care Outlet name: Horton House and Warrington Lodge Referral acceptance date: 13/05/2020 Activity ID: 1-75321976208 Go to: <a href="#">Services in Place</a>		AC9376287	SAND Baron	<input type="checkbox"/>	

Alternatively, if you want to see all tasks and notifications for a single client, navigate to the **Tasks and Notifications** tab in the client's record to see all relevant tasks and notifications for that client.

You will only be able to see tasks and notifications that are associated to your outlet and for clients you are providing services to. Assessors will be able to see all tasks and notifications for clients.

**Tasks and notifications**

Client summary Client details Referrals for my organisation Plans Attachments Approvals Services My Aged Care interactions Notes **Tasks and notifications** REQUEST A REVIEW VIEW PDF OF CLIENT RECORD

Filter by

Type	Due Date	Received Date	Category	Title/Description	Channel	Activity ID	Portal
Notification		9/9/2020	Client Services	<b>Care Extension Request</b> A formal Delegate Decision has been made for a care extension request. Details are as follows - Aged Care User ID: AC9126208 Service: Residential People High Care Requested By: Requested by Outlet name: Decision: Update Accepted Delegate Name: Assigned to: UTZ, Charles Go to: <a href="#">Services in Place</a>		1-7521199885	Service Provider Portal

In the **Notifications** tab, you can sort notifications by:

- Received date
- Category (activity subtype)
- Title/Description
- Aged Care User ID
- Client name

**Tasks and notifications**

Tasks Notifications HCP Notifications Maximum HCP wait times

Filter by

Last Name First Name Aged Care User ID

1 to 20 out of 3 matching results

ADVANCED SEARCH CLEAR FILTERS

FILTER CLEAR

☐ Select all

Received	Category	Title/Description	Channel	Aged Care User ID	Client name	Select	Remove
7 May 2022	RFA Classification	The reclassification is completed and there is a change in AN-ACC classification for Aged Care User ID <Aged Care user ID> to <classification level> for <care type> with effective date from <dd/mm/yyyy>.	<Text>	AC12345678	Johnny Bravo	<input type="checkbox"/>	
		Go to: <a href="#">Residential Care</a>					
2 May 2022	RFA Classification	The reclassification is completed and there is no change in AN-ACC classification for Aged Care User ID <Aged Care user ID> at <classification level> for <care type> with effective date from <dd/mm/yyyy>.	<Text>	AC87654321	Eddie Brock	<input type="checkbox"/>	
		Go to: <a href="#">Residential Care</a>					

! Notifications that have been marked as important for your outlet by your outlet administrator will be displayed with a visual indicator.

The [managing preferences](#) section in this guide explains how to set notifications as important.

Received	Category	Title/Description	Aged Care User ID	Client name	Select	Remove
28/06/2017	Referrals	<b>New Referral</b> You have a new referral from My Aged Care. Referral created at : 20/07/2017 18:29 Aged Care User Id: AC41264185 Outlet Name : Aged Care Allied Health & Residential Service Type : Allied Health and Therapy Services Priority: Medium Activity Id: 1-20852188999 <a href="#">Incoming Referrals</a>	<a href="#">AC48007322</a>	JORGENSEN Andy	<input type="checkbox"/>	

- You can also remove individual or bulk notifications from your portal by selecting the **Remove** icon, then select **ACCEPT**.

Filter by

☐ Select all

Received Category

20/07/2017 Referrals

Aged Care User Id: AC41264185  
Outlet Name : Aged Care Allied Health & Residential  
Service Type : Allied Health and Therapy Services  
Priority: Medium  
Activity Id: 1-20852188999  
[Incoming Referrals](#)

**Remove Notification**

This will remove selected notification from the current notifications list.

ACCEPT CANCEL

Select Remove

☐

4. You can search for specific notifications using the filter options or using custom filters in Advanced Search.

Select the arrows to the right to expand or collapse the filter options.

To apply custom filters, select **ADVANCED SEARCH** and choose filters from the drop-down menu.

Select **ADD FILTER** for each filter you want to apply.

Tasks Notifications

Filter by

Last name: First name: Aged Care User ID:

ADVANCED SEARCH CLEAR FILTERS

Date received is after 21 June 2017

FILTER CLEAR

5. The hyperlink under the notification description will take you directly to the individual record and the section of the portal where you can view more information about the notification or complete any action that may be required.

13/07/2017 Referrals **New Referral** [AC69957041](#) SCOTT Keri ☐

You have a new referral from My Aged Care.  
Referral created at : 13/07/2017 15:34  
Aged Care User Id: AC69957041  
Outlet Name : Aged Care Allied Health & Residential  
Service Type : Domestic Assistance  
Priority: Medium  
Activity Id: 1-20827807534

[Incoming Referrals](#)

For example, selecting the link in a New referral notification will take you directly to the **Incoming referrals** tab where you can view and action the new referral.

Incoming referrals

Incoming referrals Waitlist Accepted services pending Services in place Referral history

CARD LIST

Filter by

1 to 1 out of 1 matching result

Last name	First name	Aged care user ID	Due date	Referred date	Service type	Recommended start date	Priority
Scott	Keri	AC69957041	27/07/2017	13/07/2017	Domestic Assistance		Medium (2 days overdue)

## Managing task and notification preferences

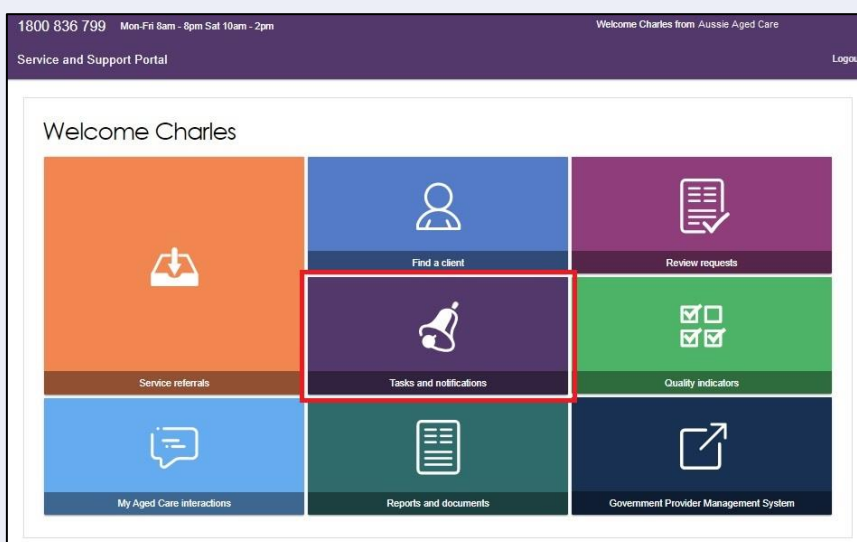
You must be an Administrator to manage task and notification preferences for your organisation or outlet. If you need to add this role to your user account, please see your organisation administrator.

As an administrator, you will be able to:

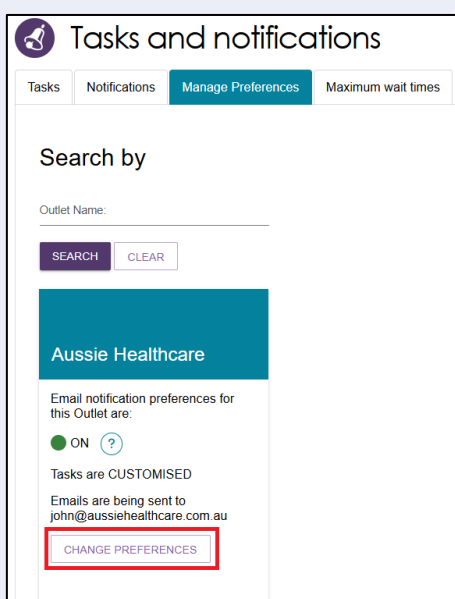
- edit email address and email frequency for new task and notifications
- turn off visibility of notifications in the assessor portal
- view descriptions of each task and notification, including which user types will be able to see them
- edit individual task and notification preferences
- mark a task or notification as important to your outlet.

These settings will affect all staff assigned to your outlet, so please ensure all staff are made aware of any changes you make.

1. From the Service and Support portal homepage select **Tasks and notifications**.



2. Select the **Manage Preferences** tab for your outlet, then the **Change Preferences** button.





**!** If you are the Organisation Administrator, you will be able to select which outlet you want to configure task and notification preferences for.

If you are the Outlet Administrator, you will only be able to see your outlet's preferences.

3. The preferences page for the outlet will open. At the top of the page, you can configure the overall preferences for email preference, email address, email frequency and notification visibility in the portal.

You can choose to hide all notifications or hide individual notification types for the outlet.

Selecting **No** to hide all means that no notifications for the outlet will be visible to staff associated with the outlet.

Selecting **No** for an individual notification type means that only notifications of that type will be hidden for staff associated with the outlet.

### Change preferences for Aged Care Allied Health & Residential

Receive emails for new tasks and notifications ?

☒ Yes ☐ No

Send email to: \_\_\_\_\_

Send emails: ? ▼

Show notifications in the portal? ?

☒ Yes ☐ No

?

4. Tasks and notifications are sorted by category. Select the expander (double arrow) icon to expand or collapse each category.

Show notifications in the portal? ?

☒ Yes ☐ No

?

Client Services	⌵
Organisation Administration	⌵
Quality Indicators	⌵
Referrals	⌵

For each task or notification you will be able to view:

- Type (e.g. task or notification).
- Title and brief description of the why the task or notification has triggered.
- User type who can view or action the task or notification.

For each task or notification you will be able to individually configure:

- Whether to send an email when a task or notification generates.
- Frequency of email notification, if enabled.
- Whether to display a task or notification as important in the portal.

**Referrals**

**Task: Overdue Referral**  
A referral has not been accepted or rejected within required timeframes. Please review and action this referral as soon as possible  
**This task is seen by:** SP Team Lead

**Send an email when this type of task is received?**  
☒ Yes ☐ No

**Show this type of task as important?**  
☐ Yes ☒ No

**Notification: Client Identity and Info**  
A client has been deactivated in the My Aged Care system, and their Service referral has been automatically recalled.  
**This notification is seen by:** SP Team Lead

**Send an email when this type of notification is received?**  
☒ Yes ☐ No

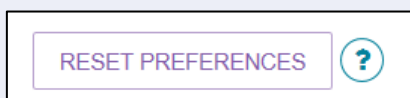
**Show this type of notification as important?**  
☐ Yes ☒ No

If you choose to mark a task or notification as important, staff within your outlet who can view that particular task/notification will see a visual indicator in their portal.

For example, a notification of home care correspondence.

Received	Category	Title/Description	Aged Care User ID	Client name	Select	Remove
28/06/2017	Referrals	<b>New Referral</b> You have a new referral from My Aged Care. Referral created at : 20/07/2017 18:29 Aged Care User Id: AC41264185 Outlet Name : Aged Care Allied Health & Residential Service Type : Allied Health and Therapy Services Priority: Medium Activity Id: 1-20852188999 <a href="#">Incoming Referrals</a>	<a href="#">AC48007322</a>	JORGENSEN Andy	<input type="checkbox"/>	
	Important					

5. Select **SAVE** when all changes have been made. You can reset the preferences by selecting **RESET PREFERENCES** at the top of the page.



## For more information and support

Further information is available from the [My Aged Care for service providers](#) website.

If you require further assistance, please contact the My Aged Care Service Provider and Assessor helpline on **1800 836 799**, Monday to Friday (8am to 8pm) and Saturday (10am to 2pm) **local time** across Australia.